

Request for Information (RFI)

Issued on: March 8, 2023

Solicitation Number: RFI US-GPR-ITS

For: Policy Management Software

Proposal Deadline: April 4, 2023 at 5:00pm EST

Introduction to Catholic Relief Services

Headquartered in Baltimore, Maryland, Catholic Relief Services (“CRS”) eases suffering and provides assistance to people in need, without regard to race, religion or nationality. CRS has more than 8,000 staff based in the United States and Overseas. Overseas, CRS organizes its operations at the country-level into Country Programs (CPs), and at the regional-level into regions.

Statement of the Problem

CRS current Policy Management programs are decentralized. The updates and approvals are manually managed through MS Word. Policies may be in different formats and may undergo different internal approval processes.

Objective

CRS is seeking an agency-wide policy management system to facilitate an efficient, consistent, and effective policy management life cycle (e.g., Develop, Review, Publish, Affirm, Report and Audit etc.) for its policies, country manuals, forms, procedures, etc. The preferred system will resolve gaps, inefficiencies, and root causes of pain points in the alignment between policies and positively impact end-to-end processes from policy design to policy release. CRS uses Oracle as its Human Capital Management platform; the policy management system must be compatible with Oracle.

Statement of Work (SOW)

Please refer to Annex A for the Statement of Work.

Requested information

Administrative:

Interested vendors must:

1. Have legal status in their country of operation. CRS may request a copy of the vendor’s Articles of Incorporation, Certificate of Status, or other proof of legal status.
2. Disclose any existing or potential conflict of interest with CRS staff in writing. A conflict of interest does not preclude CRS from working with a vendor, but the disclosure is required.

Technical:

Interested vendors are requested to submit a technical response that addresses how the software will achieve the goals and technical requirements listed in Annex A: Scope of Work:

1. Facilitate an efficient process for the development, review, revision, approval, and release of CRS policies.
2. Provide easy follow up with content owners through automatic policy expiration reminder notices, allows Policy owner to see the process as content owners update policy content, etc.
3. Enable a rhythm of the business through workflow notifications to content owners which allows them adequate time to review, revise, audit content edits by others, gain approvals, and release the policies prior to the expiration date.
4. Provide reporting and easy tracking of policy status in the review process, released, pending expiration, delinquent reviewers, etc.

5. Facilitate consistency in configurability of agency policies globally; enable consistent formatting and availability where required.
6. Facilitate content owner abilities to assess policy compliance with CRS' approval process and applicable legal regulations.
7. Supports configuration which allows policies to be distributed or targeted to the appropriate audience which may be both internal staff, external donors, government auditors, or the public at large.
8. Provides easy access and search functionality for policies allowing anyone with view access to search for published policies relevant to their profile, i.e. drives staff visibility of policies by CRS configured viewer / owner parameters; and includes controls to limit ability to edit documents to only those who are given that authorization.

Upon review of written technical responses, CRS may request:

- a demonstration of the proposed software or application and reporting solution
- references

Financial:

While this is not an RFP, CRS requests vendors interested in being invited to the final RFP submit pricing for the proposed solution. All costs included in the provision of the solution must be included in this pricing.

Clarifications

Bidders are strongly encouraged to submit any questions or need for clarification via e-mail to corinne.shutack@crs.org no later than 5:00pm EST on **March 17, 2023**. The solicitation number indicated above must be included in the subject line. CRS is under no obligation to respond to questions that are not received prior to the aforementioned deadline.

Response Deadline

All responses must be received by CRS no later than 5:00 PM EST on **April 4, 2023**.

Bid Submission

Responses must be submitted by email to corinne.shutack@crs.org, and the solicitation number indicated above must be included in the email subject line.

Modification

If at any time CRS deems there to be a need for a significant modification to the terms and conditions of this RFI, CRS will issue such a modification as a written RFI amendment to all potential bidders. No oral statement of any person shall in any manner be deemed to modify or otherwise affect any RFI term or condition, and no offeror shall rely on any such statement. Such amendments are the exclusive method for this purpose.

RFI Result

As a result of this solicitation, CRS may release an RFP to selected providers based on the results of the technical capacity and pricing assessed in the RFI responses.

Terms

CRS reserves the right to cancel this solicitation at any point and is under no obligation to issue a contract as a result of this solicitation. CRS will not reimburse any expenses related to the preparation of any response related materials or delivery.

ANNEX A: STATEMENT OF WORK

Goals for the software

- To integrate a global repository that supports the workflow for the creation, review, renewal, housing, and distribution of all agency policies, country manuals, forms, procedures, etc.
- To provide checkpoints to ensure policy changes are consistent in light of other intersecting policies
- To ensure the 250+ policies & procedures are able to be reviewed consistently to ensure policies comply with local labor laws and regulations.
- To ensure that every employee has access to the most up to date policies related to their employment with the agency.
- System enables technical language translation (where needed) into at a minimum to Spanish, French, and Arabic and enable searchability and housing of the translated policies.
- Document control and security (e.g., viewing, editing, approving policy etc.).
- Lifecycle management (e.g., Develop, Publish, Report, and Audit etc.) for policy documents.
- Provide a central location for all agency policies, procedures, forms, manuals, etc. to ensure access to most up to date policy documents.

Goals for staff functionality

- Improved policy communication and collaboration across the agency.
- Robust version controls and tracking employee acknowledgement of policies.
- Tracking of non-compliant content owners and reviewers and send notification reminders.
- Minimize workload of content owners when revising and sharing policies with staff.
- Provide easy access to policies and a workflow solution that enables management and employees to be held accountable for reviewing or acknowledging policies in a timely manner.
- Paperless processes with ability to extract policies to share externally as needed (e.g., save the paper, toner, and storage costs associated with paper policy manuals).

Requirements

Please see the attached Requirements Traceability Matrix.