

## **Request for Proposals**

**Title: CI GEF/GCF Project and Portfolio Management System**

**RFP No: CI-GEF-CI-GCF-FY22-001**

**Date of Issuance:** October 1, 2021

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### **1. Background**

Conservation International (CI) serves as an Accredited Entity for the Green Climate Fund (GCF) and a Project Agency for the Global Environment Facility (GEF). In this capacity, CI is responsible for designing large scale projects that benefit the environment, via the CI-GEF/GCF Agencies. The CI-GEF/GCF Agencies bridge the gap between the project executing entity and the GEF/GCF Secretariats.

The CI-GEF/GCF Agencies work with executing entities to develop projects based on the GEF/GCF program guidelines and standardized processes and present the projects for funding. The CI-GEF/GCF Agencies coordinate revisions and updates to programs based upon the GEF/GCF Secretariat feedback. Once projects are approved, CI-GEF/GCF Agencies issue grants to the executing entities and oversee both the technical project execution as well as financial management. The CI-GEF/GCF agencies are responsible for reporting to the GEF/GCF Secretariat on the individual project progress and contribution to the CI GEF/GCF Agencies impact targets. Additionally, the CI GEF/GCF Agencies are responsible for meeting their own management impact measurements of efficiency and effectiveness.

Currently, the CI-GEF and GCF Agencies oversee 40+ projects totaling \$180+ million with more in development. Conservation International seeks to develop a system to help manage the GCF and GEF projects during all project phases; including 1) pre-concept or concept development, 2) Project Preparation Facility (PPF) or Project Preparation Grant (PPG) active, 3) implementation inclusive of monitoring and evaluation, and 4) close-out. Currently, the CI-GEF and GCF Agencies use a combination of solutions to meet the program and project management needs: Word and Excel templates to manage the reporting as well as Sharepoint as the document repository. Additionally, CI-GEF and GCF Agencies utilize ConservationGrants (Salesforce/foundationConnect) as the CI system of record for managing the review, award, reporting and payments on external grants that are issued under the CI-GEF and GCF Agencies programs.

### **2. Project Overview**

#### **Program and Project Management (PPM) Components & Requirements**

This project envisions the creation of a software platform that will be used by the CI-GEF/GCF Agencies to execute their program and project management activities in a way that improves efficiencies in processing, analysis and oversight. The Program and Project Management (PPM) system will help facilitate the management and relationship between CI-GEF/GCF Agencies and the project executing entities. While the detailed templates and processes differ slightly between the two Agencies, the core system components or requirements listed below are shared between them.

After successful implementation for the CI GEF/GCF Agencies, CI may consider implementation across CI global programs and may issue follow up RFPs for any additional services work required for rolling out the platform to additional programs.

- **Program/ Portfolio Management:** Provide the ability to capture program (CI GEF/GCF Agency) level details for each project, including but not limited to, key internal and external contacts, total budget, key performance indicators and targets, risks, project stages.
- **High-Level Project Management:** Provide the ability to track the key elements of an individual project within the program such as description, category, current phase, internal and external contacts. Ability to provide templates of project artifacts like work plans and required approvals by project and project phase.
- **Work Plan and Deliverable Management:** For each stage of a project, provide the ability to develop a work plan that includes a multi-tiered structure for Components, Outcomes, Deliverables and Activities. Providing reporting capabilities against that work plan. Also provide the ability to track the approvals of all deliverables by project by phase.
- **Results Framework/Logical Framework:** For each project, provide the ability to track the results or logical framework that associates project outcomes and outputs to workplan activities. Additionally, for each project, provide the ability to identify the methods of measurement, baseline values, targets project impacts.
- **Safeguard Analysis and Mitigation:** For each project, provide the ability to capture safeguard analysis and mitigation plans and activities.
- **Risk Management:** Provide the ability to capture risks associated with programs, projects, project phases or individual safeguards as well as activities to manage risks.
- **Monitoring and Evaluation:** For each project and project phase, be able to report against both the workplan activities and the results framework impacts throughout the duration of the project. Additionally, be able to capture and report on evaluation activities and recommendations for the project.
- **Budget and Financial Management:** For each project and phase, provide the ability to capture summary budget information by component, cost category and year. Provide the ability to capture co-financing amounts with type and source.
- **Amendments and Change Requests:** For each project phase, provide the ability to request, review, and approve amendments to the project.
- **Applicant/Grantee Portal:** Provide the ability for executing entities to submit documents and information to the CI-GEF/GCF Agencies through the use of a grantee portal. The goal of the portal is to eliminate the need for sending of files and content through email to the greatest extent possible.
- **Document Management:** Provide the ability to associate files and documents to specific project phase deliverables, such as budgets, Safeguard plans, etc. Provide robust functionality to track submission of documents from applicants/grantees to CI-GEF/GCF

Agencies and provide a smooth mechanism to capture comments and feedback for applicants/grantee. Integration with Sharepoint as the file repository is greatly preferred.

- **Approval Processes:** Provide the ability to track both Agency and Secretariat level approvals for specific funding requests and reports. Provide the ability to capture review comments that are clearly tied to file versions submitted.
- **Reporting and Dashboards:** Provide the ability to create reports and dashboards at the program, project and project phase level to assist with management and oversight of the portfolio.
- **Email or Messaging Functionality:** Provide the ability to track email and chat messages related to individual records within the PPM system.
- **Automatic Reminders and Alert Functionality:** Provide the ability to provide reminder emails to both internal and external users on upcoming deadlines and deliverables.
- **Integration with Conservation Grants:** Provide the ability to associate one or more grants in Conservation Grants to a project or project phase. Additionally, be able to streamline data entry between PPM and CG for common project level information as well as display summary information from Grants within PPM for details like reporting status, payment and expenditure data, and grant periods, etc. Additionally, determine how an executing entity would interact with a single portal.
- **Document Generation and Templates:** Provide the ability to generate standardized documents based upon GEF and GCF templates in Excel/ Word/PDF from the PPM system.
- **Technical Support Plans:** Provide the following items to facilitate technical support: Security Plan, Backup Plan, Ongoing Maintenance Plan and Integration Support.

#### **Scope of Initial Project Implementation**

The scope for the initial configuration and launch of the PPM system under this RFP is detailed in Attachment 2, Scope of work. As the CI-GEF and GCF Agencies have slightly different processes and are differing levels of maturity, the initial scope of the implementation covered by this RFP will include primarily CI-GEF requirements and a select portion of GCF requirements. The columns in the use cases indicate if the use case will apply to GEF Only or both agencies for implementation.

#### **GEF and GCF Regulations and Processes**

The CI-GEF and GCF Agencies must follow standard procedures and templates prescribed by the GEF and GCF Secretariats. We encourage bidders to become familiar with the funding process and artifacts available on the GEF Secretariat and GCF Secretariat websites.

**GEF:** <https://www.thegef.org/documents/templates>

**GCF:** <https://www.greenclimate.fund/projects/process>

**CI-GEF Agency:** <https://www.conservation.org/gef>

**CI-GCF Agency:** <https://www.conservation.org/gcf>

#### **Size of Portfolio**

The expected size of portfolio will increase over time for the GCF. The GEF portfolio is expected to remain consistent. Currently, the portfolio is as follows:

Agency	Current Portfolio #Projects/#Grants by project phase			
	Pre-concept/Concept	PPF/PPG- Active	Implementation/Active	Closed Projects/PPG/PPF
GEF	2	18	21	25
GCF	10	0	2	2

### Number of Users and Roles

We currently expect a total of 25 CI-GEF/GCF Agency users with the following roles:

- Technical Leads
- Grant Manager/Coordinator
- Operations Lead
- Management
- System Administrators

The estimated number applicant/grantee users is 120.

### Language and Currency

The CI-GEF and GCF Program and Project Management (PPM) System will be exclusively developed in English and all currency fields will be denominated in USD.

However, it is preferred that the proposed platform is able to accommodate multiple languages and currencies.

### Integration with ConservationGrants

ConservationGrants is the CI system of record for external grants and therefore is closely connected with the PPM system. As CI-GEF and GCF approve projects through the stages from concept to implementation, grants will be awarded to the executing entity to conduct project activities.

ConservationGrants is built on Salesforce and utilizes standard foundationConnect functionality for the management of grants including: Requests, Grantee Budget Lines and Budget Line Updates, Grantee Reports, Payments and Amendments.

At a minimum, the following data must be retained in ConservationGrants:

- Basic Grant Information, such as Grant Number, Grantee, Project Title, Period of Performance, Amount, etc.
- Financial and Operations award screening and approvals
- Schedule of Required Grantee Reports and Report Status
- Financial Report Expenditures
- Grant Payments
- Grant Amendment Information

Additionally, ConservationGrants is currently integrates with the CI financial system to obtain financial reference information and to process grant payments.

The goals of the integration are to (1) eliminate duplicate data entry and (2) provide visibility between the two systems for related information. CI is open to solution options that meet these goals within our current environment or in a new Salesforce environment. If a new Salesforce environment is recommended, please include details on the Salesforce product recommendation such as Outbound Funds or Grants Management.

#### **Integration with Sharepoint**

Sharepoint is the CI knowledge management system and as such the system should allow for the integration of Sharepoint and Salesforce to allow for all files to be stored inside Sharepoint within a file structure that allows for ease of use/identification as well as appropriate level of security to the files within Sharepoint equal to the access within Salesforce. Once documents are approved, the files should be locked for edit and deletion.

### **3. Scope of Work, Deliverables and Deliverables Schedule**

- Deliverables and Deliverable Schedule - See Terms of Reference as Attachment 2
- Functional and Technical Requirements - See Attachment 3

### **4. Submission Details**

- a. Deadline. Proposals must be received no later than **November 1, 2021, at 11:59PM EDT (UTC-03:59)**. Late submissions will not be accepted. Proposals must be submitted via email to [cigef@conservation.org](mailto:cigef@conservation.org). All proposals are to be submitted following the guidelines listed in this RFP.
- b. Validity of bid. 120 days from the submission deadline
- c. Clarifications. Questions may be submitted to [cigef@conservation.org](mailto:cigef@conservation.org) by the specified date and time in the timeline below. The subject of the email must contain the RFP number and title of the RFP. CI will respond in writing to submitted clarifications by the date specified in the timeline below. Responses to questions that may be of common interest to all bidders will be posted to the CI website and/or communicated via email.
- d. Amendments. If at any time prior to the deadline for submission of proposals, CI may, for any reason, modify the RFP documents by amendment which will be posted to the CI website and/or communicated via email.

### **5. Minimum Requirements**

- a. Technical Requirements – The technical proposal must include confirmation that the proposed solution will meet the following technical requirements:
  - Based on Salesforce platform, either built on native Salesforce functionality or add-on applications or a combination of both
  - Ability to Integrate with ConservationGrants, either in the existing Salesforce organization or a new Salesforce organization that is integrated
  - Ability to integrate with Sharepoint
  - Functions in geographic areas with low connectivity and bandwidth
  - Applications have demonstrated security and service reliability

- Applications offer a customer support portal that includes documentation plus access to user support technicians
- Applications offer periodic enhancements and updates based upon customer requests and Salesforce platform updates
- Solution can be supported by a wide variety of external partners (i.e., knowledge to administer platform is not proprietary to a single partner)

b. Implementation Partner Requirements

- Direct experience deploying PPM solutions at no less than 3 large nonprofit organizations
- Experience implementing solutions on the Salesforce platform
- Experience integrating similar solutions with existing platforms and document management solutions
- Follow an organization standard implementation methodology, preferably based on agile principles
- Experience in ensuring compliance with applicable data privacy and data security requirements
- Project management staff experienced in managing projects of similar size and complexity

**6. Proposal Documents to Include**

- a. Signed cover page on bidder's letterhead with the bidder's contact information
- b. Signed Representation of Transparency, Integrity, Environmental and Social Responsibility **(Attachment 1)**
- c. Completed Vendor Security Management Questionnaire for implementing agencies and all partners **(Attachment 6;** download here: <https://www.conservation.org/rfp-security-survey>)
- d. Technical Proposal
  - i. Attestation of meeting Minimum Requirements Listed in Section 5 above
  - ii. Functional and Technical Requirements – The technical proposal must include clarification about whether the proposed solution can meet CI's requirements, as detailed in Attachment 3 by completing the following columns for each requirement

**Solution Met By:**

- Salesforce Core Functionality
- Salesforce Configuration
- Third Party Application
- Custom Code
- Not met

**Additional Information:**

Please elaborate on how your proposed solution will address (or not address) this use case, if you think additional details are helpful. If a third-party application is required, please indicate the application.

- iii. Implementation Partner Solution Recommendation

- Names of proposed platforms and implementation partner, plus contact information.
  - Diagram of proposed solution platforms if multiple Salesforce environments and applications are recommended to meet requirements and use cases.
  - A Written Information Security Plan (WISP) that is publicly available, for non-Salesforce applications.
  - Confirmation of having an Incident Response Plan (IRP). If not publicly available, please provide the SOC 1 or SOC 2 reports to confirm the existence of an IRP for non-Salesforce applications.
  - Written description of data backup recommendations
  - Description of ongoing maintenance requirements of the proposed solution, including recommended staff hours to support expected user base.
  - Provide the Service Level Agreement and an estimated meantime to recovery for all non-Salesforce applications.
  - Provide information on whether Diversity Equity and Inclusion principles are incorporated into system design.
- iv. Implementation Methodology including
- Description of the high-level methodology and process
  - Roles and responsibilities of implementation partner
  - Roles and responsibilities of CI and estimated level of effort required; and
  - Standard artifacts that are generated as part of your methodology, such as use case templates, UAT test scripts, configuration/technical design documents
  - Standard meeting schedule
  - Estimated timeline for project implementation
  - High level description of data migration strategy and delineation of roles between CI and implementor
  - Description of administrator and end-user training approach
- v. Implementation Partner Experience including
- Corporate Capabilities, Experience, Past Performance, and 3 client references. Please include descriptions of similar projects or assignments and at least three client references.
  - Staffing plan and Personnel Qualifications. Please propose how the project will be staffed. Attach CVs of personnel proposed for the project that demonstrate how the team proposed meets the minimum requirements listed in section 5 (Minimum Requirements).
- e. Financial Proposal. Offerors shall use the cost proposal template (**Attachment 4**) following the instructions and submitted as an Excel file.

**7. Evaluation Criteria** In evaluating proposals, CI will seek the best value for money considering the merits of the technical and costs proposals. Proposals will be evaluated using the following criteria:



**Stage 1: Minimum Requirements**

**A platform and implementation partner who meet the following criteria will be selected as finalists for live demonstrations in November of 2021:**

Platform meets the technical requirements specified in Section 5 of the RFP	Yes / No
Implementation partner meets minimum requirements specified in Section 5 above.	Yes / No
Implementation partner can clearly and confidently present cost and time estimates to set up proposed solution	Yes / No
Implementation partner will sign CI's Mutual Non-Disclosure Agreement for participation in Stage 2 evaluation	Yes / No
Implementation partner will sign CI's standard agreement for provision of services and/or the development of software systems, Global Data Processing and Data Security Addendum	Yes / No

**Stage 2: Live Demonstrations**

The finalists who meet the initial criteria, will conduct live demonstrations, one focused on the technical components and data security, the other focused on how the solution meets the functional requirements. Finalists will be asked to interview with CI for 60 minutes with a focus on system architecture, application, and data security. Additionally, finalists will be invited to an 120 minute system demonstration focused on how the solution meets the functional requirements. Finalists requested to interview will be required to sign a Non-Disclosure Agreement (NDA).

**Stage 3: Full Proposal Scoring**

The award will be made to the offeror whose proposal is determined to be responsive to this solicitation document, meets the minimum requirements stated in this RFP, meets the technical capability requirements, and is determined to represent the most advantageous to CI. Scoring will be based on the following criteria:

Evaluation Criteria	Percentage
Technical Platform <ul style="list-style-type: none"> <li>• Meets or exceeds technical requirements outlined above, including application and data security and privacy requirements</li> <li>• Meets use cases</li> <li>• Ongoing maintenance needs to ensure compliance with Salesforce updates are reasonable</li> <li>• Quality of end-user experience</li> <li>• Integrates with ConservationGrants and Sharepoint</li> <li>• Customer support portal that includes documentation</li> <li>• Strong references asserting above findings</li> </ul>	40



<ul style="list-style-type: none"> <li>• Clear and reasonable contract lengths</li> </ul>	
<b>Implementation partner</b> <ul style="list-style-type: none"> <li>• Possesses experienced staff and resources to successfully develop solution</li> <li>• Proven strategic and technical expertise</li> <li>• Understanding of current industry best practices and applicable privacy / data security requirements</li> <li>• Compatible project management methodology</li> <li>• Proven track record building solutions for large, international nonprofits</li> <li>• Strong references verifying above qualities</li> </ul>	25
<b>Pricing</b> <ul style="list-style-type: none"> <li>• Initial software fees are reasonable</li> <li>• Annual licensing fees are reasonable</li> <li>• Implementation fees are reasonable</li> <li>• Ongoing maintenance costs are reasonable</li> <li>• 5-year total cost of ownership</li> </ul>	25
<b>CI Resource Needs</b> <ul style="list-style-type: none"> <li>• CI staff time and expertise to implement the system is reasonable</li> <li>• CI staff time and expertise to maintain the system is reasonable</li> </ul>	10

## 8. Proposal Timeline

RFP Issued	1 October 2021
Clarifications submitted to CI	8 October 2021
Clarifications provided to known bidders	15 October 2021
Complete proposals due to CI	1 November 2021
Demonstrations	15 November – 10 December 2021
Final selection	17 December 2021
Contract Finalized	17 January 2022
Work Begins	1 February 2022

- 9. Resulting Award** CI anticipates entering into an agreement with the selected bidder by **January 17, 2022**. The successful bidder will have to agree to enter into contractual terms based on CI's standard agreement templates for provision of services and/or the development of software systems and CI's template global data processing and security addendum, the terms of which are non-negotiable.

This RFP does not obligate CI to execute a contract, nor does it commit CI to pay any costs incurred in the preparation or submission of the proposals. Furthermore, CI reserves the right to reject any and all offers, if such action is considered to be in the best interest of CI. CI will, in its

sole discretion, select the winning proposal and is not obligated to share individual evaluation results.

**10. Confidentiality** All proprietary information provided by the bidder shall be treated as confidential and will not be shared with potential or actual applicants during the solicitation process. This includes but is not limited to price quotations, cost proposals and technical proposals. CI may, but is not obliged to, post procurement awards on its public website after the solicitation process has concluded, and the contract has been awarded. CI's evaluation results are confidential and applicant scoring will not be shared among bidders.

**11. Code of Ethics** All Offerors are expected to exercise the highest standards of conduct in preparing, submitting and if selected, eventually carrying out the specified work in accordance with CI's Code of Ethics and the Green Climate Fund's [Policy on Prohibited Practices](#). Conservation International's reputation derives from our commitment to our values: Integrity, Respect, Courage, Optimism, Passion and Teamwork. CI's Code of Ethics (the "Code") provides guidance to CI employees, service providers, experts, interns, and volunteers in living CI's core values, and outlines minimum standards for ethical conduct which all parties must adhere to. Any violation of the Code of Ethics, as well as concerns regarding the integrity of the procurement process and documents should be reported to CI via its Ethics Hotline at [www.ci.ethicspoint.com](http://www.ci.ethicspoint.com).

**12. Attachments:**

Attachment 1: Representation of Transparency, Integrity, Environmental and Social Responsibility

Attachment 2: Terms of Reference

Attachment 3: Functional and Technical Requirements

Attachment 4: Cost Proposal Template

Attachment 5: Global Data Processing and Security Addendum

Attachment 6: Vendor Security Management Questionnaire

Attachment 7: Terms of Service for Development of Software Systems

**Attachment 1: Representation of Transparency, Integrity, Environmental and Social Responsibility**

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All Offerors are expected to exercise the highest standards of conduct in preparing, submitting and if selected, eventually carrying out the specified work in accordance with CI's Code of Ethics. CI's Code of Ethics provides guidance to CI employees, service providers, experts, interns, and volunteers in living CI's core values, and outlines minimum standards for ethical conduct which all parties must adhere to. Any violations of the Code of Ethics should be reported to CI via its Ethics Hotline at [www.ci.ethicspoint.com](http://www.ci.ethicspoint.com).

CI relies on the personal integrity, good judgment and common sense of all third parties acting on behalf, or providing services to the organization, to deal with issues not expressly addressed by the Code or as noted below.

**I. With respect to CI's Code of Ethics, we certify:**

- a. We understand and accept that CI, its contractual partners, grantees and other parties with whom we work are expected to commit to the highest standards of Transparency, Fairness, and Integrity in procurement.

**II. With respect to social and environmental standards, we certify:**

- a. We are committed to high standards of ethics and integrity and compliance with all applicable laws across our operations, including prohibition of actions that facilitate trafficking in persons, child labor, forced labor, sexual abuse, exploitation or harassment. We respect internationally proclaimed human rights and take no action that contributes to the infringement of human rights. We protect those who are most vulnerable to infringements of their rights and the ecosystems that sustain them.
- b. We fully respect and enforce the environmental and social standards recognized by the international community, including the fundamental conventions of International Labour Organization (ILO) and international conventions for the protection of the environment, in line with the laws and regulations applicable to the country where the contract is to be performed.

**III. With respect to our eligibility and professional conduct, we certify:**

- a. We are not and none of our affiliates [members, employees, contractors, subcontractors, and consultants] are in a state of bankruptcy, liquidation, legal settlement, termination of activity, or guilty of grave professional misconduct as determined by a regulatory body responsible for licensing and/or regulating the offeror's business
- b. We have not and will not engage in criminal or fraudulent acts. By a final judgment, we were not convicted in the last five years for offenses such as fraud or corruption, money laundering or professional misconduct.
- c. We are/were not involved in writing or recommending the scope of work for this solicitation document.
- d. We have not engaged in any collusion or price fixing with other offerors.
- e. We have not made promises, offers, or grants, directly or indirectly to any CI employees involved in this procurement, or to any government official in relation to the contract to be

performed, with the intention of unduly influencing a decision or receiving an improper advantage.

- f.** We have taken no action nor will we take any action to limit or restrict access of other companies, organizations or individuals to participate in the competitive bidding process launched by CI.
- g.** We have fulfilled our obligations relating to the payment of social security contributions or taxes in accordance with the legal provisions of the country where the contract is to be performed.
- h.** We have not provided, and will take all reasonable steps to ensure that we do not and will not knowingly provide, material support or resources to any individual or entity that commits, attempts to commit, advocates, facilitates, or participates in terrorist acts, or has committed, attempted to commit, facilitate, or participated in terrorist acts, and we are compliant with all applicable Counter-Terrorist Financing and Anti-Money Laundering laws (including USA Patriot Act and U.S. Executive Order 13224).
- i.** We certify that neither we nor our directors, officers, key employees or beneficial owners are included in any list of financial or economic sanctions, debarment or suspension adopted by the United States, United Nations, the European Union, the World Bank, or General Services Administration's List of Parties Excluded from Federal Procurement or Non-procurement programs in accordance with E.O.s 12549 and 12689, "Debarment and Suspension".

Name: \_\_\_\_\_

Signature: \_\_\_\_\_

Title: \_\_\_\_\_

Date: \_\_\_\_\_

## **Attachment 2: Terms of Reference**

### **Scope of Work**

This RFP will address the CI-GEF and GCF Agencies PPM system as described in the use cases detailed in Attachment #3: Functional and Technical Requirements.

As part of the implementation of the solution, we expect the implementation partner to execute the following activities:

#### **Component #1** – Detailed Requirements Analysis, User Story Development, and Sprint/Release Plans

The vendor will review program collateral and interview key stakeholders to refine system requirements and define process flows. Deliverables of the requirements phase include a detailed system architecture design and implementation user stories, including point estimation.

#### **Component #2** – System Installation, Configuration/Development, Testing and Implementation of User Stories

The vendor will design, develop, test and deliver system components based upon approved use cases using an agile methodology. The vendor will be responsible for unit and QA testing of stories prior to user acceptance testing.

#### **Component #3** - Integration with Microsoft O365 Sharepoint

The vendor will design, develop, test and deliver integration components based upon approved use cases using an agile methodology. The vendor will be responsible for unit and QA testing of stories prior to user acceptance testing.

#### **Component #4** - Integration with ConservationGrants

The vendor will design, develop, test and deliver integration components based upon approved use cases using an agile methodology. The vendor will be responsible for unit and QA testing of stories prior to user acceptance testing.

#### **Component #5** – Data Migration

The vendor will be responsible for identifying a migration plan and provide templates for migration at a minimum. Additionally, it is desired that the vendor also provide initial data mapping, validation and data cleanup support. The vendor should be clear in their response regarding any other services that are included in the quotation to support data migration.

#### **Component #6** – Release Management, Deployment Planning, and Post-Production Support

The vendor will work with CI to determine an appropriate release calendar and process to migrate functionality, including integration, into the production environment. The vendor will be responsible for migrating code from development instances into the full test environment for UAT. The vendor will provide instructions and oversight to CI staff to migrate code into the production environment. The vendor will also support the creation of users and related security profiles, configuration of system settings, etc.

#### **Component #7** – Knowledge Repository, Technical Knowledge Transfer and Training

The vendor will provide in depth knowledge transfer to CI technical and system administrator tasks on system administration and maintenance tasks. In addition, the vendor will provide training to CI GEF/CGF Agencies on system functionality.

**Component #8 – Project Management**

The Implementation Partner will lead the project management of the implementation and will be required to provide the following under this engagement:

- A project manager to oversee the execution of the project
- A project timeline that provides a list of activities, resources requirement, planned start and end dates, critical milestones, and dependencies for each functional area
- A risk management process for identifying risks associated with the project timeline and deliverables
- A collaboration tool and process, including meetings, centralized data repository, process to facilitate the activities required for the project, and an area where bugs can be logged and their resolution tracked.

Note: Conservation International requires an agile project management methodology for System Installation, Configuration/Development, Testing and Implementation of User Stories. As part of the project management deliverables, there will be an agile project management plan that will describe how the project will be managed in terms of identification of sprint length and content, project team roles, and the process for managing stories from backlog through to deployment. The technical proposal should include detail of the vendor’s implementation methodology and project management activities that are a standard part of the engagement.

**Component #9 – Technical Management**

The Implementation Partner will be required to provide the following technical requirements:

- Detailed backup plan
- Detailed security plan
- Detailed transition plan

As part of this engagement, Conservation International will provide access to subject matter experts, system owners, system and content administrators, source system, and any other supporting materials that are required for the activities under this engagement. CI may provide the code repository, if applicable, upon request.

Final delineation of roles and responsibilities will be based upon proposals and will be finalized as part of final contract negotiation.

**Deliverables and Acceptance Criteria**

#	Activity	Due Date	Deliverable	Acceptance Criteria
	Detailed Requirements Gathering	TBD	Stakeholder Meeting Schedule	Schedule accommodates all required stakeholders

			Stakeholder Meetings	Stakeholder Meetings covered all required functional areas and use cases
	Develop Detailed User Stories	TBD	User Stories	User stories are written in a format of "As a <<actor>>, I can <<perform an action>>, so I can <<benefit>>, contain an estimated level of effort, and the priority as indicated by CI. CI staff approve of all acceptance criteria
	Develop Finalized System Architecture	TBD	System Architecture Diagram	System diagram contains reference to all application components and services and indicates the data connections/flows between components
	Determine details of agile development plan	TBD	<p>Sprint Timeline, including number of sprints, high level sprint contents, and velocity</p> <p>Sprint Meeting schedule with participants</p> <p>Story Management process, including bug/treatment</p>	<p>Timeline is comprehensive and adequately reflects CI constraints, current user story estimates, code dependencies, and CI priorities</p> <p>Sprint meeting types are defined by purpose, frequency (days/times), and participants</p> <p>A detailed process of how a story moves from backlog into sprints, the stages of the stories</p>

			Project Management reporting process	<p>within the sprints, and who is responsible for moving a story between the stages. Additionally, the process for handling bugs is defined and agreed to with CI</p> <p>CI agrees to the Project management reporting process including the monitoring estimates versus actual level of effort as well as the budget burndown rate. Escalation process is defined for issues with CI or implementation partner performance.</p>
	Design, Develop and Test User Stories	TBD	Deliverables are listed in each user story	Stories meet acceptance criteria defined in each story.
	Integration with Sharepoint	TBD	<p>Technical Design Spec</p> <p>Code Repository, as required</p> <p>Error handling procedure, as required</p>	<p>Meets technical requirements.</p> <p>Meets all relevant use cases.</p> <p>Meets security requirements</p>
	Integration with ConservationGrants	TBD	<p>Technical Design Spec</p> <p>Code Repository, as required</p> <p>Error handling procedure, as required</p>	<p>Meets technical requirements.</p> <p>Meets all relevant use cases.</p> <p>Meets security requirements</p>



	Data Migration, final deliverables defined during contract stage	TBD	<p>Migration Plan</p> <p>Migration Templates</p> <p>Data Mapping, Analysis and Error Identification</p>	<p>Detailed plan indicates what data is migrated, the source of the data to be migrated, and any data transformation that is required</p> <p>Templates are provided that can be used to import data into PPM system from source system(s)</p> <p>Provides CI GEF/GCF staff with data mapping, analysis of data migration errors and cleanup required</p>
	Release Management and Deployment Planning	TBD	<p>Release Plan</p> <p>Release Content Inventory Documents</p> <p>Cutover Checklist</p>	<p>Release plan includes details of the scope, timing, roles/responsibilities from development environments, to full testing and production</p> <p>For each release, a detailed inventory of functionality being included is prepared and reviewed prior to release.</p> <p>For each release, a detailed cutover checklist is provided with detail of the task, the person responsible, the date/time to be</p>

				completed and any dependencies
	Post-Production Support		<p>Access to partner staff for post-production issues for 2 weeks</p> <p>Bug fixes, enhancements as needed for critical and high priority issues</p>	Partner staff are available on the day of cutover and on an agreed upon schedule to troubleshoot and fix any issues that arise.
	Knowledge Repository	Ongoing	<p>All stories documented in Jira</p> <p>All artifacts on shared drive</p> <p>Code Repository</p>	<p>Jira stories include details on any open questions, decisions that are made, details on configuration, and testing results.</p> <p>All deliverables are stored in a shared repository</p> <p>All technical code is checked into a code repository to which CI has access.</p>
	Knowledge transfer (technical admin)	TBD	<p>Live demonstration with technical admins at CI.</p> <p>Robust written documentation.</p>	Technical administrators at CI understand maintenance procedures.
	Training	TBD	Training Curriculum, Materials, and Training Classes to CI GEF/GCF Agencies	<p>Agencies receive training on PPM system features required to perform their jobs.</p> <p>Training materials provide guidance to Agency and Executing Entity staff on how to execute activities in the PPM System</p>

	Project management	Ongoing	<p>Weekly budget and scope burn down reports submitted.</p> <p>Alerts to stories that exceed original estimates</p> <p>Issues database maintained.</p> <p>Project plan developed and routinely monitored/updated</p> <p>Risk register developed and routinely monitored</p>	<p>Reports received by CI.</p> <p>CI is alerted to stories that exceed the original estimate and also exceed total sprint estimate</p> <p>Issues database approved by CI.</p> <p>Plan approved by CI.</p> <p>Register approved by CI.</p>
	Technical Management	TBD	<p>Detailed backup plan</p> <p>Detailed security plan</p> <p>Detailed transition plan</p>	<p>Plan is approved by CI.</p> <p>Security plan covers both application and user security and approved by CI.</p> <p>Contains a list of ongoing maintenance tasks required of CI and approved by CI</p>

### **Attachment 3: Functional and Technical Requirements**

Refer to attachment 3 for a list of Requirements by Functional area. For each requirement, the attachment provides a system priority level as well as whether the feature is required for initial implementation for the GEF program only or both GEF and GCF. Please indicate in column D “Solution Met By”, if the requirement is met by Salesforce Core Functionality, Salesforce Configuration, Third Party Application, Custom Code or not Met. In column E “Additional Information”, please provide any additional clarification on how your solution meets the requirement, including the name of the third-party application that is used.

Please see link below:

[RFP Requirements Link](#)

### **Attachment 4: Cost Proposal Template**

The cost proposal must be all-inclusive of profit, fees or taxes. Additional costs cannot be included after award, and revisions to proposed costs may not be made after submission unless expressly requested by CI should the offerors proposal be accepted. Nevertheless, for the purpose of the proposal, Offerors must provide a detailed budget showing major expense line items. Offers must show unit prices, quantities, and total price. All items, services, etc. must be clearly labeled and included in the total offered price. All cost information must be expressed in [USD](#).

In addition to service fees by component described in Attachment 2, the Financial Proposal must break out the following fees and costs:

Annual License Cost by Software/App:  
Salesforce License Type: #Users, Cost per user per year  
Other License Fee(s):  
Annual Maintenance Costs:

If selected, Offeror shall use its best efforts to minimize the financing of any taxes on goods and services, or the importation, manufacture, procurement or supply thereof. If Offeror is eligible to apply for refunds on taxes paid, Offeror shall do so. Any tax savings should be reflected in the total cost.

Please see link below:

[RFP Budget Template Link](#)



**Attachment 5: Global Processing and Data Security Addendum**

CI will require the implementation partner(s) and all software vendors to agree to CI's Global Processing and Data Security Addendum.

Please see link below:

[CI's Global Processing and Data Security Addendum Link](#)



**Attachment 6: Vendor Security Management Questionnaire**

CI requires the implementation partner(s) and all software vendors to submit the attached Vendor Security Management Questionnaire along with copies of SOC2 report where applicable.

Please see link below:

[Vendor Security Management Questionnaire Link](#)



**Attachment 7: Terms of Service for Development of Software Systems**

CI will require the implementation partner(s)/software developer to agree to CI's Terms of Service for Development of Software Systems.

Please see link below:

[CI's Terms of Service for Development of Software Systems Link](#)