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Request for Proposal for a
Enterprise Resource Planning System for:

Conservation Corps Minnesota & Iowa

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Project Overview

Introduction

Conservation Corps Minnesota & Iowa is in the process of evaluating and selecting the optimal enterprise resource planning (ERP) solution. Conservation Corps Minnesota & Iowa prides itself as a progressive organization that strives to apply efficient and accessible business and technology solutions to ensure accuracy and compliance in delivering services to maximize resources and further its mission.

Project Facilitation

The evaluation and selection process is being facilitated by the Conservation Corps Minnesota & Iowa’s selection team and the consulting resources within CliftonLarsonAllen LLP (CLA).

Project Organization

Conservation Corps Minnesota & Iowa has organized this project in a manner that solicited input from all levels within the organization. The evaluation, selection and implementation of an ERP system that allows for the proper recoding of transactions and user capability across the organization is supported by the Conservation Corps Minnesota & Iowa’s management team (Project Team) that has specific functional expertise and were accountable for approving the requirements outlined in this Request for Proposal (RFP).

Project Objective

Conservation Corps Minnesota & Iowa desires a fully integrated ERP solution for the requirements defined in the attached requirements document. Conservation Corps Minnesota & Iowa currently uses Great Plains (GP) and a series of non-integrated applications for its ERP and reporting needs. The current system is not meeting the increased demand for information sharing among multiple users and increased functional requirements.

Some of the specific issues that are motivating Conservation Corps Minnesota & Iowa to search for alternatives to the current financial management system include but are not limited to the following:

- Lack of integration capability with other systems
- Need for additional workflow automation, especially accounts payable and expense management
- Need for a robust grants and program management system

Functional Requirements

Specific requirements were documented for key functional areas of Conservation Corps Minnesota & Iowa’s organization. These requirements will be used as a basis of the evaluation and include the following:

Functional Areas to be Evaluated	
General Ledger	Accounts Receivable
Accounts Payable & Expense Management	Cash Management
Grant & Program Management	Project Management
Inventory & Fixed Assets	Budgeting and Planning



Anticipated Project Dates and Schedule

Anticipated Schedule	
Vendor Discovery Calls	March 17 – March 28, 2025
RFP Responses Due	April 18, 2025
Demo Scripts Issued	May 2, 2025
Demonstrations Completed	May 19 – May 23, 2025
Vendor Selection	June 6, 2025
Contracts Finalized	June 13, 2025
Begin Implementation	TBD



Client Profile

Overview

At Conservation Corps Minnesota & Iowa, youth and young adults grow as environmental stewards and leaders while giving back to the community through meaningful service. Conservation Corps Minnesota & Iowa, a 501(c)(3) nonprofit organization and AmeriCorps grantee, engages hundreds of youth and young adults each year in programs and initiatives that improve access to outdoor recreation, restore natural habitat, protect waterways, and respond to community needs and natural disasters.

All Conservation Corps programs devote 20 percent of program time to technical skills training, career-building skills such as resume writing and interviewing, and educational activities focused on environmental science and technology. Using scientific inquiry and experiential learning, Conservation Corps inspires youth and young adults to learn more about the world around them and think critically about the impact of their personal choices on the environment and their community.

- **Overview:** We operate five programs plus additional new initiatives. We have regional offices in two states and programming spanning the greater Midwest. We have approximately 42 employees, and we enroll roughly 450 program participants annually. Significant number of participants are AmeriCorps members.
- **Accounting System:** We are seeking to replace our current accounting system, GP, due to its scheduled phase-out. We are looking for a solution with enhanced accounting functions. This upgrade will ultimately lead to better reporting and improved grants management. Ideally the new system can integrate with Salesforce and Paycom.
- **Financial Snapshot:** We are a \$14m non-profit organization. 55% of revenue comes from partner support and earned revenue. 27% is from federal grants. 15% comes from state grants and 3% from foundation grants and individual contributions.

Systems Inventory

System	Vendor/System Name	Desired Action
Financial Management System	Great Plains	Replace
HRIS/Payroll	Paycom	Just converted to and will need integration or import/export file
Expense Management	Concur	Replace
Billing	Currently Salesforce “Band-Aid”	Replace
CRM	Salesforce	Keep in place
Budgeting Software	Excel	Replace
Reporting Software	Crystal report in GP	Replace
Grant Management	Instrumental – integrated with Salesforce in the future.	Keep in place



Proposal Instructions

Purpose of this RFP

The purpose of this Request for Proposal (RFP) is to formalize the selection and acquisition process for Conservation Corps Minnesota & Iowa to acquire and implement application software to satisfy the organization's information management requirements.

The vendor selected must be able to provide a solution that encompasses the implementation and training of the proposed alternative in addition to interfacing or replacing existing software applications that satisfy the information management requirements of the various entities. The vendor must also be able to provide a high level of service and support for all proposed components.

This RFP contains the functional requirements, technical specifications, and expectations for implementation, maintenance, and support. Instructions are provided to enable qualified vendors to prepare and submit proposals and supporting material in a format that will facilitate the evaluation process in a fair and consistent method.

Proprietary Information, Non-Disclosure

This document in its entirety remains the property of Conservation Corps Minnesota & Iowa. The information contained herein is proprietary to Conservation Corps Minnesota & Iowa. Conservation Corps Minnesota & Iowa documents may not be duplicated or disseminated outside of the vendor's organization without written authorization from Conservation Corps Minnesota & Iowa.

In addition, any information provided by vendor to Conservation Corps Minnesota & Iowa or its representatives will be used only for analysis purposes to evaluate and select an information management system. Information provided by vendor will not be duplicated or disseminated outside of Conservation Corps Minnesota & Iowa without written authorization from the vendor.

Representations Made by Vendor

By submitting a proposal, a vendor represents that:

- Vendor has read and understands this RFP and Vendor's response is made in agreement and compliance with the RFP.
- Vendor possesses the capabilities, equipment, personnel, and financial wherewithal to provide an efficient and successful implementation of solution, and to ensure continued maintenance and technical support services of the proposed system.
- The RFP response, pricing and demonstrations must be based upon current release and product version. If a new release is issued during the acquisition process, the vendor must submit a revised RFP response and pricing if the new version is to be considered by Conservation Corps Minnesota & Iowa.

Vendor Response

Vendors proposals will not be returned.

RFP responses should be delivered electronically to bin.zhu@conservationcorps.org by April 18, 2025, at 5:00 p.m. CST. Conservation Corps Minnesota & Iowa reserves the right to not consider proposals received after this date and time.



- PROPOSAL WORKBOOK: The Proposal Workbook is a Microsoft Excel workbook that contains tabs for proposal responses, as well as specific functional requirements identified by Conservation Corps Minnesota & Iowa. Please complete all tabs in the Proposal Workbook. Tabs include:
 - Vendor Profile
 - General Requirements
 - Client Functional Requirements
 - Cost Summary
- Feel free to include any additional information you would like considered

Evaluation Criteria

Conservation Corps Minnesota & Iowa has established criteria that will be used to evaluate each vendor's proposal. At a high-level the following evaluation categories have been defined:

- Software Features and Functionality as aligned with the requirements of Conservation Corps Minnesota & Iowa
- Implementation and Training Methodology
- Integrations
- Total Cost of Ownership



Cost Summary

Overview

Conservation Corps Minnesota & Iowa is requesting each vendor to submit complete pricing for all items related to the proposed system in a format that is easily interpreted and understood.

User Counts (Minimum):

Full Users: 5

Limited Users (Inquiry/Reporting/Dashboards): 40

Budget Users: 17

Initial Costs

In the Proposal Workbook, please provide an initial estimate of costs in Year 1.

Cost Summary

In the Proposal Workbook, please provide total costs for a five-year period. In addition, identify how costs are calculated (i.e., concurrent users, named users, etc.) Also, if discounts are available please describe how they are determined and applied.

