



# **Request For Quote**

## **ERP Project Management Consultant Services**

Clinton Health Access Initiative  
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## 1.0 About CHAI

Founded in 2002, by President William J. Clinton, the Clinton Health Access Initiative (CHAI) is a global health organization committed to strengthen integrated health systems around the world and expanding access to care and treatment of HIV/AIDs, Malaria and other illnesses. Based on the premise that business oriented strategy can facilitate solutions to global health challenges, CHAI acts as a catalyst to mobilize new resources and optimize the impact of these resources to save lives, via improved organization of commodity markets and more effective local management. By working in association with governments and other NGO partners, CHAI is focused on large-scale impact and, to date, CHAI has secured lower pricing agreements for treatment options in more than 70 countries. CHAI's teams are working side-by-side with over 30 governments to tackle many of the largest barriers to effective treatment and care.

CHAI currently employs over 1000 employees and has offices in over 30 countries. With the exception of the Boston office whose primary focus is on back-office operations (finance, HR, IT) and supporting global teams, CHAI's country/global teams perform direct "boots-on-the-ground" program work in countries.

## 2.0 RFQ Purpose

CHAI is currently in the process of implementing a new financial ERP application (NetSuite) to support its growth and efficiency in the implementation of transformational public health programs supported by diverse donors. CHAI's top leadership objectives of the new ERP includes:

- Reduction of CHAI's monthly financial close to 10-15 days
- Full financial information self-service and real-time access by program and country teams
- Simplified financial reporting and streamlined financial processes (manual steps and error reduction)
- Robust donor, statutory reporting and risks controls and compliance

CHAI is soliciting quotes for an ERP project manager consulting services *to fully lead and complete the roll-out of CHAI's new global finance system* (NetSuite). The purpose of this request for quote (RFQ) is to identify the firm with ERP project management expertise that can hit the ground running to take over leading the completion of ERP roll-out.

## 3.0 ERP PM Consultant Responsibilities

The ERP PM consultant will collaborate internally with finance functional leads, country finance heads, and stakeholders (at the country and global level) and externally with the NetSuite Professional Services. Key responsibility highlights include:

- Oversee the planning (testing, training, etc.), quality, delivery, and management across all aspects of the implementation project to achieve CHAI's top finance system objectives and future state vision
- Keep the project on schedule, to cost, within scope, and to the expected quality
- Ensure integration of other peripheral finance applications
- Create a cohesive team environment for all internal and external resources engaged in the project
- Champion and guide the adoption of standard solutions and best accounting practices
- Evaluate and identify opportunities to streamline CHAI finance streams to eliminate redundancy, manual work and ensure real-time information access
- Effectively manage internal and external team collaboration and communication.
- Ensure ERP workflows incorporate key financial controls as identified in policies and procedures.
- Research problems/issues as they arise and propose solutions
- Work with key finance leads to identify critical donor and statutory reporting
- Act as a point of escalation for project delivery issues from all partners and stakeholders
- Work with the business to develop a robust go-live transition and governance plan
- Provide subject matter expertise in financial reporting, costing, budgeting and forecasting, compliance
- Evaluate and identify system functional gaps and solutions needed to support CHAI's objectives
- Evaluate and identify risk and process controls to ensure transparency and regulatory compliance

## 4.0 Quote Terms

CHAI is seeking a **fixed-fee contract engagement for 12-18 months** with set tangible milestone deliverables to be defined and agreed to by both parties. Key milestones may include (but not limited to):

- Full go-live timeline assessment and plan completion with agreed to milestone deadlines
- End-to-end business scenario testing completion
- User training completion
- Migration completion
- Critical 3<sup>rd</sup> party integration completion
- Critical management, donor and statutory reports/dashboard completion
- Critical finance process/procedures documentation completion

### 4.1 Schedule

| Activity                | Date       |
|-------------------------|------------|
| Release of RFQ          | 07/31/2025 |
| Quote receipt deadlines | 08/15/2025 |
| Finalist interviews     | 09/09/2025 |
| Selection notice        | 09/19/2025 |

### 4.3 Response Content

RFQ response packages should include the below minimum information:

- the firm's legal name, address, and telephone number;
- the principal(s) of the firm and their experience and qualifications;
- the experience and qualifications of the proposed consultant to be assigned to the project
- a description of consultant's prior experience, including any similar projects
- a description of the firm and consultants' current work activities (especially with global ERP projects)

The selection of finalists to be interviewed will be based on an evaluation of the written responses. The award will be made to the most qualified offer or whose quote is deemed most advantageous to CHAI, all factors considered. Unsuccessful offers will be notified in writing as soon as possible. This solicitation is being offered in accordance with federal and state requirements governing procurement of professional services. CHAI reserves the right to negotiate an agreement based on fair and reasonable compensation for the scope of work and services proposed, as well as the right to reject any and all responses deemed unqualified, unsatisfactory or inappropriate.

### 4.4 CHAI RFQ Questions

Any questions or inquiries on the RFQ must be in writing and received prior to August 11, 2025 and directed to Ndunge Evelyn Pavao (CHAI Associate Director, Global Talent Acquisition) at [emwangi@clintonhealthaccess.org](mailto:emwangi@clintonhealthaccess.org). Any material questions that are received will be responded to via email. From the issuance date of the RFQ until award notice, vendors are not allowed to communicate with any of CHAI's staff or officials regarding this RFQ, except at the written direction of Ndunge Evelyn Pavao. *Any unauthorized contact may disqualify the vendor from consideration.*

### 4.5 Quote Submission

Quotes must be received by no later than the end of the business day on August, 15, 2025 and submitted to Ndunge Evelyn Pavao, CHAI Associate Director, Global Talent Acquisition at [emwangi@clintonhealthaccess.org](mailto:emwangi@clintonhealthaccess.org). Quote responses should *not be more than 10 pages* including appendices. All quotes received and not in conformity with the above requirements will not be considered. All offers must be valid for at least 90 days from the deadline of submission as CHAI will select the winning consultant within this period. Late submissions will not be acceptable for evaluation.

#### **4.6 Confidentiality**

All information presented in this RFQ, including any information that is subsequently disclosed by CHAI staff during the quote process (verbally and in writing), should be considered strictly confidential. Quote contents will be held strictly confidential by CHAI.

#### **4.7 Miscellaneous**

This RFQ does not convey a commitment to award a contract or to purchase services. CHAI reserves the right to accept or reject any or all quotes or to cancel this RFQ for any reason (stated and unstated). CHAI will not be liable under any circumstances for any expenses incurred by any bidder in connection with the selection process or any costs incurred in a consultant's preparation of its response. CHAI is not obligated to award to the least cost or any quote.

#### **4.8 Selection Criteria**

Any quote may be rejected if it is late, conditional, incomplete or deviates from the specifications in the RFQ. CHAI reserves the right to request additional information or discussion or presentation in support of the written quote. The CFO will review all quote submissions and make the final selection based upon feedback from the CHAI evaluation team, firm interviews and references.

### **5.0 Consultant Candidate Qualifications**

#### **5.1 Minimum Experience and Skills**

- BS in Business Management, Technology Management, Accounting, Finance or related field or 15+ years equivalent working experience
- Minimum of 10 years of professional experience with at least 7 years' experience in accounting and 3 years' experience in non-profit accounting
- A minimum of 8 years of related experience in Financial ERP systems implementation as a finance functional expert, with experience in international implementation
- Well-versed in finance business processes in sourcing, procurement, receivables, payables, travel expenses, and Accounting, as well as their interdependencies and how system solutions fit into the processes.
- Strong understanding of financial processes and US GAAP requirements
- Driven and self-motivated. Multi-tasking ability is essential to handle multiple priorities.
- Proven skills as a project manager on multiple full life cycle implementation
- Excellent project management and communication skills
- Experience working with stakeholders/partners at all levels, globally, across the organization
- Strong problem-solving and troubleshooting skills with the ability to exercise mature judgment
- Strong ability to collaborate, influence, and build consensus - addresses conflict and resolves issues
- Ability to build and foster strong working relationships while continuing to influence change.
- Ability to translate complex ideas into easy-to-understand concepts and articulate technical solutions
- Ability to drive performance improvement at the individual, team, and organizational levels, fostering a culture of adaptability, standardization, and continuous growth.
- Success in this role requires strong negotiation skills to achieve fair outcomes and advance shared goals
- Ability to communicate a compelling vision and demonstrate unwavering commitment to achieving results.
- Strong international non-profit ERP experience (donor, statutory) preferred, particularly in Africa or Southeast Asia
- High degree of diplomacy & prior experience working with teams globally/cross cultures
- Prior experience implementing all core accounting modules system across multiple global locations

#### **5.2 Preferred Consultant Credentials**

- Certified Public Accountant (CPA)
- NetSuite One World and NSPB experience in global locations and USG/USAID environments

#### **5.3 Skills and Experience**

- Minimum 10+ years direct experience in finance transformation for small to medium size businesses (in for-profit and non-profit organizations)
- Experience with 3+ Tier 1 or 2 enterprise system implementation project management
- Development of financial reporting strategy and finance transformation roadmaps
- Financial risk management consulting (i.e. compliance program design/implementation, Sarbanes-Oxley advisory, internal audit, etc.)
- Commercial Business Intelligence tools (dashboards, report writer, etc.) implementation
- Cross-functional project team management
- Internal accounting controls design and gap analysis of current to best accounting practices
- Accounting system best practice configuration (chart of accounts, inter-company, GL, labor distribution, revenue recognition, bank reconciliation, etc.)

#### 5.4 Logistics

- The consultant will work remote and report directly to the CFO and will be a member of the core project team (CFO, Chief of Staff, System Applications Lead).
- 5-10% travel to country locations may be required (T&E paid by CHAI net 30 upon trip completion)
- Contract duration expected to be 12-18 months subject to go-live assessment and final plan
- Consulting services billed based upon completion of key milestones (net 30).

## 6.0 Project Description

CHAI contracted with NetSuite Professional Services in 2021 to take over the system build from a prior boutique implementation firm. Initial roll-out to CHAI's 35 country offices was planned to be done in 3 phases but this will need to be re-evaluated. The project is approximately 40-50% into the implementation.

Discovery/requirements 70-80%

Baseline Build 40-50%

Phase 1 Train-The-Trainer (Super Users) Completed

Phase 1 Unit Testing (Super Users) Completed

End-To-End Business Scenario Testing Not Started

Phase 1 End User Training Not Started

Phase 1 End User Testing Not Started

Integration (payroll -50%, Concur -50%, corporate bank -90%)

Migration (master data and TB only) 50%

Phase 2 and 3 Implementation Not Started

We are an international NGO working in 40 countries in Africa and Asia and HQ in Boston, MA which requires frequent regular communication with African and Asian time zones in early morning or late night hours. HQ is currently on Unit4 Business World ERP and all countries are on QuickBooks desktop. Key modules role out includes the following:

#### Core Accounting Roll Out

One global COA for all countries. 7-10 countries have local COAs. AR, AP, Intercompany, Budgeting and Reporting Salary Allocations, Multi-Currency, Purchase Requisitions, Vendor Bill Payments (Manual, ACH Payment, Wire), Advanced Electronic Bank Payments, Fixed Assets Management, Employee Expenses, Revenue Recognition, Project Costing and Billing, Time sheets, Country VAT reporting, Fixed Assets

#### 3rd Party Integrations

Corporate bank interface (wire/ACH payment and bank statement), Local bank statement file import, Concur expense Domestic and international payroll file import and processing

#### User Base

Currently, 400 ERP and 200 NSPB users licenses but additional licenses will need to be assessed for full roll out to all locations.