

Issued: May 24, 2021

Request for Information & Demonstrations for Enterprise Resource Planning Software

[Health Research, Incorporated](#) (HRI) is requesting information from qualified providers of Enterprise Resource Planning (ERP) software to organize day to day functions including: (i) Accounts Payable, (ii) Accounts Receivable/Billing, (iii) Bank Reconciliation, (iv) Budgeting, (v) General Ledger, (vi) Grant Accounting, (vii) Human Resources Capital Management (recruitment, self-serve, onboarding, training performance evaluations), (viii) Employee Travel, (ix) Purchasing, (x) Time records with time and effort reporting, certification, and accrual tracking (xi) Labor Cost Allocation/Distribution, (xiii) Payroll, (xiv) Subcontract Management and (xv) Fixed Assets. Critical to this solution is the capacity is grants management and sponsor reporting, which is key to the organizations' revenue portfolio and mission.

This RFI is for planning purposes only and should not be interpreted as a solicitation for bids by Health Research, Inc.

Background

HRI was established in 1953, primarily to serve the research programs of the Roswell Park Cancer Institute, which at the time was an institution of the Department of Health. In addition to the services provided to Roswell Park programs through its HRI Roswell Park Division located in Buffalo, the corporation now serves major programs located at the New York State Department of Health through its Albany Division. In its long history, HRI has accepted and administered over ten billion dollars in funding to supplement DOH, RPCI and other health related programs, and has established a proven track record of assuring that funds are utilized in accordance with the requirements of the sponsor. Sources of funding include Federal agencies, not-for-profit foundations, and commercial firms. In addition, HRI administers funds from individual donors, estate bequests and court settlements. HRI can meet virtually any stipulated accounting and reporting requirement.

Existing Systems Overview

HRI's current application environment is based on the integration of several software applications that have been modified and extended to meet the growing requirements of HRI's business needs. Together, these systems provide HRI's core capability, but require significant maintenance and integration efforts, and exclude several processes that continue to be performed manually or without integration to core systems. Table 1 below provides HRI's current technical environment. Table 2 provides HRI's operating volumes, and Diagram 1 depicts the application environment.

Demonstrations

HRI invites vendors that can provide most of the required functionality for an ERP software (as described above) to provide product demonstrations to better inform the requirements for the formal Request for Proposal process. It is anticipated that HRI will release an RFP in late Summer 2021. Vendors interested in providing demonstrations must complete the short survey in Appendix A and return to Elizabeth.Wood@healthresearch.org by 5pm, Friday June 11th.

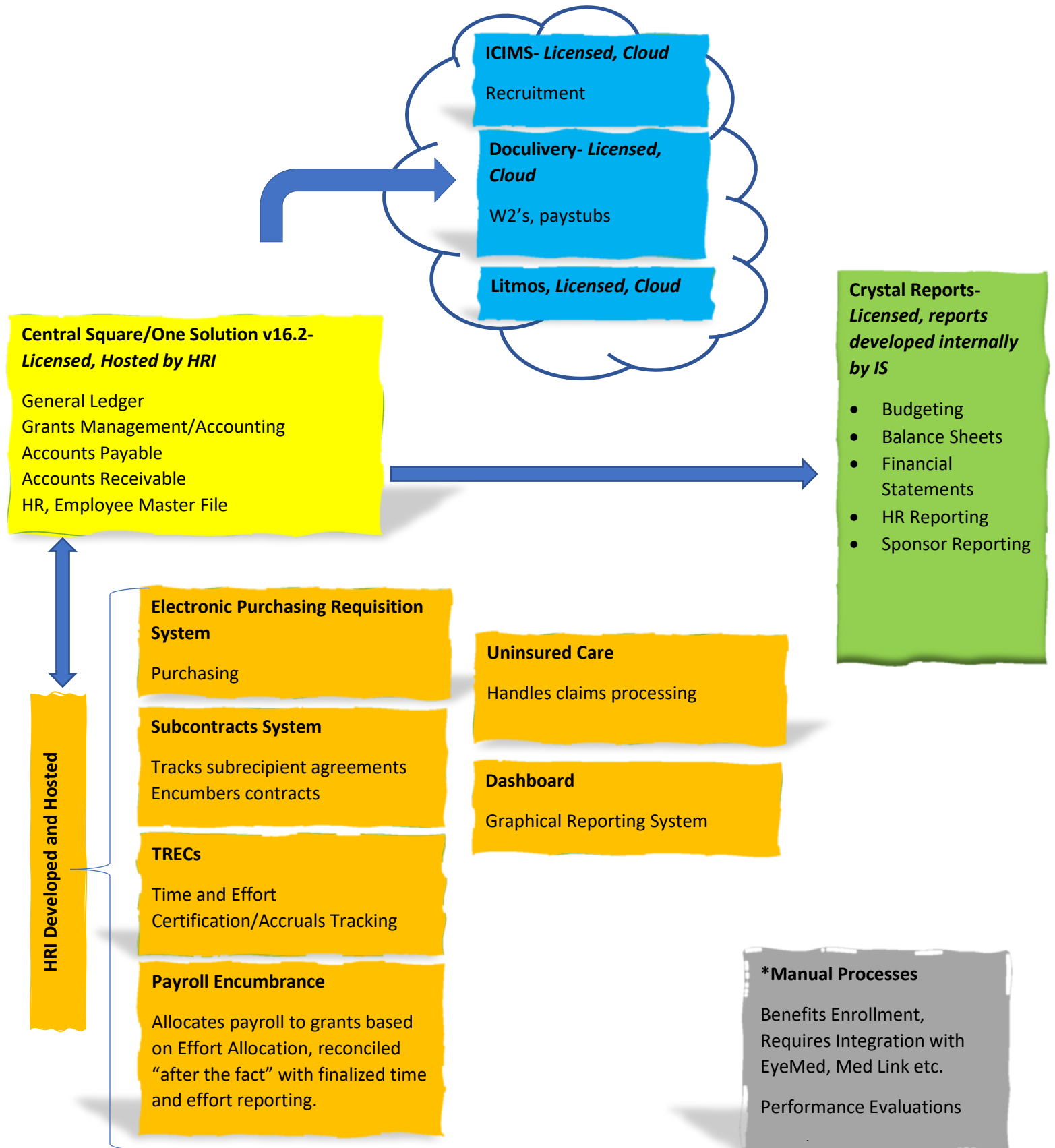
Table 1- HRI Technical Standards

Item	Technical Standards
Network and Security	
Internet Connection(s)	100 Mb, 1 Gb, depending on location
WAN Connection(s)	MPLS, or ethernet, depending on location
LAN Connection(s)	Cisco Meraki Equipment, Gb internal network
Firewall / Content Filtering System	Cisco Meraki firewall, content filtering with Meraki and with Zscaler
Remote Access	Duo (2 factor); Meraki VPN
User Authentication	Okta
Server, Storage, Backup	
Server Hardware	Dell
Server Operating System	Linux, Windows
Server Virtualization	VMware 6.5
Storage Area Network	80 TB Albany, Malta 100 TB
Backup Solution & Devices	VMware Site Recovery Manager, Netbackup
Application and Database	
Business Application Environment	OneSolution
Email System	Microsoft Office 365
Relational Databases	Microsoft SQL Server, Sybase SQL Server
End User Device and Software	
Desktop/Laptop Hardware	Dell Intel i5 or better with a minimum of 8GB memory
Desktop/Laptop Operating System	Microsoft Windows 10
Productivity Tools	Microsoft Office 365
Internet Browser	Microsoft Edge

Table 2- Operating Volumes

Operating Volumes/Standards	Current
General	
Number of Locations	28
Personnel (Salary) Budget (Average last 3 years)	\$87M
Number of IT power users	6
Number of HCM/Payroll Users (Total Current)	12
Number of Regular Employees	1195
Number of Applicants (Annually)	3,769
Number of Grants Managed Annually (to fund positions)	>250
Total Annual Revenue 2019	\$ 817M

Diagram 1- HRI Current State Application Environment



Survey
Health Research Inc.
ERP- Request for Information

Vendor Name: _____

Product Name: _____

1. Please describe ERP solutions your organization provides, specifically:
 - a. How the solution is packaged – COTS or proprietary; modular or tightly integrated; cloud or local
 - b. How the solution is priced (please include methodology only, e.g., Per Member Per Month, fixed price per year, data usage—please do not provide actual purchase prices)
 - c. Where the solution is currently deployed, or expected to be deployed, and how long it has been in use
 - d. Configuration and customization typically required to adapt the product for use in a not for profit organization.
 - e. Technical architecture and processing capacity/scalability
 - f. User-facing and self-service capabilities
 - g. Interface support and extensibility
 - h. Grants Management/Accounting functionality

2. Please indicate all functions that your solution offers:
 - Accounts Payable
 - Accounts Receivable/Billing
 - Bank Reconciliation
 - Budgeting
 - General Ledger
 - Grant Accounting
 - Human Resources Capital Management (recruitment, self-serve, onboarding, training performance evaluations)
 - Employee Travel
 - Purchasing
 - Time records with time and effort reporting, certification, and accrual tracking
 - Labor Cost Allocation/Distribution
 - Payroll
 - Subcontract Management
 - Fixed Assets

3. Have you implemented an ERP in any other non-profit organizations?

4. What do you believe is the optimal duration for data conversion, testing and implementation after selection of an ERP solution? Are there any functional modules that can be deployed in stages or does the enterprise typically go live all at once?

5. Do you have a live or recorded product demonstration to provide overview of all noted functionality of your solution (not to exceed two hours) that would be available to Health Research Inc. during the next 2-4 weeks?

If so, provide contact person to schedule demonstration:

Name: _____

Title: _____

Email: _____

Telephone: _____