Introduction

The Center for International Private Enterprise (CIPE) seeks proposals from qualified consultants to conduct a financial and related business processes review. The successful candidate will be expected to gather information on CIPE’s financial processes and propose best practices to maximize efficiency and minimize risk. The consultant will be required to submit a final report that includes analysis and recommendations for how CIPE can improve its financial and related business processes.

Background

The Center for International Private Enterprise (CIPE) is one of the four core institutes of the National Endowment for Democracy and an affiliate of the US Chamber of Commerce. Since 1983 CIPE has worked with local partners around the world to craft business-driven solutions to social-economic problems that affect millions of people. CIPE believes that democracy is at its strongest when the private sector is flourishing. Working with local partners that include business associations, chambers of commerce, think tanks, universities and advocacy organizations, CIPE is helping to create an enabling environment for business to thrive.

CIPE is headquartered in Washington, DC with offices in nine countries. Its current workforce includes approximately 100 employees in Washington, DC, 32 in its field offices and a number of representatives worldwide.
CIPE has experienced tremendous growth in recent years and anticipates this trend to continue. The projected budget for FY 2020 is $30 million, an increase of 40% over four years. CIPE distributes approximately 31% of its funding in grants to its overseas partners. The growth in staff, projects and global reach requires operating systems and functions that are nimble, efficient, and minimize risk.

CIPE’s Finance and Grants/Contracts department maintains the efficiency of CIPE’s financial systems and the integrity of its accounts. It also oversees procedures that generate all financial transactions. The department’s responsibilities include budgeting, cash management, accounts payable and receivable, payroll, financial reporting, grants and contracts management, and other routine financial transactions. To accomplish these tasks, the department utilizes the following systems:

- Solomon Accounting Software
- K2 Workflow Application – payment processing
- Legacy Java Application for Grants Management (EPIC)
- QuickBooks – field office expense reporting
- ISolved – time and attendance reporting and generating reports for payroll
- Excel – staff expense reports, budgets, cash flow management, and A/P aging reports

**Scope of Work**

CIPE seeks qualified consultants to conduct an analysis of its financial and related business functions and processes to determine: (a) how well those processes address CIPE’s business needs; (b) potential changes in CIPE’s work processes that would increase efficiency and effectiveness; (c) whether CIPE is leveraging the most appropriate technology to meet the business needs; and (d) if the department is appropriately structured and staffed to achieve optimal performance.
Tasks and Deliverables
The successful candidate will be expected to work closely with Management, Finance and Grants/Contracts staff, Program staff, and other internal stakeholders to evaluate, solicit feedback, and recommend improvements to CIPE’s financial and related business processes, the structure of the department to perform those processes, and technological support for those processes based on best practices.

The deliverables resulting from this project include:

I. **A Plan to assess CIPE’s current finance and related processes and staffing structure**
   - Meeting with Senior Management to discuss the best methods for executing the project;
   - Reviewing CIPE’s current financial and related processes, the corresponding technologies used to support those processes, and departmental staffing structure. CIPE will provide materials as requested, and will make staff available to answer questions about its processes;
   - Developing interview questions to gather internal information on staff satisfaction with the current finance and operating processes;
   - Drafting an evaluation plan for presentation to CIPE’s Senior Management for review and comment; and
   - Preparing a final plan incorporating comments from CIPE’s Senior Management.

II. **Information gathering to implement the evaluation plan**
   - Communicating with identified stakeholders to assess CIPE’s specific needs;
   - Conducting interviews of Management, Finance and Grants/Contracts staff, and other select stakeholders and analyzing the responses; and
• Shadowing Finance and Grants/Contracts staff and their work with other departments for purposes of analyzing workflow.

III. A draft report summarizing the results of the evaluation with recommendations on how processes, staffing structure, and technology can be improved.

A draft report with written recommendations for CIPE’s Senior Management review and consideration that includes but may not be limited to:

• Description of the current processes and staffing structure;
• An assessment of the effectiveness and efficiency of CIPE’s current finance and related process and staffing structure; and
• Detailed recommendations for improving processes, staffing, and technology that will increase efficiency and effectiveness (what processes currently being performed could be made more efficient, reduced or removed entirely? What enhancements could be utilized through process improvement and/or implementation of software to create efficiencies? What is the estimated cost of implementing recommendations?)

IV. A final report that incorporates CIPE’s Senior Management feedback to the draft report

Required Qualifications
To be considered for full evaluation and possible award, respondents must meet the following requirements:

• 5+ years working in financial process improvement, or related services;
• Experience working with non-profit organizations or government agencies; and
• Experience with the systems that CIPE uses for its financial processes or similar systems (see list in the Background Section).
In addition to the minimum qualifications listed above, CIPE will give preference to respondents with experience working with international NGOs and/or grant-making organizations.

**Proposal Submission Requirements**

All proposals must be well-organized and demonstrate how the respondent’s services, methodology, qualifications, experience, and terms meet or exceed CIPE’s requirements. Proposals must also contain the following:

- Respondent’s full name, address, telephone number, contact person, email, and website.
- Respondent’s overview, including a brief history, mission, number of employees, and number of years in operation.
- Proposal contact person. Please include title, phone number, and email address.
- Experience providing the requested services.
- Description of the proposed project team, including staff qualifications, resumes, and roles and responsibilities.
- Estimated time it will take to complete the requested tasks and deliverables.
- Evidence of experience working with non-profits and/or grant-making organizations
- A sample of a completed financial business process report (redacted, if necessary).
- Methodology used in conducting financial business process and system reviews.
- Experience working with CIPE’s financial systems or similar systems, as identified in the Background section.
- Three references from organizations where the respondent conducted work similar to the services requested in this RFP. Include the organizations’ names, a brief description of the services provided, the name, title, telephone number and email address of references who are knowledgeable about the respondent’s work and may be contacted by proposal evaluators.
Proposal Budget

Pricing must be itemized and include a written explanation of all fees and costs. Please note CIPE is a 501(c)(3) tax exempt organization.

Proposal Submission and Schedule

Proposals should be submitted via email in Microsoft Word or PDF format to processRFP@cipe.org by 5:00PM eastern standard time, June 4, 2020. Late proposals will not be considered. The respondent is responsible for all costs incurred in preparing the proposal. CIPE will not cover any proposal costs.

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<td>RFP Issued</td>
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<tr>
<td>Deadline for Respondents to Submit Questions</td>
<td>May 15, 2020</td>
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<tr>
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Please email questions regarding this RFP to Tabitha Wilson Forde at processRFP@cipe.org. All questions and responses will be published on May 19, 2020 by 5:00PM eastern standard time on CIPE’s website (https://www.cipe.org/who-we-are/opportunities/). No verbal answers will be provided. Respondents may be invited to provide a general presentation to CIPE’s Senior Management and discuss capabilities that are in line with this RFP.
Proposal Evaluation Criteria

A contract will be offered to the respondent who provides the best value and demonstrates an appropriate balance of price, quality, and performance. Proposals will be evaluated based on the following criteria:

I. **Price**
   - The price is reasonable, reflects a clear understanding of CIPE’s need, and is consistent with the services offered in the proposal.
   - The cost of incidental expenses, including travel and transportation costs.

II. **Quality**
   - Responsiveness to RFP requirements
   - Project plan and approach
   - Qualifications and experience of respondent and proposed staff
   - Technical expertise
   - Delivery schedule

III. **Performance**
   - Ability to timely produce deliverables
   - Understanding of and ability to meet CIPE’s needs

RFP Conditions

CIPE reserves the right to:
   - Accept or reject any or all proposals, or any part thereof;
   - Conduct discussions with respondents and accept revisions of proposals after the closing date;
• Make an award based upon CIPE’s various selection criteria;
• Request clarification from any respondent on any or all aspects of its proposals;
• Cancel or re-issue this RFP at any time;
• Retain all proposals submitted in response to this RFP; and
• Invite some, all, or none of the respondents for interviews, presentations and further discussion.

Confidentiality

During the RFP process and/or the performance period, CIPE may provide confidential or proprietary information. Any confidential or proprietary information must not be used to benefit any third-party and must not be disclosed to anyone unrelated to this solicitation or the work that will be performed.

CIPE will also maintain the confidentiality of any information and materials submitted by respondents marked as confidential or proprietary.