



## NATIONAL MEDICAL FELLOWSHIPS

### Request for Proposal: NetSuite Migration and Implementation

National Medical Fellowships, Inc. (the Organization; NMF) is a 501(c)3 organization that advances health equity—where everyone has a fair and just opportunity to achieve their highest level of health regardless of race, ethnicity, disability, sexual orientation, gender identity socioeconomic status or geography.

The Organization provides scholarships, service-learning programs, mentorship opportunities, and clinical research leadership training for chronically marginalized students of medicine and related health professions. The Organization is the only national organization solely dedicated to providing scholarships and support to medical and health professions students across demographic groups chronically excluded from the practice of health care. Those groups include African Americans, Hawaiian and Alaskan Natives, Hispanics/Latinos, Native Americans, Pacific Islanders, Vietnamese, Cambodians, and students with DACA status.

The Organization is supported by a national network of alumni who have serviced tens of millions of patients annually over more than 75 years. As the Organization successfully fulfills its mission, the health disparities that disproportionately impact communities of color will decrease, leading to a future in which Black and brown people no longer die from preventable causes and everyone has access to the high-quality, culturally competent care that they deserve.

NMF acquired the license for NetSuite Suite Success Social Impact Starter Cloud Service on January 2023 to enhance accounting functions and the communication of financial information to the different heads of department and project managers and during the course of six months, NMF worked hand in hand with Oracle to complete the activation service – Suite Success Social Impact Starter. However, the migration services provided by Oracle fell short of NMF’s expectations as the crucial features included in the cloud service were not addressed. NMF is seeking a consultant with experience in the activation or migration phase to assist the VP of Finance and Operations in culminating the activation and setup phase. The main tasks the consultant is expected to complete during this engagement are:

1. Create and define approval authorities for:
  - a. Procurements and contracts
  - b. Purchasing and accounts payable

- c. Invoicing and accounts receivable
  - d. Accounts reconciliation and financial reporting
2. Activate the Advanced Electronic Bank Payments feature and establish interfaces with the NMF's bank and investments accounts financial institutions.
3. Assist management to define key business metrics and design and activate the real-time dashboards for each of the five NMF departments.
4. Create standard non-profit financial reports and other custom reports defined by management including but not limited to cash forecast, contract status and budget planning.
5. Provide onboarding and integration training to the accounting team and project managers on the cloud service's best practices.

Although ambitious, NMF seeks to begin implementation in November 2023 with adherence to a statement of work and schedule. This statement of work will be finalized and shared after reviewing RFPs during the consultant interview and selection process.

### **Statement of Work**

The Consultant is the point person for implementing and optimizing NetSuite software (for all components that are covered in the NetSuite agreement) for NMF. The Consultant will provide support for the best use and integration of NetSuite to meet the varied operational needs of NMF.

- Gain an understanding of NMF as an organization and as it relates to the NetSuite implementation.
- Identify, evaluate, and understand NMF's requirements to guide the NetSuite set-up, configuration, and customization.
- Ensure completion of tasks and components including but not limited to functional specifications, design specifications, configurations, quality assurance, user acceptance testing, implementations, and project reviews.
- Work with the implementation team to design and integrate NetSuite into NMF's infrastructure.
- Develop informational reports, templates, dashboards, process mapping, process workflow, budgets, and financial statements.
- Reviewing the setup and testing of the Professional Services described as part of User Acceptance Testing as defined by the agreement between NetSuite and NMF.
- Be responsible for exporting and manipulating data from the NetSuite instance to comply with localized taxation and reporting requirements.

### Data Migration Obligations:

- Assist management to identify the appropriate import templates to be used in any migration process.
- Assist management in populating the import templates in the most efficient manner.

#### User Acceptance Testing (UAT) Obligations:

- Validate and, if necessary, modify UAT template test scenarios for all modules and all data sets.
- Define additional UAT scenarios as needed.
- Be responsible for and complete UAT in line with testing scenarios.
- Be responsible for removing all UAT data prior to go-live.
- Perform cutover tasks assigned to NMF as identified in the cutover checklist.

#### Enablement Obligations:

- The consultant is required to assist with the configuration of NetSuite with third party software used by NMF. This includes but is not limited to bill.com and Raiser's Edge.
- The consultant will be required to assist the NMF employees with learning the system and the modules.
- The consultant is required to put together a user manual for NMF end users.

Consultants to be considered in this procurement must demonstrate the ability to comply with each of the following requirements:

- The consultant is required to have a current NetSuite certification or relevant experience and is required to provide that to NMF along with a formal bid.
- The consultant should provide at least 2 references for similar work.
- The consultant is required to be a legal entity to provide services in the United States of America and be able to provide all legal documentation upon request.
- The consultant is required to hold their own insurance policies including but not limited to workmen compensation and business liability.
- The consultant is required to comply with all federal, state and local laws.
- The consultant is required to be available between the hours of 9:00 am – 5:30 pm Eastern Standard Time.

#### How to Apply:

- Proposals are due by October 15, 2023, at 5:00 pm EDT to [operations@nmfonline.org](mailto:operations@nmfonline.org). Please note "NetSuite RFP Response" in the email subject line.
- Interviews will be conducted from October 23, 2023 through October 27, 2023.
- NMF will notify the selected consultant by October 31, 2023.
- Proposals should include supporting documents such as resumes/C.V.s, and itemized budget.
- Proposal narrative should address each of the obligations sections above and relate proposer's experience with each and how that experience applies to the NMF project.
- Proposal narrative should also include at least 2 references for similar work.
- Please include a budget in the proposal. All budget proposals may be subject to negotiation.
- For questions, please email [operations@nmfonline.org](mailto:operations@nmfonline.org).