



**Incorporated Research Institutions for Seismology
Request for Proposal**

Accounting System Evaluation and Recommendation

November 6, 2017

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Incorporated Research Institutions for Seismology

Request for Proposal

Accounting System Evaluation and Recommendation

Proposal Due Date: ~~11/21/17~~ REVISED 11/30/17

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I. Background

A. Information about IRIS

The Incorporated Research Institutions for Seismology (IRIS) is a consortium of over one hundred U.S. universities dedicated to the operation of science facilities for the acquisition, management, and distribution of seismological data.

IRIS programs contribute to scholarly research, education, earthquake hazard mitigation, and the verification of the Comprehensive Test Ban Treaty, in addition to the long-term stewardship of collected data.

Primary support for IRIS comes from the National Science Foundation (NSF) through cooperative agreements and grants. Other sources of funding may include federal agencies, universities, private foundations and individual donations.

IRIS is a 501(c)(3) nonprofit organization incorporated in the state of Delaware with its primary headquarters office located in Washington, DC.

IRIS has 61 full-time employees as of 11/3/17, working from locations that include DC, WA, NM, AK, NY, MA, AZ, CO, and CA.

For more information, please visit our webpage at <http://www.iris.edu>.

B. Information about IRIS Financial Services

The Accounting Department at IRIS, also called IRIS Financial Services (FS), consists of the following (7) staff positions:

- Chief Financial Officer
- Assistant Controller (open)
- Project Cost Controller
- Accounting Manager
- A/P Manager
- Staff Accountant – Purchasing
- Staff Accountant – A/R, Travel

The current accounting system used by IRIS FS since 2003 is Deltek GCS Premier Version 5.00, used with IBM Cognos Impromptu Administrator Version 7.5 for the export of data into Excel.

A copy of IRIS' 2016 audited financial statement is available upon request.

II. Project Description

IRIS seeks an experienced consulting group to conduct an evaluation of our business needs and recommend the accounting software solutions(s) that will provide the best value for our organization.

IRIS' preliminary survey of potential accounting solutions include:

- Deltek Costpoint
- Sage Intacct
- Unanet
- Financial Edge NXT

This list is not intended to limit the scope of this project.

IRIS' system requirements include:

- Accounting system – core applications
- Grants/Fund Accounting
- Indirect pools
- Purchasing
- Fixed Assets
- Reports

Desired features include:

- Ability to import data
- Integration with existing 3rd party vendors
- Increased reporting capability
- Expanded user access (outside the Financial Services group)

III. Project Deliverable

The project deliverable will be a final report, along with supporting documentation that details the analysis of five or more accounting software options*. The report must clearly document the basis for its recommendation and provide actionable information. (*Planned due date for final deliverable is no later than ~~Thursday, December 28, 2017.~~*)

Revised due date for final deliverable is Thursday, January 18, 2018.

The proposal should include a meeting following submission of the final report to discuss and clarify report results with IRIS staff.

*The report must identify all accounting systems that were considered and the basis for disqualification, if applicable. The report should also include an analysis of the potential accounting solutions identified in the project description (II), unless a basis for the disqualification of one or more software options are mutually agreed upon during the interview/data gathering phase.

The evaluation of proposed accounting systems should consider, but is not limited to:

- Features and functionality
- Ease of installation
- Software setup / customization
- Reporting capability
- Scalability
- Audit trail
- Interfaces
- Maintenance / Support
- Costs (including maintenance, support, training, conversion, etc.)
- Overall value

IV. Respondent Instructions

A. Intention to Bid

If your company intends to respond to this RFP, please send an email acknowledgement to candy@iris.edu by **November 13, 2017**.

B. Proposal Evaluation Criteria

Proposals will be evaluated on the basis of both the written proposal and any written responses to questions IRIS may receive. However, IRIS may use information other than that provided by the Respondent in its evaluation.

IRIS will rank proposals on the following criteria (not listed in order of priority):

- Proposed plan and schedule
- Cost
- Experience/resources
- Staff credentials

C. Proposed Cost

Proposal must include a detailed, itemized quote for all services and expenses to be paid under a contract for the proposed work, and proposed billing arrangements.

D. References

Proposals must include three (3) client references. The minimum information that must be provided about each reference is:

- Name and address of company
- Name, phone number, and email address of contact person
- Type of services provided to reference and date(s) provided

E. Proposal Length

The proposal should be limited to **10** pages including budget and supporting materials, and must stand on its own with respect to the evaluation.

F. Supplemental Information

Any supplemental information furnished by a Respondent after the due date for receipt of proposals will not be considered, unless IRIS formally requested such information. IRIS may request a Respondent to furnish such supplementary information as is required, in the opinion of IRIS, to assure that the Respondent can successfully perform the contemplated work.

G. Rights of Retention

Following submission of proposals and final evaluation, IRIS will have the right to retain the proposals, maintaining them in confidence. All documents submitted in response to this RFP shall become the property of IRIS.

H. Clarification of RFP

Any questions, requests for clarification or requests for data in connection with this RFP may be submitted via email to candy@iris.edu.

I. Cost of Proposal

IRIS will not reimburse the Respondent for their cost of preparation and submission of a proposal.

J. Confidentiality

IRIS shall treat responses to this RFP as proprietary and confidential property (hereinafter "Proprietary and Confidential Information"). News or other information releases pertaining to this RFP shall not be made without prior written approval from IRIS.

K. Proposal Submission

Proposal submission deadline is ~~Tuesday, November 21, 2017 at 5:30 EST~~. Submit one electronic copy to: candy@iris.edu. ~~Proposal submission deadline has been extended to THURSDAY, November 30, 2017.~~

V. Selection

IRIS reserves the right to make its selection based solely on the information provided, to reject any or all proposals, to accept any proposals, or to effect any combination of proposals. IRIS reserves the right to conduct discussion or request proposal revisions, if deemed necessary.

The selection will be made on the basis of IRIS' evaluation and determination of which proposal will provide the greatest benefit to IRIS, not necessarily on the basis of lowest price. IRIS has no obligation to reveal how proposals were assessed. Therefore, proposals should contain your best terms within the proposed functional and technical approach.

IRIS reserves the right to reject any or all proposals that are deemed to be non-responsive, late in submission or unsatisfactory in any way. IRIS shall have no obligation to award a contract for work, goods and/or services as a result of this RFP.

VI. Preliminary Schedule

The following schedule may be changed or modified by IRIS:

		Revised schedule
1. RFP issued:	11/6/17	11/6/17
2. Email acknowledgement – Intent to Bid due:	11/13/17	11/13/17
3. Proposals due:	11/21/17	11/30/17
4. Selection made:	11/30/17	12/08/17
5. Respondents notified of determination:	12/1/17	12/11/17