



Request for Proposals (RfP) IUCN CRM migration

Global Information Systems

Issue Date: 23 May 2018

Closing Date and Time: 11 June 2018 – 13h00 (CEST)

IUCN Contact :

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PART 1 – INSTRUCTIONS TO PROPOSERS AND PROPOSAL CONDITIONS

1.1. About IUCN

IUCN is a membership Union uniquely composed of both government and civil society organisations. It provides public, private and non-governmental organisations with the knowledge and tools that enable human progress, economic development and nature conservation to take place together.

Headquartered in Switzerland, IUCN Secretariat comprises around 950 staff in more than 50 countries.

Created in 1948, IUCN is now the world's largest and most diverse environmental network, harnessing the knowledge, resources and reach of more than 1,300 Member organisations and some 10,000 experts. It is a leading provider of conservation data, assessments and analysis. Its broad membership enables IUCN to fill the role of incubator and trusted repository of best practices, tools and international standards.

IUCN provides a neutral space in which diverse stakeholders including governments, NGOs, scientists, businesses, local communities, indigenous peoples organisations and others can work together to forge and implement solutions to environmental challenges and achieve sustainable development.

Working with many partners and supporters, IUCN implements a large and diverse portfolio of conservation projects worldwide. Combining the latest science with the traditional knowledge of local communities, these projects work to reverse habitat loss, restore ecosystems and improve people's well-being.

www.iucn.org
<https://twitter.com/IUCN/>

1.2. Summary of the requirement

IUCN invites you to submit a Proposal for the *IUCN CRM migration*. The detailed description of the Requirement can be found in Part 2 of this RfP.

1.3. The procurement process

The following key dates apply to this RfP:

RfP Issue Date	23 May 2018
Confirmation of Intention to Bid	1 June 2018
RfP Closing Date and Time	11 June 2018 – 13h00 (CEST)

Estimated Contract Award Date	1 August 2018
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1.4. Conditions

IUCN is not bound in any way to enter into any contractual or other arrangement with any Proposer as a result of issuing this RfP. IUCN is under no obligation to accept the lowest priced Proposal or any Proposal. IUCN reserves the right to terminate the procurement process at any time prior to contract award. By participating in this RfP, Proposers accept the conditions set out in this RfP.

Proposers must sign the "Proposer's Declaration" and include it in their Proposal.

1.5. Queries and questions during the RfP period

Proposers are to direct any queries and questions regarding the RfP to the above IUCN Contact. No other IUCN personnel are to be contacted in relation to this RfP.

Proposers may submit their queries no later than 1 June 2018 – 13h00 (CEST).

As far as possible, IUCN will issue the responses to any questions, suitably anonymised, to all Proposers. If you consider the content of your question confidential, you must state this at the time the question is posed.

1.6. Amendments to RfP documents

IUCN may amend the RfP documents by issuing notices to that effect to all Proposers and may extend the RfP closing date and time if deemed appropriate.

1.7. Proposal lodgement methods and requirements

Proposers must submit their Proposal to IUCN no later than **13h00 (CEST) on 11 June 2018** by email to: gabriel.davila@iucn.org. The subject heading of the email shall be *RfP – IUCN CRM migration - [Proposer Name]*. Electronic copies are to be submitted in PDF format. Proposers may submit multiple emails (suitably annotated – e.g. Email 1 of 3) if attached files are deemed too large to suit a single email transmission.

IMPORTANT: Submitted documents must be password-protected so that they cannot be opened and read before the submission deadline. Please use the same password for all submitted documents. After the deadline has passed and no later than **21h00 (CEST) on 11 June 2018**, please send the relevant password to the same email address as used for submitting your Proposal. This will ensure a secure bid submission and opening process. Please **DO NOT** email the password before the deadline for Proposal submission.

Proposals must be prepared in English and in the format stated in Part 3 of this RfP.

1.8. Late and incomplete proposals

Any Proposal received by IUCN later than the stipulated RfP closing date and time, and any Proposal that is incomplete, will not be considered. There will be no allowance made by IUCN for any delays in transmission of the Proposal from Proposer to IUCN.

1.9. Withdrawals and changes to the proposal

Proposals may be withdrawn or changed at any time prior to the RfP closing date and time by written notice to the IUCN contact. No changes or withdrawals will be accepted after the RfP closing date and time.

1.10. Validity of proposals

Proposals submitted in response to this RfP are to remain valid for a period of 90 calendar days from the RfP closing date.

1.11. Evaluation of proposals

The evaluation of Proposals shall be carried out exclusively with regards to the evaluation criteria specified in part 3 of this RfP.

PART 2 – THE REQUIREMENT

2.1. Introduction

IUCN is looking for a partner to migrate the current Dynamics 2011 CRM to CiviCRM. This partner would focus on:

- Support Linux environments setup
- On premise installation of CiviCRM
- Configuration of CiviCRM to match current CRM's functionalities
- Configuration of aggregated database tables/views for integration with other systems
- Complete CRM data Migration
- Training for system administrators and super users

2.2. IUCN CRM

The aim of the IUCN CRM is to provide a centralized and global 360° view of IUCN constituents' general information and roles, as well as support to communication channels. The IUCN CRM stores data and metadata of IUCN constituents, and their relationships. The IUCN constituents include IUCN Members (Organizations), IUCN Congress participants, IUCN Commission members, IUCN Member organizations, secretariat staff, donors, partners, media organizations, providers, newsletter subscribers, etc.

2.3. Current CRM

2.3.1. Current system

- Microsoft Dynamics CRM 2011 installed on premise
- Microsoft Dynamics CRM 2011 E-mail router (for Exchange 2010)
- Windows server 2012 and SQL server 2008

2.3.2. Existing entities

Entity name <i>Description</i>	Records (approx.)
Activities <i>Constituent interaction with the Secretariat Staff that are CRM users. Include Emails, Email Attachments, etc.</i>	100,000+
Contacts <i>People – Representatives from Member organizations, Commission members, secretariat staff, partners staff, media contacts, congress participants</i>	40,000
Leads <i>People – Newsletter subscribers</i>	37,000
Organizations <i>Member organizations, Member committees, donors, partners, media, service providers</i>	8,000
Commissions <i>IUCN Commissions for each quadrennial period</i>	18
Commission Groups <i>Thematic, regional and organizational groups related to IUCN Commissions (for each quadrennial period)</i>	1,000
Council <i>IUCN Council for each quadrennial period</i>	3
Council Groups <i>Thematic groups related to IUCN Council (for each quadrennial period)</i>	50

Event Registrations <i>Registration record for each participant to the last past IUCN Congresses</i>	13,000
Event Accreditations <i>Accreditation record for each IUCN Member participating in the past IUCN Congresses</i>	3,000
Electronic Vote Accreditations <i>Accreditation record for each IUCN Member participating in electronic votings</i>	5,000
Member Applications <i>Data provided by potential IUCN Members</i>	500
Campaigns <i>E-mail campaigns</i>	3,000
Lists <i>Marketing lists used for e-mail campaigns</i>	2,000
Topics <i>Keyword list used to classify contacts and organizations (expertise, taxonomy, etc.)</i>	600
Countries <i>List of officially recognized countries (statutory states) and territories</i>	240
Regions <i>List of officially recognized regions (statutory, operational, commission)</i>	70
Connections <i>Entity to define relationship between entities including the roles to and from each entity (116 different roles in use)</i>	140,000

2.3.3. Current functionalities

- Creation and edition of entities
- Creation and edition of connections between entities
- Browse/search entities
- Advanced search combining properties from one entity with properties of additional connected entities
- Export of search and advance search results
- Data import using system templates
- Mass data manipulation using data exports/imports
- Creation and edition of dynamic (query based) and static marketing lists
- Creation and edition of e-mail campaigns
- Delivery of bulk e-mail campaigns
- Tracking of e-mails from MS Outlook and Exchange 2016.

2.3.3. Current user base

The IUCN CRM is used by some 120 secretariat staff in multiple locations around the world. Users are divided in 14 teams, and some 20 security roles have been defined.

2.3.4 Current integrations

The IUCN CRM is currently integrated with the following internal systems:

System	Action
Exchange Server	Read/Write
Active Directory	Read
Human Resources Management System	Read
ERP	Read/Write
External User Management	Write

Extranet	Read/Write
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Additionally the IUCN CRM is currently integrated with the following external system:

System	Action
Dotmailer (email edition & bulk mailing tool)	Read/Write

2.4. CRM migration scope of work

2.4.1. Linux environment

The contractor will support the IUCN infrastructure team in setting up a state-of-the-art Linux-based environment to run CiviCRM on premise. The contractor will communicate their preferred Linux distribution, installation, required configurations and share best practices to ensure performance, security, and reliability.

2.4.2. CiviCRM installation

The contractor will install three CiviCRM environments (dev, test, prod). IUCN's preferred solution is CiviCRM for Drupal installation. The installation includes the database as well as the Drupal core. The contractor will also deliver detailed documentation of the installation.

2.4.3. CiviCRM configuration

The contractor will be responsible for configuring CiviCRM to match the current functionalities (view current functionalities list above). If proposed by the contractor and to better match the CiviCRM framework, the entities on the new system can vary from the current ones as long as the functionalities are replicated and no data is lost. User access configuration should also be replicated. The contractor will also deliver detailed documentation of the configuration.

2.4.4. Aggregated database tables/views

Various IUCN systems consume CRM data from intermediate database tables. IUCN's team will be responsible to replicate the integration between CiviCRM and other internal system but will require the support from the contractor with developing aggregated database tables (or views) for contacts, organisations and connections. These tables must contain all required data for the integration with other systems.

2.4.5. Complete CRM data migration

While the contractor will be responsible for the data migration, IUCN will provide all data extractions in the format requested by the contractor. All data from the above mentioned entities must be migrated to the new CiviCRM. If required, some existing entities may be merged to better match the CiviCRM framework, but it is imperative that no data is lost during the migration. Special consideration should be given to the over 140k connections that relate entities together.

2.4.6. Training

The contractor will conduct training sessions for up to 4 system administrators and for up to 10 super users. All training material (tutorials, guides, documentation, etc.) either generic or customized for this installation will be provided by the contractor.

2.5. Additional services

2.5.1. Post deployment maintenance

Post deployment maintenance includes system updates, security patches and bug fixing. Based on their experience with CiviCRM, the contractor should provide a CiviCRM maintenance plan including an estimated number of hours per month. Please note the maintenance includes three CiviCRM environments (dev, test, prod).

2.5.1. Further developments

Once the IUCN CiviCRM is up and running, IUCN may require assistance from the contractor to extend the CiviCRM functionalities to better support internal processes (e.g. Members applications, Commission management, etc). Given the uncertainties of these potential developments at this point in time, the contractor is asked to provide their consultancy/development daily rate.

PART 3 – THE EVALUATION MODEL

3.1. Prequalification criteria

The proposals will first be evaluated with regards to the prequalification criteria as indicated in the table below.

Criterion	Scoring method
Annex I: proposer's declaration	
Completed and all details provided	yes/no
No reasons for exclusion indicated	yes/no
4.2. Technical information	
Experience with CiviCRM	yes/no
Experience with CRM system migration	yes/no
Experience with CRM data migration	yes/no
Experience working with International Organizations	yes/no

A positive answer to all criteria is required for the proposal to be shortlisted.

3.2. Proposal evaluation

The evaluation of shortlisted proposals will be carried out with regards to the technical evaluation as indicated in the table below.

The financial evaluation will be based upon the full fixed price for the *CRM migration scope of work*, the *yearly maintenance rate* and the rate for *25 consultancy/development days* as defined by the proposer in their proposal (the bid price). A Price score up to a maximum of 40 will be assigned to each Proposal.

Proposal prices will be normalised by dividing the lowest bid price value by the bid's price value, and this value turned into a Price score. Thus: bid's normalised Price score = (lowest bid value / bid's value) * 40

Criterion	Scoring method
4.2. Technical information	
Relevant case study	Score 0 - 10
Positive and relevant references	Score 0 - 5
Indicated success factors	Score 0 - 5
Project management approach	Score 0 - 5
CiviCRM experience	Score 0 - 20
Drupal experience	Score 0 - 5
Project plan	Score 0 - 10
4.3. Pricing information	
Price score	Score 0 - 40

The contract will be awarded to the proposal which has obtained the highest total score provided the cost is within the available budget for this project.

PART 4 – INFORMATION TO BE PROVIDED BY PROPOSERS

By participating in this RfP, Proposers are indicating their acceptance to be bound by the conditions set out in this RfP.

This Part details all the information Proposers are required to provide to IUCN. Submitted information will be used in the evaluation of Proposals. Proposers are discouraged from sending additional information, such as sales brochures, that are not specifically requested.

Each of the following must be submitted as a separate document, and will be evaluated separately.

4.1. Declaration

Please read and sign the Declaration in **Annex 1** and include this in your proposal.

4.2. Technical information

Please provide brief answers to the below questions about your technical and/or professional ability.

- i. Provide a case study for a relevant/similar project your company was directly involved. It can be an attached document or URL to an online document/web page.
- ii. Based on your previous experience, identify the most important factors that have made projects similar to the Requirement a success and describe any pitfalls encountered and how you addressed these.

- iii. Provide details of the approach to project management that you have adopted in similar projects to the proposed Requirement. You may include any methodologies as well as specific tools you frequently use for communication and tracking progress.

- iv. Describe the specific CiviCRM experience of key staff who would potentially work on this contract.

Staff position	Years of CiviCRM experience	Area of expertise (installation, configuration, migration, custom development, integration with external systems, community contributions, other)

- v. Describe the specific Drupal experience of key staff who would potentially work on this contract.

Staff position	Years of Drupal experience	Area of expertise (installation, configuration, migration, custom development, integration with external systems, community contributions, other)

- vi. Provide a draft project plan for the Requirement. It can be an attached document or URL to an online document.

Additionally, proposers are required to submit the following details:

- **Website** of the Proposer.
- **Project portfolio** – preferably from projects including CiviCRM.
- **Additional services** – maintenance plan.
- **Optional services** – details of optional related services that the Proposer considers would help further improve the IUCN relationship with its constituents. Please note that these will not form part of the evaluation of Proposals and will only be used in the final contract negotiations with the selected Proposer.

4.3. Pricing information

Prices include all costs

Submitted rates and prices are deemed to include all costs, insurances, taxes, fees, expenses, liabilities, obligations, risk and other things necessary for the performance of the Requirement. Any charge not stated in the Proposal as being additional, will not be allowed as a charge against any transaction under any resultant Contract.

Applicable Goods and Services Taxes

Proposal rates and prices shall be exclusive of Value Added Tax.

Currency of proposed rates and prices

Unless otherwise indicated, all rates and prices submitted by Proposers shall be in **Swiss Francs (CHF)**.

Rates and Prices

Proposers should submit one fixed price for the *CRM migration scope of work* as described above.

Additional services, any required third party costs as well as optional costs should be presented separately.

Additional services costs **must** include:

- Yearly maintenance rate.
- Daily consultancy/development rate.

Third party costs (if applicable) **must** include:

- Third party services or licenses **required** to fulfil the *CRM migration scope of work* (e.g. licensed/paid modules, bulk email services, etc.)

Optional costs (if applicable) may include:

- Travel for face to face meetings or trainings; unless they are considered mandatory for the implementation in which case they should be included in the fixed price.
- Recommended improvements or additional functionalities not described in the *CRM migration scope of work*.
- Recommended third party services or licenses.

PART 5 – PROPOSED CONTRACT

Attached is the proposed Contract for IUCN CRM migration. Proposers acknowledge that this is a standard IUCN contract template and amendments to it will only be accepted in exceptional circumstances, at IUCN's discretion.

PART 6 – DEFINITIONS

For the purposes of this Request for Proposal (RfP) the following definitions apply:

Contract	Means any contract or other legal commitment that results from this Request for Proposals.
Contractor	Means the entity that forms a Contract with IUCN for provision of the Requirement.
Instructions	Means the instructions and conditions set out in Part 1 of this Request for Proposals.
IUCN	Means IUCN, International Union for Conservation of Nature and Natural Resources.
IUCN Contact	Means the person IUCN has nominated to be used exclusively for contact regarding this Request for Proposals and the Contract.
Proposal	Means a written offer submitted in response to this Request for Proposals.
Proposer	Means an entity that submits, or is invited to submit, a Proposal in response to this Request for Proposals.
Requirement	Means the supply to be made by the Contractor to IUCN in accordance with Part 2 of the RfP.
RfP	Request for Proposals