US Request for Proposals (RFP)

PF No. and Title: 2026-07-03 Human Resource Management System

RFP Issue Date: August 12, 2026

Proposal Submission Deadline: September 4, 2026 by 5:00 PM EST

Contractor: Helen Keller International (Helen Keller Intl)

Place of Performance: Remote

Contents of this Document

Bidders are encouraged to read this RFP and all attachments paying specific attention to the instructions and requirements. Issuance of this RFP does not in any way obligate Helen Keller International to award a contract, nor does it commit Helen Keller Intl to pay for costs incurred in the preparation and submission of a proposal. All recipients of this RFP shall treat all information and details included herein as private and confidential.

SECTION 1: Introduction and Eligibility

Introduction

Helen Keller International (Helen Keller Intl) is a nonprofit organization dedicated to saving and improving the sight and lives of the world's vulnerable by combatting the causes and consequences of blindness, poor health and malnutrition. Helen Keller Intl invites all eligible Bidders to submit proposals for a new Human Resources Management System (HRMS) to replace the existing NetSuite record system, with the objective of seamlessly transitioning our current HR records to the newly procured HRMS. We are looking for a system that helps us create an exceptional employee experience and minimize cumbersome manual processes. The selected platform must support Helen Keller Intl's complex global workforce operations across approximately 1,000 employees in 19 countries, with robust multi-currency, multi-language, and multi-jurisdiction payroll capabilities.

The purpose of this Request for Proposals (RFP) is to select a vendor that will provide best value to Helen Keller Intl, when both technical and cost factors are combined.

Eligibility of Bidders

This RFP is open to any entities that are deemed capable of implementing the scope of work, with a solid record of integrity and business ethics, and that meet the eligibility requirements stated in this Section.

Bidders that submit proposals in response to this RFP must meet the following requirements:

- Be a non-government entities (for-profit and non-profit companies, non-governmental organizations (NGOs), etc.) that are legally registered under the laws of the country where it is operating
- Have demonstrated capacity and expertise to successfully implement the Scope of Work
- Be willing to comply with relevant donor regulations and Helen Keller Intl requirements.

Note: Helen Keller Intl will not award a contract to any firm that is debarred, suspended, or proposed for debarment by the U.S. Government, or who proposes to do business with firms or firms' principals who are debarred, suspended, or proposed for debarment, in the performance of the requirement of this activity.

SECTION 2: Scope of Work

Helen Keller Intl will evaluate all proposals received in response to this RFP in accordance with the evaluation criteria below.

This RFP contains the following Annexes:

- Annex A: Conflict of Interest Disclosure
- Annex B: Vendor Data Security Questionnaire
- Annex C: Functional Requirements

Program Background

Helen Keller Intl is soliciting proposals from qualified Human Resource Management System (HRMS) vendors capable of delivering an integrated, cloud-based HR technology platform. This RFP is issued by the People & Culture unit and represents the culmination of a formal business case process.

The selected platform must support Helen Keller Intl's complex global workforce operations across approximately 1,000 employees in 19 countries, with robust multi-currency, multi-language, and multi-jurisdiction payroll capabilities.

Helen Keller Intl currently operates a fragmented HR technology environment consisting of:

- NetSuite for employee records
- Region-specific payroll solutions with limited integration
- Manual file uploads and reconciliation processes
- Standalone tools for recruiting, learning, benefits, and time tracking

This fragmented environment produces data duplication, payroll inaccuracies, compliance exposure, delayed reporting, and excessive manual workload for P&C and Finance teams. As Helen Keller Intl continues to expand its global operations, the current model presents unsustainable operational and compliance risk.

Helen Keller Intl is transitioning to a country-led operating model anchored by two regional Managing Directors responsible for West & Central Africa and East, Southern Africa & Asia respectively. A Centers of Excellence structure within People & Culture, Finance, IT, and Operations supports country offices. This restructuring increases the strategic importance of consolidated, real-time workforce data and standardized global HR processes.

As a US-registered INGO receiving significant US Government funding (CDC, and other institutional donors), Helen Keller Intl is subject to:

- US Federal Acquisition Regulations compliance requirements
- Fair Labor Standards Act (FLSA) compliance for US-based staff
- In-country labor law compliance across 19 jurisdictions
- GDPR and applicable data protection regulations
- Donor reporting requirements for labor cost allocation and grant management

The selected HRMS must support compliance tracking and reporting across this multi-regulatory landscape.

The workforce profile is as follows:

Workforce Attribute	Details
Total Employees (approximate)	~1,000
Countries of Operation	19 countries
Geographic Regions	West & Central Africa; East, Southern Africa & Asia; USA
Employment Types	Full-time, part-time, fixed-term, and project-based staff
Languages of Workforce	English, French, Portuguese and local languages
Payroll Currencies	USD, EUR, and local currencies across 19 jurisdictions
Current Financial ERP	NetSuite (existing; integration required)

The country where Helen Keller currently operates is:

Helen Keller Intl Country List			
Bangladesh	Burkina Faso	Cambodia	Cameroon
Cote d'Ivoire	DR Congo	Guinea	Kenya
Madagascar	Mali	Mozambique	Nepal
Niger	Nigeria	Philippines	Senegal
Sierra Leone	Tanzania	United States of America	

Scope of Work, Key Objectives and Activities

Helen Keller Intl seeks an HRMS solution that achieves the following strategic and operational objectives:

- Consolidate fragmented HR systems into a single integrated platform
- Eliminate manual data entry, file-based integrations, and reconciliation processes
- Ensure accurate, timely multi-country payroll processing with full compliance
- Enable employee and manager self-service at a global scale

- Provide real-time workforce, compensation, and grant-related labor data to leadership
- Support scalable HR operations as the organization grows and restructures
- Reduce P&C and Finance administrative burden, freeing capacity for strategic work
- Strengthen compliance with US and international labor regulations

The selected HRMS must integrate with or replace the following systems. Vendors must describe their integration approach, available APIs, and known limitations:

- **NetSuite ERP — bi-directional employee data and labor cost allocation**
  - Including whether a pre-built, supported NetSuite connector or a generic REST/SFTP bridge that Helen Keller Intl maintains is offered and iindicating sync direction per field, sync frequency (real-time vs batch), conflict-resolution rules when both systems edit the same record, and who owns the middleware.
  - Ability to integrate payroll entries into the NetSuite General Ledger module in the form of a journal entry or other transaction type
- **In-country payroll providers (where direct payroll is not handled natively)**
  - Please indicate which of our 19 countries have payroll handled natively versus which route to an in-country provider
    - For the provider countries, please name the specific partner and the integration method
- **Benefits carriers and third-party benefits administrators**
- **Single Sign-On (SSO) / Identity Provider**
- **Donor reporting and grant management systems**
- **Background screening and onboarding vendors**
- **Custom Objects & Data Model**
  - Vendor shall describe the platform's ability to create custom objects/entities beyond standard HR modules, without custom code.
  - Have ability to add custom fields (text, number, date, dropdown, lookup/relationship, formula, attachment) to both standard objects (employee, position, department) and custom objects.
  - Have support for object-to-object relationships (one-to-many, many-to-many) — e.g., linking an employee to multiple grants or programs.
  - Have ability to define field-level validation rules, required fields, and conditional field visibility (show/hide based on other field values).
  - Have support for custom picklists/dropdown values that admins can maintain without vendor involvement.
  - Have versioning or audit history at the field level (who changed what, when) for custom and standard fields.
  - Vendor shall specify any limits on number of custom objects, fields per object, or relationships, and any associated licensing tiers/costs.
- **Workflow Builder / Automation**
  - Have no-code/low-code workflow builder for approval chains (e.g., PTO requests, performance reviews, new hire onboarding) with support for multi-step, conditional, and parallel approvals.
  - Have ability to trigger workflows based on field changes, date-based events (e.g., anniversary, grant end date), or record creation.
  - Have support for automated notifications (email/SMS/in-app) tied to workflow steps, with customizable templates.
  - Have ability to build multi-stage onboarding/offboarding checklists with task assignment and due dates.
  - Have escalation rules (e.g., auto-reassign or notify supervisor if approval not actioned within X days).
  - Have workflow versioning and the ability to test/sandbox workflow changes before publishing to production.
  - Have reporting/visibility into workflow status (what's stuck, where, with whom) for admins.
  - Vendor shall describe whether workflow/automation features require a separate license tier, and any volume limits (e.g., number of active workflows, monthly automation runs).

The following are out of scope for this procurement unless explicitly proposed as value-added inclusions:

- Organization-wide ERP replacement (NetSuite will remain the financial system of record)
- Shared Services Center implementation (deferred to FY28)
- Standalone Learning Management System procurement

Vendors must confirm their ability to deliver all of the following core modules. Partial coverage must be clearly disclosed, with proposed integration pathways:

#	Module	Description
1	Core HR & Employee Records	Employee lifecycle, org hierarchy, multi-country/multi-type employment records, contract & document management, self-service portals
2	Recruitment, Hiring & Onboarding (ATS)	Full-cycle recruitment: requisitions, job posting, candidate screening/testing, interviews, offers, and onboarding through the first 90 days
3	Payroll	Multi-country, multi-currency payroll with statutory tax compliance, retro pay, payslips, and bank/reconciliation processing
4	Time & Labor	Time entry and approval with ability to allocate to multiple segments, (Subsidiary, Budget Center, Award, Initiative, Monitoring Code, Employee ID), leave management and accrual, grant/project time tracking, and FLSA overtime compliance
5	Benefits Administration	Country-specific benefits plans, open enrollment, life-event processing, carrier integrations, and ACA/COBRA/FMLA compliance
6	Performance Management	Configurable review cycles, goal cascading, 360 degree feedback, calibration, and development/improvement plans
7	Succession Planning	Critical-role identification, readiness ratings, succession scenario modeling, and links to performance/learning history
8	Compensation Management	Salary structures, merit/bonus planning, multi-currency compensation tracking, equity analysis, and total rewards statements
9	Learning Management & Development (LMS)	Course catalog, required-training tracking, SCORM content delivery, certifications, and mobile/offline learning
10	HR Analytics & Reporting	Real-time dashboards, standard and ad hoc reporting, grant labor cost reporting, and workforce forecasting
11	Compliance & Statutory Reporting	EEO-1/ACA/IRS statutory reporting, document retention, FMLA/ADA and GDPR compliance, and HIPAA support
12	Implementation, Data Migration & Support	Needs analysis, implementation planning, historical data migration/cleansing, and ongoing vendor support

#	Module	Description
13	Integrations	Connectivity to NetSuite, Active Directory/SSO, benefits carriers, REST APIs/webhooks/SFTP, and e-signature platforms
14	Technical - Architecture & Deployment	Cloud-native SaaS delivery, browser and native mobile access, uptime SLA, multi-region hosting, and no-code configuration
15	Security & Data Privacy	ISO 27001/SOC 2 compliance, encryption, RBAC, SSO/MFA, data residency, and audit logging
16	Global & Localization	Multi-language UI, local character/date formats, coverage across 19 countries + US, and configurable holiday calendars
17	Scalability & Performance	Page-load and concurrent-user performance benchmarks, scalability to 2,000+ employees, and offline/low-bandwidth mobile access

Deliverables and Illustrative Timeline
Helen Keller Intl anticipates a phased implementation over 9 to 12 months. Vendors must submit a proposed implementation plan that includes:

- Phase definitions with key deliverables, go-live milestones, and dependencies
- Country prioritization approach and recommended rollout sequence
- Data migration strategy for existing employee records from NetSuite and current systems
- Change management and communications support framework
- User acceptance testing (UAT) methodology
- Hypercare and post-go-live support model

Proposed Implementation Phasing

Phase	Timeline	Scope	Target Go-Live
1	Months 1–4	Core HR, Payroll (US + 2–3 priority countries), SSO, NetSuite integration	Month 4
2	Months 4–8	Remaining country payroll, Time & Labor, Benefits Administration	Month 8
3	Months 8–12	ATS, Performance Management, Compensation, Analytics, L&D	Month 12

Vendors are encouraged to propose alternative phasing if it better optimizes risk management or total cost of ownership.

Helen Keller Intl Resource Commitments

Helen Keller Intl will dedicate the following internal resources to the implementation:

- P&C project lead (full-time equivalent during implementation)
- IT representative for integrations and technical architecture
- Finance representative for payroll and NetSuite integration
- Country-level HR focal points for data validation and UAT
- Senior P&C leadership for governance and decision-making

Data Migration Requirements

Vendors must describe their approach to migrating the following data categories from existing systems:

- Active employee records from NetSuite
- Historical payroll data (minimum 3 years) specifying the migration format accepted, how many mock/trial loads are included
- Leave balances and accrual history
- Organizational structure and reporting hierarchies
- Historical performance review data where available in digital format

Training Requirements

Vendors must provide a comprehensive training plan covering:

- System administrator and P&C super-user training
- Manager training for self-service and approval workflows
- Employee self-service orientation, delivered virtually and accessible globally
- Country HR coordinator training by region
- All training materials available in English and French

Anticipated Contracting Period and Award Mechanism

The anticipated period of performance is expected to be 9-12 months beginning on or about October 2026.

Helen Keller Intl intends to award a firm fixed price Professional Services Contract to the winning offer. No profit, fees, taxes, or additional costs may be added after award.

The contract will consist of:

- Master Subscription Agreement (MSA) covering software licensing and SaaS terms
- Statement of Work (SOW) for implementation services
- Data Processing Agreement (DPA) covering GDPR and data protection obligations
- Service Level Agreement (SLA) defining uptime, support, and response time commitments

Required SLA Commitments

SLA Metric	Minimum Requirement	Preferred
Platform Uptime	99.9% monthly	99.95% monthly
Planned Maintenance Notice	5 business days advance notice	10 business days
Critical Issue Response (P1)	Within 1 hour	Within 30 minutes
High Priority Issue (P2)	Within 4 hours	Within 2 hours
Standard Issue Resolution (P3)	Within 2 business days	Within 1 business day
Data Backup Frequency	Daily	Continuous / real-time
Recovery Time Objective (RTO)	4 hours	2 hours
Recovery Point Objective (RPO)	24 hours	4 hours

Data Ownership and Portability

Helen Keller Intl must retain full ownership of all data entered into the platform at all times. Vendors must:

- Provide full data export in standard formats (CSV, JSON, XML) on request at any time including all modules, historical records, attachments/documents (contracts, payslips), audit logs, and the data schema/dictionary
- Deliver a complete data extract within 30 days of contract termination

- Not use Helen Keller Intl data for training AI or ML models or any commercial purpose including but not limited to no use of our data for training, fine-tuning, or improving any model, including via sub-processors and including de-identified or aggregated data
- Purge all Helen Keller Intl data within 90 days of contract end, with written certification

SECTION 3: Proposal Instructions
The Bidder's proposal will consist of two separate documents:

Part 1 - Technical Offer
Part 2 – Financial Offer

The Technical Offer and the Financial Offer (altogether "proposal") must be submitted separately. The Bidder should not include any cost data in the Technical Offer.

The proposal should explain in detail the Bidder's availability, experience and resources to provide the requested services.

The Proposal must be submitted with a **Cover Letter** which must include the following information and must be signed and stamped by an authorized representative of the Bidder organization:

- Date of Submission of the Proposal
- Term of proposal validity (minimum 180 days)
- Full Legal Name of the company/organization
- Name and title of authorized representative of organization
- Type of company/organization
- Address, Telephone, E-mail
- Taxpayer Identification Number
- Other required documents that shall be included as attachments to the cover letter:
  - Copy of registration or incorporation where the bidder is registered.

Bidders must also submit the signed Conflict of Interest Declaration Form (Annex A). This form will be assessed to establish whether the Bidder has any present or potential future conflict of interest according to the definition in Annex A. Failure to accurately complete the Conflict of Interest Declaration Form may lead to the rejection of the submitted proposal.

Proposals that are incomplete or do not address these criteria may not be considered in the review process.

Part 1: TECHNICAL OFFER
The Technical Offer should be in the English language, typed in Microsoft Word, single-spaced, with each page numbered consecutively. A maximum number of pages for each component of the Technical Offer is given below.

The Technical Offer should include the following:

1) Bidder past performance record/relevant experience– 2 pages maximum
Information related to Bidder's past performance/prior experience in conducting work in the country/region similar in nature and volume to the services requested (brief description, deliverables, date, client etc.).

Vendors must meet all of the following minimum requirements to be considered for evaluation:
1. Minimum 5 years of experience delivering HRMS solutions to global organizations
2. Active client base of at least 3 INGOs, NGOs, or non-profit organizations with multi-country operations
3. Demonstrated payroll capability in at least 15 of Helen Keller Intl's 19 operating countries
4. SOC 2 Type II certification current within the last 12 months
5. US-based support resources or equivalent coverage aligned to EST/UTC time zones

The following qualifications are preferred:

- Prior experience with USAID-funded organizations and grant labor reporting requirements
- Existing pre-built integration connector for NetSuite indicating the exact SuiteApp or integration partner
- Named INGO or international development sector clients with similar workforce profiles
- Dedicated non-profit or INGO industry practice or customer success team
- Experience supporting FLSA reclassification compliance and remediation

Bidders must also provide contacts for at least three (3) professional references for previous work under similar SOWs. Contact information should include, at a minimum: name of individual and company, brief information on relationship to Bidder, address, email, and phone number. Helen Keller Intl reserves the right to contact any and all references provided. Contact information for references is not subject to the page limitation for this section.

2) **Technical approach –** {5} **pages maximum**
The technical approach must describe the proposed approach to achieving the program objectives and must address the following:

- Information as to whether the Bidder currently has a presence in the country/region, and the nature of this presence.
- A brief description of the Bidder's understanding of the objectives and scope of work for the consultancy.
- An overview as to how the Bidder would propose to complete the requested services indicated in this RFP.
- Vendor Data Security Questionnaire (Annex B)
- Functional Requirements Matrix (Annex C)

Part 2: FINANCIAL OFFER

This contract will be issued as a firm fixed price contract with payments made against deliverables. Helen Keller Intl will only issue payment via electronic payment methods and all bank accounts must be in the name of the company/organization only.

As part of the Financial Offer, Bidders must include a detailed budget, submitted in Microsoft Excel, expressed in USD, with an accompanying budget narrative, submitted in Microsoft Word, describing the basis for the listed cost elements. Supporting information should be provided in sufficient detail to allow a complete analysis and determination of reasonableness of each cost element. Bidders are required to include and clearly label **<u>all</u>** costs deemed necessary to complete the work.

The Financial Offer must include the following:

1. Labor Cost: The Bidder must provide information related to team structure, daily rates and Level of Effort (LoE) (measured in days) for the deliverables listed. Please state assumptions made when submitting the cost information including any additional options and stating all conditions.

2. Other Direct Costs: The Bidder should provide a breakdown estimate of other direct costs which are considered necessary for completion of the work. Other direct costs will cover transportation costs, visa, and per diem. Any other direct costs shall be agreed prior with Helen Keller Intl.

3. Indirect Rates and Fixed Fee: If it is a Bidder's regular practice to budget indirect rates, e.g. overhead, fringe, G&A, administrative, or other rate, Bidders must explain the rates and the rates' base of application in the budget narrative. Helen Keller Intl reserves the right to request additional information to substantiate a Bidder's indirect rates. Proposed fixed fee must also be explained in the budget narrative and represented as a separate line item in the budget.

Vendors must provide itemized, transparent pricing structured as follows:

- Per employee per month (PEPM) subscription fee, itemized by module
- One-time implementation and data migration costs, broken down by phase
- Integration costs: NetSuite, SSO, benefits carriers, and any other connectors
- Training and change management costs

- Ongoing support and maintenance costs for Years 1 through 3

Any additional costs not covered above, including add-on modules or additional countries

Proposals must also include: (a) a 3-year total cost of ownership (TCO) summary; (b) any available volume or non-profit discounts; and (c) pricing protections or caps on annual fee increases.

Vendors are expected to provide:
- Annual price increase caps not exceeding CPI or 5%, whichever is lower
- Pricing locks for a minimum of 3 years for contracted modules
- No additional per-country fees beyond the agreed PEPM rate for countries within the scope of this RFP

SECTION 4: Evaluation Criteria and Award

Helen Keller Intl will follow a Best Value Trade-Off selection methodology. Helen Keller Intl may award to a firm whose proposal is most advantageous, with price and other factors considered. Bidders may not modify non-responsive offers after the proposal deadline in order to make them responsive. However, Helen Keller Intl may request a Bidder to clarify its offer as long as no material deviation exists.

The criteria below is the anticipated basis for evaluation. Selection will be based principally on the proposal technical merits, but price and other factors will be considered, and award will be made only if the proposal is determined to be technically acceptable and cost reasonable.

Evaluation Criteria	Total Max Points
Past Performance/ Prior relevant experience	**25**
Minimum 5 years of experience delivering HRMS solutions to global organizations	*5*
Active client base of at least 3 INGOs, NGOs, or non-profit organizations with multi-country operations	*5*
Demonstrated payroll capability in at least 15 of Helen Keller Intl's 19 operating countries	*5*
Prior experience with USAID-funded organizations and grant labor reporting requirements	*5*
Experience supporting FLSA reclassification compliance and remediation	*5*
Technical Merit	**55**
Existing pre-built integration connector for NetSuite	*5*
Functional Coverage: ability to meet all required modules and requirements	*25*
Global Payroll Capability: multi-country, multi-currency in Helen Keller Intl's countries	*10*
Technical Architecture, Security, and Compliance (SOC 2, ISO, GDPR, data residency)	*15*
Operational Capability	**20**
US-based support resources or equivalent coverage aligned to EST/UTC time zones	5
Dedicated non-profit or INGO industry practice or customer success team	5
Implementation Approach, Timeline, and Risk Management	*10*
Total Points	**100**

Upon completion of the evaluation of Technical Offers, Helen Keller Intl will evaluate Financial Offers for budget presentation, details of the budget narrative, and cost effectiveness (reasonable, realistic, match the Technical Offer and meet requirements of RFP). No points are assigned to Financial Offers, but these criteria will be considered, in conjunction with the total score of the Technical Offer.

Shortlisted vendors will be invited to present a live platform demonstration. Helen Keller Intl will provide a scenario-based demonstration script in advance. Demonstrations will be scored as part of the final evaluation.

SECTION 5: Proposal Validity, Submission Deadline and Instructions
Proposals should have a 180-day validity period from the proposal submission date.

Proposals must be submitted electronically by the deadline listed on the cover page of this RFP by E-mail to HRMSprocurement@hki.org indicating in the subject line of the e-mail the company name and the RFP number.

A full proposal submission will include the following documents:
- Cover Letter
- Technical Offer
- Financial Offer
- Conflict of Interest Disclosure Form
- Other Annexes as listed above
- Copies of Bidder legal registration documents, as applicable
- Other pertinent information relevant to the proposal submission

Bidder Questions: No verbal questions will be taken in person or via telephone. However, Helen Keller Intl will take written questions about this RFP until the closing date. Any questions related to this RFP should be addressed to HRMSprocurement@hki.org. In order to ensure fairness, Helen Keller Intl's responses will be communicated to all potential Bidders, ensuring the original requestor's anonymity.

SECTION 6: Negotiations
Best offer proposals are requested and it is anticipated that an award will be made on the basis of the original offers received. However, Helen Keller Intl reserves the right to conduct discussions, negotiations and/or request clarifications prior to awarding a contract. Furthermore, Helen Keller Intl reserves the right to conduct a competitive range and to limit the number of bidders in the competitive range to permit an efficient evaluation environment among the most highly-rated proposals. Highest-rated bidders, as determined by the technical evaluation committee, may be asked to submit their best prices or technical responses during a competitive range. At the sole discretion of Helen Keller Intl, bidders may be requested to conduct oral presentations. Helen Keller Intl reserves the right to make separate awards per component or to make no award at all.

SECTION 7: Terms of the Solicitation
1. Issuance of this RFP does not constitute an award commitment on the part of Helen Keller Intl, nor does it commit Helen Keller Intl to pay for costs incurred in the preparation and submission of a bid.

2. Attached files are an integral part of this RFP.

3. Helen Keller Intl may contact Bidders to confirm contact person, address, bid amount and to confirm that the proposal was submitted for this solicitation.

4. False Statements: Bidders must provide full, accurate and complete information as required by this solicitation and its attachments.

5. Conflict of Interest Disclosure: In Annex A Bidders must provide disclosure of any past, present or future relationships with any parties associated with the issuance, review or management of this solicitation and anticipated award. Failure to provide full and open disclosure may result in Helen Keller Intl having to re-evaluate selection of a potential Bidders.

6. Right to Select/Reject: Helen Keller Intl reserves the right to select and negotiate with those firms it determines, in its sole discretion, to be qualified for competitive proposals and to terminate negotiations without incurring any liability. Helen Keller Intl also reserves the right to reject any or all proposals received without explanation.

7. Reserved rights: All RFP responses become the property of Helen Keller Intl and Helen Keller Intl reserves the right in its sole discretion to:
   a. To disqualify any offer based on Bidder's failure to follow solicitation instructions;
   b. To waive any deviations by Bidders from the requirements of this solicitation that in Helen Keller Intl's opinion are considered not to be material defects requiring rejection or disqualification or where such a waiver will promote increased competition;
   c. Extend the time for submission of all RFP responses after notification to all Bidders;
   d. Terminate or modify the RFP process at any time and re-issue the RFP to whomever Helen Keller Intl deems appropriate;
   e. Issue an award based on the initial evaluation of offers without discussion;
   f. Award only part of the activities in the solicitation or issue multiple awards based on solicitation activities.

8. Bidders and its proposed personnel shall disclose any factors that could limit the organization's ability to independently perform the services such as relationship with counterpart employees, past employment, etc.

ANNEX A: Conflict of Interest Disclosure

Helen Keller Intl Code of Conduct & Ethics Policy: In accordance with the Helen Keller Intl Code of Conduct and Ethics Policy, Helen Keller Intl requires full and open disclosure when dealing with procurement. As such, Helen Keller Intl employees must avoid any conflict of interest or the appearance of a conflict of interest. Helen Keller Intl employees must at all times provide full disclosure of their actions or relationships with prospective vendors, contractors, or consultants. Helen Keller Intl employees shall not solicit, request, accept, or agree to accept any gift from a vendor or prospective vendor.

Helen Keller Intl reserves the right to reject any or all quotes when considered to be in the best interest of the organization and/or the people it serves. All parties submitting a proposal in response to this Request for Proposal are obligated to disclose the existence of any actual or possible conflict of interest relating to every country included within their proposal in the attached *Conflict of Interest Declaration Form*.

Failure to fully disclose such information could lead Helen Keller Intl to reject a proposal. If a party has no conflict to declare for any of the countries covered in their proposal, they may submit one form, listing all of the countries covered.

"**Conflict of Interest**" means a situation in which an Bidder, or an Affiliate (as defined below), or a sub-contractor (if any) of an Bidder, has interests (financial, organizational, personal, reputational or otherwise) that would or may appear to make it difficult for an Bidder to fulfill its obligations to Helen Keller Intl in its role as the vendor in an objective, independent and professional manner, or a situation in which it is reasonable to foresee that such an interest would arise. A Conflict of Interest may arise in the following circumstances, which are not exhaustive:

- a Bidder has been, or is involved in the design of a proposal or request for funding that has been, or will be submitted to Helen Keller Intl;
- a Bidder has been, or is involved in the provision of advice to an entity that is a Principal Recipient or a Sub-recipient;
- a Bidder has been, or is involved in, or has provided advice in relation to the procurement of goods and/or services by a Principal Recipient and/or a Sub-recipient;
- a Bidder has been, or is involved in the provision of auditing services to a Principal Recipient and/or a Sub-recipient; or
- a Bidder has submitted an expression of interest, tender, bid or otherwise indicated interest in providing services of any nature to a Principal Recipient or a Sub-recipient that remains valid at the time of, and for the duration of the term of this Contract.

"**Affiliate**" means a business concern, individual or other entity that, directly or indirectly: (i) controls or can control a Bidder; (ii) is controlled by, or can foreseeably be controlled by, a Bidder; or (iii) along with a Bidder, is controlled by, or can foreseeably be controlled by, the same third party.

Bidder Conflict of Interest Declaration Form
Please check <u>one</u> box below, as appropriate:

☐	The Bidder hereby declares that it has read, understood and agrees to comply with the Conflict of Interest rules set forth in the Request for Proposals (RFP) and warrants that no Conflict of Interest exists on the part of the Bidder or an Affiliate of the Bidder, with regard to the services to be performed under the RFP.
☐	The Bidder wishes to disclose a real or potential Conflict of Interest situation(s) and propose mitigating action(s). *Note:* if this box is checked, please describe in an attachment, *in detail*, the situation and present a proposed mitigation plan / arrangement for consideration by Helen Keller Intl.

Bidder:

Signature:	
Printed Name:	
Title:	
Date:	

Annex B: Vendor Data Security Questionnaire

HELEN KELLER INTERNATIONAL

Vendor Data Security Questionnaire

Standard Version

Version 2.0

PURPOSE

This questionnaire is used by Helen Keller Intl to assess the data security posture of vendors prior to entering into a formal agreement. Your responses will inform Helen Keller's decision to proceed with the engagement and will be used to customize the Data Processing Agreement (DPA) that governs how your organization handles Helen Keller data. Please respond to all questions honestly and completely.

INSTRUCTIONS FOR VENDORS

- Complete all sections of this questionnaire fully and accurately. Incomplete responses may delay the review process.
- For Yes/No questions, mark the appropriate response: Yes, No, or Partial / In Progress. A written comment is REQUIRED for any response marked No or Partial / In Progress — use the Notes / Comments column to explain the situation or describe any compensating controls in place.
- For descriptive questions (shaded in light purple), provide a written response in the space below the question. Where a detailed written response is not practical, you may provide a link to publicly accessible or shareable documentation — such as a published privacy policy, security overview, audit report, or compliance certification — provided the linked resource is current and directly responsive to the question.
- Where questions refer to a Data Processing Agreement (DPA) section (e.g., [DPA §G]), this indicates the corresponding provision in the Helen Keller DPA that the question supports.
- For Section 6 (Sub-Processors), list ALL third-party services or platforms that will have any access to Helen Keller data, including cloud storage, hosting, analytics, or AI tools.
- Return the completed questionnaire to the Helen Keller contact identified in the agreement or procurement process.
- The completed questionnaire is confidential and will be used solely for the purpose of assessing vendor data security and informing the Data Processing Agreement.

Questions about this questionnaire may be directed to the Helen Keller contact identified in the agreement or procurement process.

VENDOR INFORMATION

Vendor / Company Name	
Mailing Address	
Completed By (Name & Title)	
Email Address	
Date Completed	

Helen Keller Contract / Agreement Reference	

Response Key:

☐ **Yes** ☐ **No** ☐ **Partial / In Progress**

A comment is REQUIRED for any response marked No or Partial / In Progress. For descriptive questions (shaded in light purple), provide a written response or a link to current, relevant documentation. References in brackets (e.g., [DPA §G]) indicate the relevant section of the Helen Keller Data Processing Agreement.

SECTION 1 — Vendor Profile & Data Context

1.1. Describe the types of Helen Keller Intl data this engagement will involve: [DPA §D] e.g., staff PII, beneficiary / program data, health data (PHI), financial data, donor data, research data				
Data types and approximate volume:				
1.2. Does the vendor use AI tools or automated processing systems in connection with any Helen Keller data? [DPA §D] If yes, identify the tools and describe how Helen Keller data is processed	☐	☐	☐	
AI / automated processing tools and description (if applicable):				
1.3. Will Helen Keller data be stored or processed in, or transferred to, a country other than where it is originally collected? [DPA §E] Cross-border transfers may trigger GDPR, POPIA, or other data protection obligations	☐	☐	☐	
Transfer destination(s) and legal basis for transfer (e.g., Standard Contractual Clauses, adequacy decision):				
1.4. Does the vendor operate across multiple countries or jurisdictions in connection with services provided to Helen Keller? [DPA §E] If yes, list the relevant countries or regions	☐	☐	☐	
Countries / regions (if applicable):				

SECTION 2 — Regulatory Compliance & Certifications

Question	Yes	No	Partial / In Progress	Notes / Comments (Required if No or Partial)

2.1. Does the vendor conduct all data processing activities in full compliance with the data protection and privacy laws applicable in the jurisdictions where the vendor operates and where Helen Keller data is collected or stored? [DPA §E]	☐	☐	☐	
2.2. List the specific data protection laws, regulations, or frameworks the vendor is subject to and complies with: [DPA §E] e.g., GDPR (EU/EEA), POPIA (South Africa), NDPR (Nigeria), PDPA (Thailand / Bangladesh), HIPAA (United States), or other applicable national or regional frameworks				
Applicable regulations and compliance approach:				
2.3. Where the vendor processes data on behalf of Helen Keller that is subject to a specific regulatory framework (e.g., health data, data of EU residents), does the vendor have documented procedures to meet the obligations of that framework? [DPA §E] If yes, briefly describe or provide a link to relevant documentation	☐	☐	☐	
Describe applicable frameworks and documented procedures, or provide a link:				
2.4. Does the vendor hold a current SOC 2 Type II certification or equivalent, or has an independent security audit been conducted within the last 2 years? [DPA §G]	☐	☐	☐	
Certification type, scope, and date. Vendor agrees to provide the report upon request, or provide a link to publicly available documentation:				
2.5. Does the vendor carry cyber liability insurance? [DPA §G]	☐	☐	☐	
Coverage type and limit (e.g., $2M cyber liability):				

SECTION 3 — Data Handling Practices

Question	Yes	No	Partial / In Progress	Notes / Comments (Required if No or Partial)
3.1. Does the vendor have documented policies or standard operating procedures (SOPs) covering the collection, storage, use, sharing, retention, and destruction of personal data? [DPA §C, G]	☐	☐	☐	
Briefly describe, or provide a link to relevant policy documentation:				

3.2. Does the vendor have and follow a documented data retention and deletion schedule? [DPA §I] The vendor must be able to return or delete all Helen Keller data upon termination of the agreement	☐	☐	☐	
3.3. Upon termination of the agreement, can the vendor securely return or destroy all copies of Helen Keller data within a defined timeframe? [DPA §I]	☐	☐	☐	
Describe the return / destruction process and timeline:				

SECTION 4 — Access & Identity Controls

Question	Yes	No	Partial / In Progress	Notes / Comments (Required if No or Partial)
4.1. Does the vendor use multi-factor authentication (MFA) for all systems that store or process Helen Keller data? [DPA §G]	☐	☐	☐	
4.2. Does the vendor enforce role-based access controls, limiting access to Helen Keller data to only those staff who require it for their duties? [DPA §C, G]	☐	☐	☐	
4.3. Does the vendor have documented onboarding and offboarding processes that include timely revocation of access to Helen Keller data? [DPA §C, G]	☐	☐	☐	
Describe access revocation timeline and process:				
4.4. Does the vendor conduct background or reference checks on personnel who will have access to Helen Keller data? [DPA §C]	☐	☐	☐	
4.5. Does the vendor conduct periodic access reviews to identify and remove unnecessary access to Helen Keller data? [DPA §C, G]	☐	☐	☐	
Describe review frequency and process:				

SECTION 5 — Technical Security Controls

Question	Yes	No	Partial / In Progress	Notes / Comments (Required if No or Partial)
5.1. Does the vendor encrypt Helen Keller data at rest and in transit using current industry-standard encryption? [DPA §G] e.g., AES-256 at rest; TLS 1.2 or higher in transit	☐	☐	☐	
Describe encryption standards used, or provide a link to relevant documentation:				
5.2. Does the vendor implement and maintain malware and endpoint protection on all systems used to process Helen Keller data? [DPA §G]	☐	☐	☐	
5.3. Does the vendor conduct regular vulnerability assessments or penetration testing specifically covering the systems and environments that store, process, or transmit Helen Keller data? [DPA §G]	☐	☐	☐	
Describe frequency, scope, and date of most recent assessment:				
5.4. Does the vendor maintain data backup and restoration procedures to ensure Helen Keller data can be recovered in the event of an incident? [DPA §G]	☐	☐	☐	
Describe backup frequency, method, and recovery time objective (RTO), or provide a link:				
5.5. Does the vendor have a process for identifying, tracking, and remediating security vulnerabilities in a timely manner? [DPA §G]	☐	☐	☐	
Briefly describe the vulnerability management process, or provide a link:				

SECTION 6 — Sub-Processors & Third-Party Services

Question	Yes	No	Partial / In Progress	Notes / Comments (Required if No or Partial)
6.1. Does the vendor use any sub-processors or third-party services that will store, access, or process Helen Keller data? [DPA §C, E] This includes cloud hosting providers, analytics platforms, AI tools, CRM systems, or any other service with access to Helen Keller data. Helen Keller must approve any sub-processors before engagement.	☐	☐	☐	

List all sub-processors below (add rows as needed):

Sub-Processor Name	Data Processing Role	Data Location / Region

6.2. Does the vendor have written data processing agreements with each sub-processor listed above that impose data protection obligations equivalent to those in the Helen Keller Data Processing Agreement? [DPA §C]	☐	☐	☐	
6.3. Will the vendor notify Helen Keller in writing before engaging any new or replacement sub-processor? [DPA §E]	☐	☐	☐	

SECTION 7 — Incident Detection & Response

Question	Yes	No	Partial / In Progress	Notes / Comments (Required if No or Partial)
7.1. Does the vendor have documented incident response procedures covering detection, containment, notification, and recovery? [DPA §H]	☐	☐	☐	
Briefly describe the incident response process, or provide a link to relevant documentation:				
7.2. In the event of a confirmed or suspected data breach involving Helen Keller data, will the vendor notify Helen Keller without undue delay and within 72 hours of discovery? [DPA §H]	☐	☐	☐	
Describe breach notification process and identify the primary contact for notifications:				
7.3. Does the vendor have the technical capability to detect unauthorized access to or exfiltration of data? [DPA §H] e.g., SIEM tools, anomaly detection, audit logging	☐	☐	☐	
7.4. Does the vendor preserve evidence and maintain audit logs sufficient for forensic investigation following a security incident? [DPA §H]	☐	☐	☐	
Describe log retention policy and duration:				

SECTION 8 — Governance & Staff Training

Question	Yes	No	Partial / In Progress	Notes / Comments (Required if No or Partial)
8.1. Has the vendor designated a Data Protection Officer (DPO) or equivalent individual responsible for data security compliance? [DPA §C]	☐	☐	☐	
Name, title, and contact information of DPO or equivalent:				
8.2. Does the vendor require mandatory data security and privacy training for all staff who process personal data? [DPA §C]	☐	☐	☐	
Describe training program and frequency, or provide a link. Indicate whether completion is tracked:				
8.3. Does the vendor have a process for staff to report suspected security incidents or policy violations? [DPA §H]	☐	☐	☐	
8.4. Does the vendor maintain and regularly review a formal Information Security Policy? [DPA §C]	☐	☐	☐	
Date of most recent policy review, or provide a link to the policy:				

VENDOR ATTESTATION

The undersigned authorized representative of the Vendor certifies that the responses provided in this questionnaire are accurate and complete to the best of their knowledge, and that the Vendor will maintain the data security controls described herein throughout the term of the agreement with Helen Keller Intl. The Vendor acknowledges that material misrepresentations in this questionnaire may constitute a breach of the Data Processing Agreement.

Vendor Authorized Representative	Helen Keller Intl Representative
Signature: ____________________	Signature: ____________________
Name: ____________________	Name: ____________________
Title: ____________________	Title: ____________________
Date: ____________________	Date: ____________________

Annex C: Functional Requirements

Vendors must respond to each requirement using the following codes in the Vendor Response column and provide a comment for all answers not marked S:

- S = Standard (available out-of-the-box)
- C = Configurable (available through configuration, no custom development)
- D = Development Required (available through custom development)
- P = Planned (on roadmap within 12 months)
- N = Not Available

*M = Mandatory | D = Desirable

Ref	Requirement	Category	M/D*	Vendor Response	Vendor Comment
Core HR					
CHR-01	Maintain complete employee records (personal, employment, and contract data), eligibility to be rehired , probation period tracking	Core HR	**M**		
CHR-02	Support multiple employment types: full-time, part-time, fixed-term, project-based, seasonal, intern, volunteer)	Core HR	**M**		
CHR-03	Manage organizational hierarchy with multi-level reporting structures	Core HR	**M**		
CHR-04	Support concurrent employment across multiple countries / cost centers	Core HR	**M**		
CHR-05	Document management: store offer letters, employment agreements, contracts, job letters, certifications	Core HR	**M**		
CHR-06	Standard job descriptions with associated competencies	Core HR	**M**		
CHR-07	Effective-dated tracking of positions, compensation, and promotions	Core HR	**M**		
CHR-08	Automated employee lifecycle workflows: onboarding, transfers, promotions, exits	Core HR	**M**		
CHR-09	Country-specific mandatory data capture fields by jurisdiction	Core HR	**M**		

Ref	Requirement	Category	M/D*	Vendor Response	Vendor Comment
CHR-10	Position management with headcount budgeting and vacancy tracking	Core HR	**M**		
CHR-11	Track hire/termination dates + notify when records retention period expires for terminated employees	Core HR	**M**		
CHR-12	Repository for performance issues incl. PIPs and suspensions	Core HR	**M**		
CHR-13	Full audit trail and change history for all employee record modifications	Core HR	**M**		
CHR-14	UI available in multiple languages (minimum English and French)	Core HR	**M**		
CHR-15	Service Request Hub	Core HR	**M**		
CHR-16	Employee Self Service	Core HR	**M**		
CHR-17	Team Dashboard showing members, calendars, etc.	Core HR	**D**		
CHR-18	Manager Self Service	Core HR	**M**		
CHR-19	Fixed-term contract end-date alerts and renewal/extension workflows	Core HR	**M**		
CHR-20	Bulk transaction processing (mass updates for annual increases, performance review, and other)	Core HR	**M**		
CHR-21	Auto-generated org chart visualization and export	Core HR	**D**		
CHR-22	Exit clearance checklists and exit interviews	Core HR	**D**		
CHR-23	I9 feature that is completed and filed/retained as appropriate, for US staff	Core HR	**M**		

Ref	Requirement	Category	M/D*	Vendor Response	Vendor Comment
Recruitment (ATS)					
REC-01	Job requisition creation and approval workflows to include not just setting up the recruitment, but also moving it forward to candidate selection	Recruitment (ATS)	**M**		
REC-02	Integration into core records to track rehires	Recruitment (ATS)	**M**		
REC-03	Submit applications online into ATS	Recruitment (ATS)	**M**		
REC-04	Ability to set up tests for candidates	Recruitment (ATS)	**D**		
REC-05	Internal/external job posting with career site and job-board integration	Recruitment (ATS)	**M**		
REC-06	Candidate filtering by screening questions set up in system as part of candidate application	Recruitment (ATS)	**M**		
REC-07	Resume/CV collection, candidate filtering, and downloadable CVs	Recruitment (ATS)	**M**		
REC-08	Candidate tracking through configurable recruitment pipeline stages	Recruitment (ATS)	**M**		
REC-09	Document management: interview notes and preselection minutes , justification of selection, reference check notes and COIs	Recruitment (ATS)	**M**		
REC-10	COI signing by interview panels and candidates and recruitment Panel TOR Reading and Justification for selection	Recruitment (ATS)	**M**		
REC-11	Interview scheduling, evaluation forms, and hiring-panel collaboration	Recruitment (ATS)	**M**		
REC-12	In-system candidate communications with full tracking; complete candidate records	Recruitment (ATS)	**M**		

Ref	Requirement	Category	M/D*	Vendor Response	Vendor Comment
REC-13	Custom candidate flows, automated follow-ups, and system notifications - (includes auto reply when candidate applies to a job)	Recruitment (ATS)	**M**		
REC-14	Batch processing of candidates	Recruitment (ATS)	**M**		
REC-15	Manage reference checks within system and save information	Recruitment (ATS)	**M**		
REC-16	Manage background checks and save information (CSI)	Recruitment (ATS)	**M**		
REC-17	Offer letter generation and electronic acceptance	Recruitment (ATS)	**M**		
REC-18	Seamless conversion of hired candidates to Core HR records	Recruitment (ATS)	**M**		
REC-19	Onboarding plans and tracking for the first 90 days, incl. completion / remaining items and a letter of completion of 90 day probationary period	Recruitment (ATS)	**M**		
REC-20	Dashboards / analytics on requisitions and outreach; time-to-fill and headcount reporting	Recruitment (ATS)	**M**		
REC-21	Diversity / EEO tracking incl. Veteran Status, Disability, Religion, and demographics per each country's legal requirements	Recruitment (ATS)	**M**		
REC-22	Integration with background-screening vendors	Recruitment (ATS)	**M**		
REC-23	Potential future AI integrations for candidate management	Recruitment (ATS)	**M**		
Payroll					
PAY-01	Native or API-fed payroll covering 100% of staff in 100% of covered countries (tool of record)	Payroll	**M**		
PAY-02	Timely, accurate, legally compliant payroll processing	Payroll	**M**		

Ref	Requirement	Category	M/D*	Vendor Response	Vendor Comment
PAY-03	Multi-currency payroll with automated exchange-rate management	Payroll	**M**		
PAY-04	Automated statutory deduction calculations (income tax, social contributions) per country	Payroll	**M**		
PAY-05	Compliance with employer- and employee-related tax obligations	Payroll	**M**		
PAY-06	USAID / US Government labor cost allocation and grant coding	Payroll	**M**		
PAY-07	API/ MCP NetSuite integration for journal entries and financial reporting	Payroll	**M**		
PAY-08	Retroactive pay calculation and correction processing	Payroll	**M**		
PAY-09	Digital payslip delivery with employee self-service access	Payroll	**M**		
PAY-10	Year-end tax document generation by country (W-2 and country equivalents)	Payroll	**M**		
PAY-11	Payroll audit reporting and variance analysis	Payroll	**M**		
PAY-12	Off-cycle and supplemental payroll runs	Payroll	**D**		
PAY-13	Expatriate and cross-border payroll scenarios	Payroll	**M**		
PAY-14	FLSA compliance for US non-exempt employees (overtime calculation)	Payroll	**M**		
PAY-15	Variable payment calendars by location: monthly, semi-monthly, biweekly	Payroll	**D**		
PAY-16	API feeds for retirement, pension, and insurance products	Payroll	**D**		
PAY-17	Pension, healthcare, and other government-required accruals / payments	Payroll	**D**		
PAY-18	HRMS interfaces with other systems (Homere, Solver, ect)	Payroll	**D**		

Ref	Requirement	Category	M/D*	Vendor Response	Vendor Comment
PAY-19	Payroll approval workflow with multi-level approvals and segregation of duties	Payroll	**D**		
PAY-20	Salary advance and loan deduction tracking	Payroll	**D**		
PAY-21	Bank payment / mobile money file generation per country	Payroll	**D**		
PAY-22	Final pay and statutory severance calculations per country law	Payroll	**M**		
PAY-23	Payroll preview, validation, and exception reporting prior to finalization (payroll register report)	Payroll	**M**		
PAY-24	Payroll recalculation capability prior to posting/finalization	Payroll	**D**		
PAY-25	Payroll locking and audit trail for all changes after approval	Payroll	**D**		
PAY-26	Payroll reports & options to create new ad hoc reporting	Payroll	**D**		
PAY-27	Generation of bank payment files compatible with local banking standards (e.g. ACH)	Payroll	**D**		
PAY-28	Split-pay functionality (multiple bank accounts and percentage/fixed allocations)	Payroll	**D**		
PAY-29	Payment status tracking and reconciliation	Payroll	**D**		
PAY-30	Bank account prenotification	Payroll	**D**		
PAY-31	Payslip and form access for terminated staff	Payroll	**D**		
Time & Labor					
TL-01	Electronic time entry via web and mobile	Time & Labor	**M**		
TL-02	Manager approval workflows for time submissions	Time & Labor	**M**		
TL-03	Leave management: annual, sick, parental, and country-specific leave types (all covered countries)	Time & Labor	**M**		

Ref	Requirement	Category	M/D*	Vendor Response	Vendor Comment
TL-04	Leave accrual, carryover, and payout calculations per country policy	Time & Labor	**M**		
TL-05	Integration with payroll for automatic leave deductions and overtime pay	Time & Labor	**M**		
TL-06	Time tracking by employee, grant, and project for BOTH hourly and salaried/exempt staff (donor labor reporting)	Time & Labor	**M**		
TL-07	Legally compliant time tracking per each country's labor law, incl. standard hours worked	Time & Labor	**M**		
TL-08	Integration to NetSuite and potential grants-management systems	Time & Labor	**D**		
TL-09	Configurable work schedules and shift patterns by country	Time & Labor	**D**		
TL-10	FLSA overtime tracking and threshold alerts for US non-exempt employees	Time & Labor	**M**		
TL-11	After-the-fact timesheet certification with e-signature	Time & Labor	**D**		
TL-12	Automated reminders and escalation for late/missing timesheets	Time & Labor	**M**		
TL-13	A leave projector feature, to see what your leave balance will be at a future date	Time & Labor	**D**		
Benefits					
BEN-01	Benefits plan configuration and management by country by contract type	Benefits	**M**		
BEN-02	Open enrollment with configurable windows, employee self-service elections, and decision-support tools	Benefits	**M**		
BEN-03	Life-events processing (marriage, birth, divorce, etc by country) auto-opening related benefit changes	Benefits	**M**		

Ref	Requirement	Category	M/D*	Vendor Response	Vendor Comment
BEN-04	Retirement Administration	Benefits	**D**		
BEN-05	Auto-generate benefit confirmation statements and track dependent eligibility	Benefits	**D**		
BEN-06	Integration with third-party benefits carriers/administrators, incl. local carriers globally	Benefits	**M**		
BEN-07	API feeds for workers' comp, life insurance, global EAP, 401(k)/retirement	Benefits	**D**		
BEN-08	Vacation, severance, and social-benefit liability accruals	Benefits	**D**		
BEN-09	Reporting for social benefits, 13th/14th-month pay, and pension	Benefits	**M**		
BEN-10	ACA compliance reporting for US-based employees	Benefits	**M**		
BEN-11	Benefits cost tracking and employer-contribution reporting	Benefits	**D**		
BEN-12	COBRA administration for US staff	Benefits	**D**		
BEN-13	parental leave trackings, requests, etc by country	Benefits	**D**		
BEN-14	FMLA leave tracking and policy enforcement	Benefits	**D**		
Performance					
PM-01	Configurable review cycles (annual, semi-annual, probationary)	Performance	**M**		
PM-02	Customizable workflows	Performance	**D**		
PM-03	Customizable surveys/reviews: self-evaluation, manager, peer feedback, 360, career development plan	Performance	**M**		
PM-04	Goal setting and cascading objectives from organizational to individual level, with status updates	Performance	**M**		
PM-05	Continuous feedback and check-in functionality	Performance	**D**		

Ref	Requirement	Category	M/D*	Vendor Response	Vendor Comment
PM-06	Performance rating calibration tools for managers and P&C	Performance	**M**		
PM-07	Individual development plan (IDP) tracking; link goals to development plans and LMS	Performance	**M**		
PM-08	Performance improvement plan management	Performance	**M**		
PM-09	Maintain historical performance data and link outcomes to compensation and promotion decisions	Performance	**M**		
PM-10	Automated tracking/notifications when goal-setting, updates, and evaluations are due (until completed)	Performance	**M**		
Succession Planning					
SUC-01	Critical-role identification and talent-pool tracking	Succession Planning	**D**		
SUC-02	Readiness ratings incl. risk-of-loss and bench-strength dashboard	Succession Planning	**D**		
SUC-03	Succession mapping with scenario modeling	Succession Planning	**D**		
SUC-04	Integration with performance and learning history for staff-development tracking	Succession Planning	**D**		
Compensation					
COMP-01	Salary grade structures and pay-band configuration; assign roles to salary grades	Compensation	**M**		
COMP-02	Compensation planning, modeling, and merit-increase cycles with approval workflows	Compensation	**M**		
COMP-03	Bonus and incentive plan administration (flat and tiered/graduated)	Compensation	**M**		
COMP-04	Current and past compensation held in local currency and if possible aligned to USD for comparing	Compensation	**M**		

Ref	Requirement	Category	M/D*	Vendor Response	Vendor Comment
COMP-05	Multi-currency compensation planning across the global workforce	Compensation	**M**		
COMP-06	Compensation tracking for the role/position AND the incumbent in the role	Compensation	**M**		
COMP-07	Salary Adjustment Form / Letter generation	Compensation	**M**		
COMP-08	Supervisor budget management using FULL cost of employee (not just % salary increase)	Compensation	**D**		
COMP-09	Compensation equity analysis and reporting	Compensation	**M**		
COMP-10	Open compensation cycles/modules giving managers an active role in comp analysis	Compensation	**D**		
COMP-11	Market benchmarking data integration (e.g. Mercer, Korn Ferry, Birches Group)	Compensation	**D**		
COMP-12	Total rewards statement generation for employees	Compensation	**M**		
COMP-13	Allowance administration configurable by country (housing, transport, hardship, danger pay)	Compensation	**D**		
Learning & Development					
LMS-01	Organize, manage, and search synchronous and asynchronous courses	Learning & Development	**D**		
LMS-02	Schedule and communicate a calendar of live trainings; staff register / withdraw / waitlist	Learning & Development	**D**		
LMS-03	Assign required trainings; self-enrollment and manager-assigned; track completion	Learning & Development	**M**		
LMS-04	Upload/organize/deliver materials: documents, videos, quizzes, assessments, SCORM-compliant modules	Learning & Development	**M**		
LMS-05	Assessment variety: quizzes, tests, assignments, surveys	Learning & Development	**M**		

Ref	Requirement	Category	M/D*	Vendor Response	Vendor Comment
LMS-06	Role-based access: instructor, supervisor, learner, administrator with permission levels	Learning & Development	**M**		
LMS-07	Track completions, certifications, scores, and training hours by different criteria	Learning & Development	**M**		
LMS-08	Customizable automated reminders for required and elective/overdue training, incl. escalation to supervisor after a late period	Learning & Development	**M**		
LMS-09	Track professional-development budget, including by employee	Learning & Development	**D**		
LMS-10	Users upload/track external certifications, achievements (e.g. graduate degrees), and learning requests	Learning & Development	**D**		
LMS-11	Create and issue completion certificates in various languages	Learning & Development	**D**		
LMS-12	Mobile learning (responsive/app) with offline course completion (marked once reconnected)	Learning & Development	**D**		
LMS-13	Gather learner feedback via surveys / feedback forms	Learning & Development	**D**		
LMS-14	Track learner progress against learning objectives/competencies (linked to Performance module)	Learning & Development	**D**		
LMS-15	Instructor-to-learner feedback functionality	Learning & Development	**D**		
LMS-16	Analytics/reporting on performance, engagement, completion rates, and skill gaps	Learning & Development	**M**		
LMS-17	Policy Hub where employees can view company policies	Learning & Development	**M**		
LMS-18	Social/ Collaborative learning (discussion boards/communities)	Learning & Development	**D**		

Ref	Requirement	Category	M/D*	Vendor Response	Vendor Comment
Analytics & Reporting					
ANA-01	Configurable, dynamic dashboards with real-time workforce metrics	Analytics & Reporting	**M**		
ANA-02	Standard HR report library: headcount, turnover, time-to-hire, compensation	Analytics & Reporting	**M**		
ANA-03	Tracker for final settlement history	Analytics & Reporting	**D**		
ANA-04	Ad hoc report builder with export to Excel and PDF	Analytics & Reporting	**M**		
ANA-05	Grant labor allocation and cost reporting by donor and project code	Analytics & Reporting	**M**		
ANA-06	Single source of record and data integrity for ease of analysis across modules	Analytics & Reporting	**M**		
ANA-07	Self Service Audit and compliance reporting across all modules where all data can be queried	Analytics & Reporting	**M**		
ANA-08	Workforce planning and headcount forecasting tools	Analytics & Reporting	**D**		
ANA-09	People analytics module or integration with BI tools (e.g. Power BI)	Analytics & Reporting	**D**		
ANA-10	Scheduled report distribution to stakeholders	Analytics & Reporting	**M**		
ANA-11	Country-level data security so country HR leads see only their own staff	Analytics & Reporting	**M**		
Compliance					
CMP-01	Generate EEO-1 and VETS-4212 reports with demographic data fields	Compliance	**D**		
CMP-02	Track/report ACA eligibility and generate IRS 1094/1095 forms	Compliance	**M**		
CMP-03	Document retention & destruction policies per region (e.g. 7 yrs payroll, 2 yrs resumes)	Compliance	**M**		

Ref	Requirement	Category	M/D*	Vendor Response	Vendor Comment
CMP-04	Support FMLA, ADA, and local equivalents with leave-balance tracking and policy enforcement	Compliance	**D**		
CMP-05	Global and local labor compliance with multi-lingual documentation	Compliance	**D**		
CMP-06	GDPR: consent tracking, data-subject rights, and data anonymization	Compliance	**M**		
CMP-07	In-country statutory compliance updates included in subscription (no additional charge)	Compliance	**M**		
CMP-08	Country-specific payroll tax tables updated each fiscal year	Compliance	**M**		
CMP-09	Complete audit logs of all transactions (timestamps, users, changes)	Compliance	**M**		
CMP-10	HIPAA (or equivalent) for US employee health and benefits data	Compliance	**M**		
Implementation & Support					
IMP-01	Comprehensive needs analysis to tailor the HRMS to organizational requirements	Implementation & Support	**M**		
IMP-02	Detailed implementation plan: timelines, milestones, resource allocation	Implementation & Support	**M**		
IMP-03	Configure to existing HR processes OR recommend improved in-system workflows	Implementation & Support	**M**		
IMP-04	Secure migration of historical HR data from the current system	Implementation & Support	**M**		
IMP-05	Data validation and cleansing for accuracy and consistency	Implementation & Support	**M**		
IMP-06	Support for quarter- and year-end processing per each location's tax year	Implementation & Support	**M**		
IMP-07	Direct administrative channel to the provider for issue support	Implementation & Support	**M**		

Ref	Requirement	Category	M/D*	Vendor Response	Vendor Comment
IMP-08	Sandbox environment for testing configuration and integrations	Implementation & Support	**M**		
Integrations					
INT-01	NetSuite General Ledger integration to automate journal entries and eliminate manual processes	Integrations	**M**		
INT-02	Budget monitoring and reporting on compensation costs and changes	Integrations	**D**		
INT-03	Microsoft Active Directory integration (LDAP, SAML, SSO)	Integrations	**M**		
INT-04	Bi-directional integration with third-party vendors (benefits, 401(k), EAP, insurance, retirement)	Integrations	**D**		
INT-05	RESTful API (or equivalent) for integration with NetSuite and third-party systems	Integrations	**M**		
INT-06	Support for webhooks, file-based imports, and SFTP for secure transfers	Integrations	**M**		
INT-07	Developer tools: custom API credentials and documentation	Integrations	**M**		
INT-08	Potential integration with grants-management systems	Integrations	**D**		
INT-09	Solver integration or export for budgeting and workforce cost planning	Integrations	**D**		
INT-10	Microsoft 365 / Outlook calendar integration (interview scheduling, leave calendars)	Integrations	**D**		
INT-11	E-signature integration (DocuSign/Adobe Sign) for contracts and letters	Integrations	**M**		
Technical Architecture					
TECH-01	Cloud-native SaaS deployment (multi-tenant or dedicated instance)	Technical Architecture	**M**		

Ref	Requirement	Category	M/D*	Vendor Response	Vendor Comment
TECH-02	Browser-based access; no client-side software installation required	Technical Architecture	**M**		
TECH-03	Native mobile app (iOS and Android) for employee/manager self-service, with push notifications and biometric login	Technical Architecture	**M**		
TECH-04	Minimum 99.9% uptime SLA with regional failover and documented disaster recovery	Technical Architecture	**M**		
TECH-05	24/7 availability with minimal outages; universal access for 100% of employees across all covered countries	Technical Architecture	**M**		
TECH-06	Multi-region data hosting to support data-residency requirements	Technical Architecture	**M**		
TECH-07	Automated software updates with advance change notification to clients	Technical Architecture	**M**		
TECH-08	Dynamic configuration of approval workflows, form templates, and conditional logic (no custom development)	Technical Architecture	**M**		
TECH-09	Track configuration/customization changes with rollback and preview capability	Technical Architecture	**M**		
TECH-10	Full data export in standard formats at contract end	Technical Architecture	**M**		
Security & Privacy					
SEC-01	ISO 27001 certification (or equivalent) with current documentation	Security & Privacy	**M**		
SEC-02	SOC 2 Type II compliance with annual audit reports available to clients	Security & Privacy	**M**		
SEC-03	Data encryption at rest (AES-256+) and in transit (TLS 1.2+)	Security & Privacy	**M**		
SEC-04	Role-based access controls (RBAC) with granular permissions by data sensitivity	Security & Privacy	**M**		

Ref	Requirement	Category	M/D*	Vendor Response	Vendor Comment
SEC-05	Single Sign-On via SAML 2.0 or OAuth 2.0	Security & Privacy	**M**		
SEC-06	Multi-factor authentication (MFA) support	Security & Privacy	**M**		
SEC-07	Data-residency controls: specify geographic storage location by country	Security & Privacy	**M**		
SEC-08	Audit log of all system access and data changes, retained minimum 7 years	Security & Privacy	**M**		
SEC-09	Data-breach notification procedures with SLA within 72 hours of confirmed breach	Security & Privacy	**M**		
SEC-10	Annual penetration testing with results available to clients on request	Security & Privacy	**D**		
Global & Localization					
GLOB-01	UI available in English and French at minimum; multi-lingual documentation	Global & Localization	**M**		
GLOB-02	Support for local character sets and date/number formats by country	Global & Localization	**M**		
GLOB-03	Coverage across all 19 operating countries + US, with capacity for future expansion	Global & Localization	**M**		
GLOB-04	Multi-timezone support across all transactions and timestamps	Global & Localization	**M**		
GLOB-05	Configurable public-holiday calendars by country	Global & Localization	**M**		
Scalability & Performance					
PERF-01	Page load times not exceeding 3 seconds on standard broadband	Scalability & Performance	**M**		
PERF-02	Concurrent-user performance benchmarks available for client review	Scalability & Performance	**M**		
PERF-03	Scalable to 2,000+ employees without pricing penalty beyond the PEPM rate	Scalability & Performance	**D**		

Ref	Requirement	Category	M/D*	Vendor Response	Vendor Comment
PERF-04	Offline / low-bandwidth mode for mobile access in low-connectivity regions	Scalability & Performance	**D**		