



Request for Quotation (RfQ)

Project name:	WRAP Americas – outsourced HR & Finance provision		
Project code:	CFO022-013		
Date:	4 November 2024		
WRAP contact:	Allison Raygor		
Email:	Allison.raygor@wrap.ngo	Telephone:	+44 1295 584096

You are invited to submit a proposal for the following work that WRAP AMERICAS wishes to commission, the scope and parameters of which are described in [Section A](#) below. If you would like to submit a proposal for WRAP AMERICAS's consideration, please do this by completing Section B of this form. If you wish to submit any questions relating to this tender, please do so by contacting Allison Raygor at Allison.raygor@wrap.ngo before the deadline stated below. **Proposals will be assessed at WRAP AMERICAS' sole discretion balanced between cost and quality.**

SECTION A – Brief of required work

Background and the objective for this work:

WRAP is a global environmental action NGO, and our core purpose is to help tackle climate change. We want to protect our planet by transforming our product and food systems to create circular living. We don't believe that our natural resources should be wasted, everything we use should be re-used and recycled.

We want to power circular living in every boardroom and every home, and you can help us achieve this.

In April 2023 we entered into a fiscal sponsorship arrangement with the National Environmental Education Foundation (NEEF) whilst we mobilized WRAP Americas. We incorporated WRAP Americas Inc in Delaware in August 2023 and received our 501c3 determination in May 2024. WRAP Americas is a part of the WRAP group of entities, led by a global Board and a UK-registered charity.

We are looking for an expert provider of outsourced HR and/or Finance services to support us in the next stage of our growth and as we look to operate independently in the coming months. The Americas team currently comprises 6 employees, based primarily on the East Coast.

Specific requirements for this work:

We are looking for provider(s) experienced with working with non-profits, ideally at early stages of their growth journey. We are looking to procure two distinct sets of services and will consider providers who can deliver either or both lots as described below. Please know that the provider can bid for one or both sets of the following services:

HR services

- Bi-weekly / monthly payroll
- All required employment tax matters
- Employee onboarding and offers of employment
- Employee handbook / HR policies and processes support / templates
- Labor Law advice
- 401k and other employee benefits management
- Market benchmarking and advice for employee benefits
- HR advisory / salary benchmarking
- Training – including federal/state specific requirements
- HR analytics

Finance services

- Accounting, including monthly reporting to WRAP in the UK (likely using the Xero accounting platform)
- Managing vendor payments – including onboarding, loading payments onto the online banking platform etc
- Year-end accounting and supporting with audit requirements
- Funder/donor audits as relevant, as well as other external audits as needed
- Tax filing including 990s, 1099s, W-2s etc
- Other USA statutory reporting – including providing advice, preparing and submitting returns as necessary

We are looking for providers who can flex their level of support as we evolve and strive for growth.

Sensitivities, risks or challenges to be aware of:

- Unknown unknowns of operating in the US – we will be looking to the service provider to relay in-depth knowledge and experience of operating in the US and guidance on best addressing barriers as they arise.
- WRAP's team are based across the US and the UK, so we will all need to be aware of time differences etc.

Key dates for work:

- Contracts signed between WRAP Americas and vendor(s) - end of January 2025
- Dual-running/transition period between current arrangements and new provider(s) - February & March 2025
- Transition to WRAP Americas enabled by new suppliers (e.g. employees move over etc.) - 1 April 2025

Assessment criteria

Bids will be assessed against the following criteria:

- Experience in providing similar services – 20%
- Approach to delivering the services effectively and efficiently – 50%
- Price – 30%

Bidders are asked to produce indicative pricing based on the scenario below and to clearly indicate if they are bidding to provide HR only, Finance only, or both sets of services.

Scenario:

- For the purpose of this costing scenario, assume an initial 1-year period of services being provided
- 8 employees with bi-weekly / monthly payroll and resident across a number of US states
- Provision of templates / advice to produce a compliant employee handbook / set of HR policies
- Support with establishing employee benefits including health insurance
- Support with selecting and onboarding a 401k provider
- Salary benchmarking data for 5 roles
- Vetting and Setting up 5 new suppliers
- Managing 20 supplier payments per month
- Accounting using the Xero platform (or similar)
- Preparing for filing all mandatory tax and other returns

In the response, please be sure to

- Describe your organization - you may wish to highlight relevant services you provide and outline how you are differentiated from other organizations.
- Demonstrate your relevant experience and expertise, supported by examples of previous similar work you have undertaken, including:
 - Your experience of providing HR and/or Finance back-office services to organizations similar to WRAP.
 - Your experience of developing and delivering HR and/or Finance services in the US.
 - Your understanding of the HR and/or Finance sector(s) in the US.
- Where you cite examples, include how you would translate your experience of these to our project.
- Clarify if you are to support SSO OAuth2 standards to allow for single sign on, Integration with Microsoft Azure AD for permissions and access management. This is desirable but not a requirement

If bidding for one set of services (HR or Finance), the written proposal should be limited to no more than ten 8.5" x 11" pages at minimum 10pt font (excl. cover page, index, executive summary and appendices).

If bidding for both sets of services (HR and Finance), the written proposal should be limited to no more than fifteen 8.5" x 11" pages at minimum 10pt font (excl. cover page, index, executive summary and appendices).

You should keep your responses focused on the requirements and specific objectives, and we recommend you also consider the assessment criteria. The assessment panel will not assess beyond the stated maximum number of pages, so if your submission exceeds that number, this may result in your bid being deemed non-compliant. Do not provide information by linking to websites or external sources as the assessors will not refer to these.

Bidders are also asked to provide hourly/daily rates at which further services will be provided, as well as to indicate any discounts being offered (e.g. if bidding for both sets of services)

Following the first stage we will shortlist a small number of bidders and request a presentation and Q&A with each shortlisted bidder, conducted on December 11, 2024. The presentation will be conducted online via Microsoft Teams and last 60 minutes: 30 minutes presentation followed by up to 30 minutes Q&A from the assessment panel.

Response timings and requirements:

All correspondence in relation to this opportunity should be addressed to Allison Raygor. A list of responses to any questions received from prospective providers will be published on the WRAP website prior to the deadline for receipt of quotes, as shown below.

Deadline for receipt of questions relating to request:	13:30 GMT on 22 November
Deadline for receipt of quote:	23:45 GMT on 3 December
Notification of WRAP AMERICAS' decision:	17 December *
Commencement of work:	February 1, 2025*
Completion date:	March 31, 2026*

Terms and conditions

- WRAP AMERICAS is unable to accept any proposals/quotations submitted after the deadline stated.
- Proposals/quotations must be valid for a minimum of 45 days.
- Information in this document is offered in good faith for the guidance of interested parties but no warranty or representation is given as to the accuracy or completeness of any of it. WRAP AMERICAS and its advisors shall not be liable for any error, misstatement or omission. No aspect of this procedure shall constitute a contract or part of a contract. Bidders participate in this process on the strict understanding that the procedure may be altered or that WRAP AMERICAS may not proceed for any reason.
- WRAP AMERICAS reserves the right not to follow up this RfQ in any way and not to enter in to any contractual arrangement with any bidder. WRAP does not bind itself to enter into negotiations, or proceed with or accept any proposal/quotation submitted. Any decision to submit a proposal/quotation is at the sole discretion of bidder and WRAP AMERICAS excludes all liability in respect of any costs incurred in preparing a proposal/quote.
- Suppliers must comply with WRAP Safeguarding Policy (<https://wrap.org.uk/safeguarding-policy>) and will ensure that these standards are monitored throughout the delivery of work. All sub-contractors involved in the project will also be committed to compliance with WRAP Safeguarding Policy.
- Invoices shall be submitted to WRAP AMERICAS only on satisfactory completion of the work. Payment will normally be made only where/when deliverables have been received.
- If you have any question relating to this RfQ or the terms, please contact Allison Raygor at Allison.Raygor@wrap.ngo.

Pricing

Bidders are required to supply the following:

- Total price of all elements of the work, inclusive of sales tax.
- A costed breakdown of the price (inclusive of sales tax), which should set out the separate elements of the work.
- Expenses (if applicable), showing each type of expense expected, and provided separately to the Total Price.

IMPORTANT

- This document will be used to review and agree the detail of a proposal for the supply of goods or services which shall be subject to approval by WRAP AMERICAS.
- This RfQ is issued in strict confidence and its contents should not be disclosed to third parties. All submissions will be treated on a confidential basis by WRAP AMERICAS.

SECTION B – Proposal/Quotation (to be completed by bidder)

Company name:	Name		
Main contact for this quotation:	Name		
Email:	Insert email address	Phone:	
Who will manage the work:	Name		
Email:	Insert email address	Phone:	

1. Explain your experience in providing similar services (20%):

Enter your response here

2. Describe your approach to delivering the services effectively and efficiently (50%):

Enter your response here

3. Detail your quotation (inclusive of sales tax) (30%):

Enter the following:

- Total price of all elements of the work (inclusive of sales tax).
- A costed breakdown of the price, which should set out the separate elements of the work (inclusive of sales tax).
- Expenses (if applicable), showing each type of expense expected, and provided separately to the Total Price.