Request for Proposals (RfP)
Information Architecture – IUCN.org

IUCN Global Communications Unit

Issue Date: 14 May 2020
Closing Date and Time: 10 June 2020 23:59 CET

IUCN Contact:
Mark Gnadt
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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.

Created in 1948, IUCN is now the world’s largest and most diverse environmental network, harnessing the knowledge, resources and reach of more than 1,400 Member organisations and some 15,000 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. Headquartered in Switzerland, IUCN Secretariat comprises around 950 staff in more than 50 countries.

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

1.2. Summary of the Requirement

IUCN invites you to submit a Proposal for the provision of information architecture services for use when creating a new website to portray the Union to its various target audiences. The detailed description of the Requirement can be found in Part 2 of this RfP. This request is for the information architecture phase of the project only.

1.3. The procurement process

The following key dates apply to this RfP:

<table>
<thead>
<tr>
<th>RfP Issue Date</th>
<th>14 May 2020</th>
</tr>
</thead>
<tbody>
<tr>
<td>Submission of portfolio and pre-selection questions</td>
<td>27 May 2020, 23:59 CET (see section 4.1 for details)</td>
</tr>
<tr>
<td>Top ten candidates notified and invited to submit proposals</td>
<td>No later than 1 June 2020</td>
</tr>
</tbody>
</table>
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 3 June 17:00 CET.

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 you pose the question.

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 10 June 2020 23:59 CET by email to: mark.gnadt@iucn.org. The subject heading of the email shall be [RfP – Information architecture - [Proposer Name]]. Electronic copies are to be submitted in PDF and native (e.g. MS Word) 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 10:00 CET on 12 June 2020, 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. IUCN will not accept changes or withdrawals 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 and their relative weights specified in part 4 of this RfP.

**PART 2 – THE REQUIREMENT**

IUCN wishes to award a consultancy contract to an experienced website information architecture agency to provide stakeholder consultation, strategic advice and concrete proposals for a website architecture that will present the Union in a way that reinforces its desired positioning with key audiences. The architecture should improve user experience, allow both consistency across the various parts of the website while maintaining enough flexibility to ensure IUCN’s many distinct internal units and external audiences have intuitive ways to use and navigate the site.

The Contractor will be required to work according to the detailed Terms of Reference contained in the following sections. The Contractor must uphold high standards of professionalism in its work and interactions with IUCN internal and external stakeholders, including IUCN leadership.

**2.1 BACKGROUND**

IUCN is a large and complex organisation comprised of three main parts – IUCN Member organisations, IUCN Commissions and the IUCN Secretariat – each with unique roles, responsibilities and relationships within the Union, and in some cases, as individual entities. The size of the organisation and the diversity of its areas of work add to the complexity. IUCN has over 1400 Member organisations including states and government agencies, non-government organisations and indigenous people’s organisations from over 160 countries. The six Commissions have over 15,000 volunteer experts grouped in hundreds of specialist groups, and the Secretariat includes offices in over 50 countries and projects in more than 150.

In addition to region and country-specific work, IUCN also works on a wide range of topics, from species and protected areas conservation to gender, governance and rights, private sector engagement, freshwater, oceans, forests, environmental law and others. This diversity and depth of expertise and connection, from local to global, science to practice and policy, gives IUCN a unique claim to being the global authority on the status of the natural world and the measures needed to safeguard it. It also presents a tremendous challenge for presenting the Union in a website that is accessible, intuitive and strategic.

The IUCN website is the first, most visible and most comprehensive place where the world, and especially IUCN’s target audiences, see the Union and its work, impact and relevance. The current website structure reflects the IUCN Secretariat’s internal structure. This is not only out of date, but it also inhibits IUCN’s ability to present its overall unique value proposition as a Union and its relevance to broader global or crosscutting issues. At the next IUCN World Conservation Congress, IUCN Member organisations will adopt a new programme of work for the Union to begin in 2021, the same year IUCN hopes to launch its new website. The draft of this new programme will provide a starting point for IUCN’s vision and the structure for how IUCN organises and presents its work. Because of this, the draft programme will guide IUCN’s objectives for the website, but there are myriad possibilities for how that could look in the final architecture.

**2.1.1 Key audiences**

Unlike many of the most recognisable conservation organisations with broad public advocacy or fundraising efforts, IUCN operates in more of a business-to-business model. Its audiences are primarily those who engage with conservation and sustainable development in their professional work and those who could benefit from doing so but currently are not. While internal audiences use the IUCN website, its primary value is presenting IUCN’s value to external audiences. The structure, design and content of the website should prioritise these external audiences while still meeting the needs of internal audiences.
The IUCN website has a diverse external audience, and it is essential that the website allow each to find what it needs conveniently while reinforcing IUCN’s corporate positioning. The challenge for the website is to deliver to divergent audiences without letting efforts to reach one audience to inhibit efforts to reach another.

Broadly speaking, the IUCN website has two external audiences: (i) those who have little or some knowledge about IUCN or a topic and want to learn more, and (ii) those who come to the website looking for specific substantive information. Both need to find the right content and leave with a better understanding of IUCN’s value to the world.

The IUCN website audience is global, which means that not only is the audience divided by level of information required and the specific topics, but it is also divided by regional and national interests. Information must be accessible by topic and application, and by geographic relevance. As an international organisation with three official languages, IUCN should deliver its web content in all three languages.

Note the below definitions which may be helpful to understand the diversity in audiences:

1. **Policy makers**: Government and business leaders with the power to affect changes which benefit nature or benefit from it at international, national and sector-wide levels
2. **Potential partners**: Organisations which could benefit from IUCN’s work to advance conservation
3. **Nexternal**: Organisations or institutions whose work either has an impact on, or can benefit from, conservation knowledge and which do not currently know IUCN, but should.
4. **Media**: Journalists, publishers and other influencers who can amplify the impact of IUCN’s work, establish IUCN’s desired positioning and impart the relevance of conservation to other IUCN external audiences.
5. **Donors**: Most IUCN donors are government or multilateral institutions or foundations, often as part of foreign aid budgets. This funding can be framework or project-specific. IUCN also receives funding from individuals, particularly a small number of high net worth individuals, but contributions from the general public are essentially zero.
6. **Partners**: Organisations working with IUCN on specific projects or initiatives
7. **IUCN Members**: IUCN Members are *institutions or organisations*, such as States and agencies, INGOs and NGOs, Indigenous people organisations. When they become Members, they are encouraged to be part of NRCs (National and regional committees of Members) which can network and join forces and ideas at a national, respectively a regional level
8. **Potential Members or donors**: Entities as described in the Member and Donor definitions with whom IUCN would share a mutual benefit should they become a Member organisation or donor.
9. **IUCN Commissions / Experts / academia**: These experts are *individuals* researching or working directly in conservation or fields related to the natural sciences. It can include IUCN Commission members who provide science on a voluntary basis to IUCN.
10. **The IUCN Secretariat** includes staff paid by IUCN to implement the directives of Members and donors.
11. **The IUCN Council** is the governing body of IUCN operations and is elected by Members every four year during the IUCN World Conservation Congress.

The table below shows some of IUCN’s primary audiences and some needs regarding the website.

<table>
<thead>
<tr>
<th>PRIMARY AUDIENCES</th>
<th>NEEDS FROM THE WEBSITE</th>
</tr>
</thead>
</table>
| **EXTERNAL GROUP A** | Policy makers  
Potential Members or donors  
Potential partners  
“Nexternal” audiences  
Media | Understand IUCN, its authority, relevance and unique value proposition  
Find major outputs, tools, knowledge and analysis relevant to their work  
Find major outputs, tools, knowledge and analysis relevant to their geographic region  
News and press releases |
| **EXTERNAL GROUP B** | Donors  
Partners  
Conservation experts  
Academia | Understand IUCN, its authority, relevance and unique value proposition  
Results of specific work (by project/region/topic) |
2.2 SCOPE OF WORK AND ACTIVITIES

The activities in this RfP cover five main areas of work: strategic planning; stakeholder consultations; architecture sitemap development and refinement; wireframe development; and producing final deliverables.

2.2.1 STRATEGIC PLANNING

The Contractor will be required to provide strategic insights and advice into how to structure IUCN’s website to meet IUCN’s corporate objectives and to balance the various needs of its distinct stakeholder user groups. This will involve applying strategic digital communications experience to the objectives set by IUCN leadership and offering advice, options and assessment of trade-offs for how the website, especially its structure and content, could reflect IUCN priorities.

2.2.2 STAKEHOLDER CONSULTATIONS

IUCN developed a draft list of stakeholders to start the consultation process, but it relies on advice from the Contractor to review and refine the list in order to identify personas representative of the website’s diverse audience. Based on these personas, the Contractor will be required to work with several stakeholder groups within IUCN and with specific external audiences. The Contractor will conduct workshops or interviews to acquire relevant input from these groups. The Contractor will curate the information gathered, work with IUCN to organise and prioritise the inputs and produce a report summarising the inputs and offering recommendations for how to incorporate personas and/or user journeys into the website architecture.

2.2.3 ARCHITECTURE SITEMAP DEVELOPMENT AND REFINEMENT

The Contractor will develop a sitemap of the website architecture based on IUCN’s objectives and the relevant stakeholder input. The Contractor will revise this sitemap based on input from selected stakeholders and IUCN leadership and will support the Global Communications Unit with further adjustments to secure final approval for the architecture.

2.2.4 WIREFRAME DEVELOPMENT

The Contractor will work with the Global Communications Unit to develop wireframes. IUCN has identified a list of content types to start this process, but it will rely on advice from the contractor to review, refine and optimise this list based on relevant stakeholder inputs and the strategy underlying the new architecture. The Contractor will provide complete wireframes for key pages and will revise these wireframes based on input from key stakeholders. IUCN anticipates the website will need around 20-25 wireframes (7 to 10 content types, 5 to 9 types of landing pages, 3-4 menus, 1 search page, 1 catalogue page) to meet its diverse needs.
2.2.5 FINAL DELIVERABLES

- A summary report of strategic directions
- A summary report of workshops
- A sitemap presenting the information architecture
- Wireframes of all key pages
- An interactive prototype showing the new architecture and key pages

The Contractor will provide the sitemap, wireframes and interactive prototype in an online format that IUCN can easily share with IUCN stakeholders during the work, and subsequently with the design and development contractors during the following phases of the IUCN website project.

2.2.6 PROJECT MANAGEMENT

The Contractor will lead the project coordination including setting timelines and managing workshop, feedback and delivery schedules to meet deadlines. The Global Communications Unit will assist with internal IUCN coordination, but it will be the responsibility of the Contractor to manage the operations of the project to ensure quality and on-time delivery. Should IUCN require adjustments to the timeline, it will be the responsibility of the Contractor to adjust the project workflow accordingly to maximise the efficiency and delivery under the new deadlines.
2.3 Requirements

IUCN has done an initial analysis of the current website architecture and has developed preliminary ideas for regrouping and re-structuring the website. The overall goal is to make sure users get the appropriate mix of what they want from IUCN and what IUCN wants them to know. The Contractor will be responsible for applying its IA/UX/UI professional experience to challenge and augment these concepts. IUCN expects strategic and concrete advice that will move beyond the initial insights shared by IUCN toward a more strategic and user-friendly website. IUCN will assess the Contractor’s added value based on how well it applies the below requirements to the work provided as outlined in the Scope of Work.

Table 1: table of general requirements

<table>
<thead>
<tr>
<th>ID</th>
<th>Requirement</th>
<th>Description</th>
</tr>
</thead>
</table>
| R01 | Improve user experience                          | 1. Each user persona has an intuitive and efficient path to find desired information  
|     |                                                  | 2. IUCN work is accessible through geographic and thematic lenses, including cross-cutting themes which relate to several topics, e.g. climate change  
|     |                                                  | 3. IUCN work is accessible through purpose lenses (policy applications, technical tools, etc.)  
|     |                                                  | 4. Potential donors and partners can easily identify how to work with IUCN  
|     |                                                  | 5. Most relevant, up-to-date information is easiest to find  |
| R02 | Enhance IUCN desired positioning                 | a. Present unique value proposition of Union  
|     |                                                  | b. Show Union’s authority and credibility  
|     |                                                  | c. Show relevance of Union’s work to key audiences  
|     |                                                  | d. Show benefits of partnering with IUCN  
|     |                                                  | e. Present news, statements and other timely content  |
| R03 | Present work of Union’s individual parts and their connections to each other and to the Union as a whole | a. Members  
|     |                                                  | b. Commissions  
|     |                                                  | c. Secretariat (especially by Region)  
|     |                                                  | d. Key partners  |
| R04 | Incorporate relevant IUCN work currently on external websites based on a user-friendly perspective | a. Work with partners on databases / platforms e.g. conservation tools  
|     |                                                  | b. Specialty projects with budget to create websites but which could move content to new website  |

2.4 PREFERRED COMPETENCIES

The Contractor will have relevant experience in developing website architecture for large, complex, multinational and multi-lingual organisations, especially not for profit, government or other non-sales oriented websites. It should be able to understand and show IUCN’s desired corporate positioning through the website structure, shorten user journeys from point of entry to desired information, and provide quality deliverables technically compatible with the needs of designers and developers in future stages of the website project. The Contractor should have experience providing and leading quality, engaging and effective workshops with diverse stakeholders, including with top leadership and other key audiences. It
should have experience providing in-person and remote workshops as well as proven methods of soliciting, curating and prioritising stakeholder input through surveys, interviews or other means. The Contractor should have efficient means of cloud-based project management allowing convenient access for clients to track progress and provide input.

2.5 DURATION OF THE ASSIGNMENT

IUCN will work with the Contractor to determine the duration of the assignment. IUCN intends to move into the development phase of the project in Q4 2020. Therefore, the Contractor should provide near-final preliminary versions of all deliverables by end of Q3 2020.

The Final and curated deliverables must be made available latest by end of October 2020.

2.6 TRAVEL TO AND FROM IUCN HEADQUARTERS

All related travel, lodging and subsistence costs to, from and during any stay in Switzerland for workshops or other required meetings will be covered by the project as described in section 3.3 of this document. Please note that IUCN intends for most meetings to be virtual due to safety measures currently in place in Switzerland. All travel and in-person meetings will be contingent on health, safety and travel regulations in place at the time of the proposed meetings.

2.7 LANGUAGE

English will be the working language during the consultation meetings. The Contractor and its project staff should have a working understanding of English as it will not always be possible for IUCN to provide instructions or updates in other languages.
PART 3 – 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.

This procurement includes two phases (for dates, please see section 1.3):

1. **Pre-selection**: Interested Proposers must submit their Portfolio of relevant work and answers to the pre-selection questions (as per the details in Part 3).
2. **Technical proposals**: Based on the Pre-selection submissions, IUCN will select up to top ten candidates to submit full Proposals.

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

### 3.1 Pre-selection

1. Declaration: Please read and sign the Declaration and include this in your submission.
2. Portfolio: Three examples of Information Architecture work performed by the Proposer (including all phases listed under 2.2 of this RfP). The examples should reflect projects of a similar nature to the one in this RfP and indicate whether the website is currently live or forthcoming.
3. Written answers to pre-selection questions:
   a. How long has the Proposer been delivering services similar to those in this RfP?
   b. How many employees does the Proposer have and where are they based?
   c. How many employees would you allocate to this project?
   d. What is your core business as a company?
   e. Are you able to provide all elements of this RfP in-house? If not, please clarify which elements would be outsourced and relationship with any sub-contractors.
   f. Why are you best placed to help IUCN meet their objectives for an improved Information Architecture for a new [www.iucn.org](http://www.iucn.org) website?

### 3.2 Technical information/Service Proposal

After the pre-selection process, Proposers invited to submit full proposals for this RfP are required to submit the following details in their technical proposal:

i. **Description of approach** and implementation plan, including:
   - the overall principles and IA/UX/UI best practices the Proposer would apply to address the needs of this complicated website project
   - Overall implementation plan for the project including timeline, interim deliverables or steps to facilitate the process and final deliverables

ii. **Description of proposed consultation processes** and systems for facilitating strategic direction and engaging relevant stakeholders, including:
   - proposed process for identifying, refining and prioritising user personas (Note, IUCN has identified a preliminary list of 8 personas and will share that list with the Contractor upon signing the contract for this work)
   - options for in-person and remote consultations
iii. **Description of methods and systems used to build information architecture** of a complex website, including:

- the overall methods, tools and design techniques the Proposer would apply to build a strong information architecture for IUCN
- the overall approach that would prevent the IUCN website from growing organically into an overly complex and unfriendly website in 5 years. This part should include visual examples from past work as relevant.

iv. **Demonstration of experience** in website information architecture for large, complex organisations. This must include:

- links to a maximum of 3 examples of relevant website architecture work
- descriptions of each example including key strategic challenges and how the Proposer helped overcome them
- specific description of how, in similar past projects, the Proposer balanced user-based priorities, strategic objectives defined by management and communication priorities and provided information to organisation leaders to help them make strategic decisions

v. **Description of the team** proposed to work on this project including relevant experience and roles of each person

vi. **Pricing information** as described in section 3.3 of this RfP

### 3.3 Pricing information

**Prices include all costs**

Financial evaluation will be based on the lump sum cost of each proposal. Proposers are asked to submit a detailed breakdown of costs by main phases of the project as outlined in section 2.2 of this RfP.

For information and clarity, Proposers should also state the hourly rates for the staff assigned to the project as described in section 3.2.v above. The Proposer should make note of any differentiation in costs for different categories of staff it will bring to perform the requirements of this RfP. These figures may be used in future contract negotiations, if necessary, regarding additional work required.

Rates and prices submitted in the proposal are deemed to include all costs, insurances, taxes, fees, expenses, liabilities, obligations, risk and other things necessary for the performance of the Requirement, including all travel expenses to, from and during the time in Gland, Switzerland required to execute the obligations of this RfP. 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**

All rates and prices submitted by Proposers shall be in Swiss Francs.
PART 4 – THE EVALUATION MODEL

IUCN will evaluate proposals exclusively with regards to the evaluation criteria and their relative weights specified in the tables below:

4.1. Pre-Selection

<table>
<thead>
<tr>
<th>Pre-Selection criteria</th>
<th>Score</th>
<th>Weighting</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Signed Declaration</td>
<td>Y/N</td>
<td>n/a</td>
<td>n/a</td>
</tr>
<tr>
<td>2 Quality and relevance of Portfolio</td>
<td>1-5</td>
<td>10</td>
<td>50</td>
</tr>
<tr>
<td>3 Capacity, relevant expertise for this type and size project</td>
<td>1-5</td>
<td>10</td>
<td>50</td>
</tr>
<tr>
<td><strong>Total Pre-selection Score</strong></td>
<td></td>
<td></td>
<td><strong>100</strong></td>
</tr>
</tbody>
</table>

4.2. Technical evaluation of Proposals

<table>
<thead>
<tr>
<th>Evaluation criteria</th>
<th>score</th>
<th>weight</th>
<th>Maximum points (and threshold)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Approach and implementation plan</td>
<td>1-5</td>
<td>6</td>
<td>30</td>
</tr>
<tr>
<td>2. Quality of processes and systems to collect stakeholder information</td>
<td>1-5</td>
<td>4</td>
<td>20</td>
</tr>
<tr>
<td>3. Quality of methods and systems used to build information architecture of a complex website</td>
<td>1-5</td>
<td>4</td>
<td>20</td>
</tr>
<tr>
<td>4. Experience as demonstrated by relevant portfolios of work of the supplier in handling projects of similar scope and size, including demonstrated ability to meet deadlines</td>
<td>1-5</td>
<td>3</td>
<td>15</td>
</tr>
<tr>
<td>5. Sufficient, relevant and competent staff assigned to the work.</td>
<td>1-5</td>
<td>3</td>
<td>15</td>
</tr>
<tr>
<td><strong>Total technical score</strong></td>
<td></td>
<td></td>
<td><strong>100</strong></td>
</tr>
</tbody>
</table>

Each criterion will be scored out of 5 (where 1 – Does not meet the requirements, 2 – Basic, 3 – Good, 4 – Very good, 5 – Outstanding). Any proposals scoring 1 in any criterion will not be considered further.

A minimum of 60 points (Quality Threshold) needs to be obtained in the Technical Score in order to be considered for financial evaluation.

4.3. Financial evaluation of Proposals

A Price Score (PS) is assigned to all Proposals applying the following formula: \( \text{PS} = 100 \times \frac{\text{LP}}{\text{PP}} \)

Where:

- \( \text{PS} \) is the Price Score of the offer under evaluation;
- \( \text{LP} \) is the lowest price amongst those Proposals that pass the technical threshold (see below);
- \( \text{PP} \) is the price of the Proposal under evaluation.
Proposals must earn at least 60 of a possible 100 points on technical criteria to be considered for the contract.

**4.4. Total score**

The Total Score will be the weighted sum of the Technical Score (70%) and Price Score (30%).

The contract will be awarded to the Proposal which has obtained the highest Total Score subject to the Proposal Conditions in Part 1 above, positive references from three referees familiar with the Proposer’s experience relevant to information architecture work, and the following caveat:

**IMPORTANT:** In the event that the Proposal achieving the highest Total Score is deemed not affordable, IUCN reserves the right to engage in direct negotiation with the 3 (three) highest-scoring Proposers to identify whether any – and, if so, which – aspects of the Requirement may be excluded in order to reduce the total price to an affordable level. In this case, the terms and criteria of the final selection will be communicated to the three highest-scoring Proposers prior to opening the negotiations.

**PART 5 – PROPOSED CONTRACT**

Annex 1 below is the proposed Contract for the IUCN website information architecture. IUCN reserves the right to amend the proposed Contract prior to signature but, in submitting a Proposal, Proposers acknowledge that this is a standard IUCN contract template and will only be amended 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**

- **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
ANNEX 1 – CONTRACT TEMPLATE

CONSULTANCY AGREEMENT
(the “Agreement”)

between

IUCN, International Union for Conservation of Nature and Natural Resources, an international association established under the laws of Switzerland, with its World Headquarters located at Rue Mauverney 28, 1196 Gland, Switzerland (hereafter “IUCN”),

and

[full legal name of other party], established under the laws of [name of country], with headquarters located at [address], [country] (hereafter “Consultant”)

IUCN and the Consultant shall be referred to herein individually as a “Party” and together as the “Parties”.

PREAMBLE

Whereas the mission of IUCN is to influence, encourage and assist societies throughout the world to conserve the integrity and diversity of nature and to ensure that any use of natural resources is equitable and ecologically sustainable;

Whereas IUCN wishes to obtain advisory and consulting services from the Consultant for providing strategic advice and information architecture for a new IUCN corporate website and the Consultant agrees to assist IUCN with such services under the terms and the conditions set forth in this Agreement.

Whereas the Consultant has represented to IUCN that it has the required expertise and experience;

Now therefore the Parties agree as follows:

1. SERVICES

1.1 The Consultant will provide strategic and technical advice, conduct stakeholder consultations and deliver a sitemap for the information architecture of a new IUCN website including wireframes of content types required within the architecture, perform the tasks and deliver the deliverables no later than the agreed deadline(s) as set out in the terms of reference attached as Annex I (the “Services”).

1.2 The Consultant will assign [name of the person(s) and title(s)] (the “Key Personnel”) to the performance of the Services on behalf of Consultant. The replacement of any Key Personnel must be approved in advance by IUCN in writing.
1.3 IUCN reserves the right to request any reports (progress, financial or otherwise additional to those required under the Agreement), which could be considered to be reasonably required to evidence satisfactory performance under the Agreement.

1.4 The Consultant shall not subcontract the Services to third parties without the prior written consent of IUCN. However the Consultant may under its own responsibility use the services of others provided such services are of an auxiliary or clerical nature.

2. TERM

This Agreement comes into effect on upon its signature by both Parties (the “Effective Date”) and will expire on [date] (the “Expiration Date”).

3. INDEPENDENT STATUS

3.1 The employees, directors or shareholders of the Consultant shall not be entitled to any pension, bonus or other fringe benefits from IUCN.

3.2 The Consultant shall have no authority to enter into contracts or to incur any other legally binding commitment on behalf of IUCN.

3.3 No employee, director or other representative of the Consultant shall hold him or herself out or permit itself to be held out as having authority to do or say anything on behalf of or in the name of IUCN.

3.4 The Consultant shall be solely and exclusively liable for any and all taxes, levies or dues required to be paid in any of the countries where this Agreement applies, on any amounts paid to the Consultant by IUCN and has sole responsibility for declaring such amounts to the relevant tax authorities.

4. OBLIGATIONS

1.1 The Consultant shall carry out its duties in an expert and diligent manner and to the best of its ability and shall promptly and faithfully comply with all lawful and reasonable requests which may be made by the IUCN Contact Person.

1.2 The Consultant shall give written or oral advice or information regarding the execution of the Services as and when required by IUCN.

1.3 In the case of illness or accident or a case of Force Majeure as described under clause 14.3 preventing the Key Personnel from performing the Services, the Consultant shall promptly notify IUCN in writing of impediment.

5. REMUNERATION

5.1 As full remuneration for the Services performed under the terms of this Agreement, IUCN shall pay the Consultant a fixed and firm lump sum of [currency/amount in numbers (amount spelled out in letters)] (“the Remuneration”) as follows:

5.1.1 A first instalment of [currency/amount in numbers (amount spelled out in letters)] corresponding to 30% of the Remuneration upon receipt of a signed copy of this Agreement together with a first invoice;

5.1.2 A second instalment of [currency/amount in numbers (amount spelled out in letters)] corresponding to 30% of the Remuneration upon completion of stakeholder consultations and upon satisfactory delivery of the consultation summary report, the strategic discussions summary report and a preliminary sitemap presenting the information architecture; and
5.1.3 A third and last instalment of [currency/amount in numbers (amount spelled out in letters)] corresponding to remaining 40% of the Remuneration upon satisfactory and timely completion and IUCN written acceptance of all Services as specified in Annex I.

5.2 If the tasks defined in the Agreement are not fulfilled to the satisfaction of IUCN within the requested time limit, IUCN reserves the right to withhold any further payments and recuperate any funds already paid for unfulfilled Services.

5.3 IUCN shall make payments to the Consultant’s bank account (to be opened in the name of the Consultant in the place where Consultant is established or where the Services are provided) as follows:

Complete Account name: [xxx]
Account type and currency: [xxx]
Bank name: [xxx]
Bank address: [xxx]
Account No.: [xxx]
SWIFT Code or other bank routing code: [xxx]
IBAN No: [xxx]

5.4 Funds that remain unused at the Expiration Date or termination date of this Agreement must be returned to IUCN within sixty (60) days following either of such dates, as applicable.

6. TRAVEL EXPENSES

6.1 All travel has to be approved by the IUCN Contact Person before any reservation is made.

6.2 The IUCN Travel Policy (June 2015) shall apply to all travel expenses and is available at https://www.iucn.org/corporate/finance/procurement/iucn-travel-policy.

7. CONSULTANT’S WARRANTIES AND UNDERTAKINGS

7.1 The Consultant warrants that its performance of the Services under the terms of this Agreement will not infringe on the rights of any third party or cause the Consultant to be in breach of any obligation towards a third party.

7.2 The Consultant shall maintain at its sole expense liability and any other relevant insurance covering the performance of this Agreement. IUCN may require the Consultant to provide to a certificate of insurance evidencing such coverage.

7.3 The Consultant represents and warrants that no part of the Remuneration shall be provided to, or used to support, individuals and organizations associated with terrorism as identified on any sanction list published by the European Union, the United States Government, the United Nations Security Council or other relevant agency or body.

8. CONFIDENTIALITY

8.1 The Consultant will not disclose or use, at any time during or subsequent to this Agreement, any confidential information of IUCN or any other non-public information relating to the business, financial, technical or other affairs of IUCN except as required by IUCN in connection with the Consultant’s performance of this Agreement or as required by law. In particular, but without prejudice to the generality of the foregoing, the Consultant shall keep confidential all Intellectual Property and know-how disclosed to him/her by IUCN, which becomes known to it during the period of this Agreement or which it develops or helps to develop in providing the Services to IUCN.

8.2 The Consultant shall:
8.2.1 not disclose to third parties without express prior written consent of IUCN the results of work performed as part of the provision of the Services;
8.2.2 disclose know-how and other confidential information of IUCN which is provided by IUCN to the Consultant for the purpose of carrying out the Services only to those persons necessary to accomplish the Services and only to the extent necessary for the proper performances of the Services.

8.3 The Consultant agrees to immediately notify IUCN in writing if it becomes aware of any disclosure in breach of the obligations of this clause 8. At the request of IUCN, the Consultant will take all steps necessary to prevent further disclosure.

9. PROPERTY OF RESULTS

All notes, memoranda, correspondence, records, documents and other tangible items made, by the Consultant in the course of providing the Services will be and remain at all times the property of IUCN. At any time, even after the termination of this Agreement, the Consultant shall, upon request, promptly deliver to IUCN all such tangible items which are in its possession or under its control and relate to IUCN, its business affairs and clients and/or the Services and Consultant may not make or retain copies.

10. INTELLECTUAL PROPERTY

10.1 Intellectual Property rights are any and all rights and prerogatives, registered or not, arising from the Swiss and international legislation on the protection of notably patents, design, trademark, as well as know-how and trade secrets.

10.2 All Intellectual Property rights conceived or made by the Consultant in the course of providing the Services will belong to IUCN and the Consultant hereby agrees to assign to IUCN or its nominee, with full title guarantee, all rights in and to any Intellectual Property resulting from the provision of the Services for the full duration of such rights, wherever in the world enforceable.

10.3 The Consultant confirms that IUCN shall have all rights of development, manufacture, promotion, distribution and exploitation in relation to the projects undertaken and products developed in the course of the provisions of the Services and the Intellectual Property created or arising from the provision of the Services.

11. LIABILITY

The Consultant agrees to indemnify and hold IUCN harmless from any and all losses and damages that IUCN may incur as a result of Consultant’s actions or omissions in rendering the Services or the breach of any of the Consultant’s obligations contained in this Agreement.

12. COMMUNICATION AND NOTICES

12.1 All correspondence and notices in connection with the implementation of this Agreement must be directed as follows:

<table>
<thead>
<tr>
<th>IUCN Contact Person</th>
<th>Consultant Contact Person</th>
</tr>
</thead>
<tbody>
<tr>
<td>[name]</td>
<td>[name]</td>
</tr>
<tr>
<td>[title]</td>
<td>[title]</td>
</tr>
<tr>
<td>[name of IUCN Programme/Office]</td>
<td>[address]</td>
</tr>
<tr>
<td>[address]</td>
<td>[phone]</td>
</tr>
<tr>
<td>[phone]</td>
<td>[email]</td>
</tr>
</tbody>
</table>


12.2 In case the Contact Person is being changed, the authorized representative of each Party shall notify the other Party in writing (email accepted).

13. FRAUD, CORRUPTION AND ETHICS

13.1 The Consultant shall comply with the terms of IUCN’s Code of Conduct and Professional Ethics for the Secretariat, available at http://cmsdata.iucn.org/downloads/code_of_conduct_and_professional_ethics.pdf, which by signing this Agreement, the Consultant confirms it has reviewed and accepted.

13.2 The Consultant shall comply with the standards of conduct set forth in IUCN’s Anti-fraud Policy, available at http://cmsdata.iucn.org/downloads/anti_fraud_policy.pdf, which by signing this Agreement, the Consultant confirms it has reviewed and accepted.

14. TERMINATION

14.1 Termination for cause

14.1.1 IUCN reserves the right to terminate this Agreement in whole or in part, upon written notice with immediate effect in the event that the Consultant:

i. has falsified or provided inaccurate, incomplete or misleading information in any documentation provided to IUCN;

ii. defaults in carrying out any of its obligations under this Agreement;

iii. has engaged in illegal acts, including, without limitation fraudulent or corrupt actions as defined in Code of Conduct and Professional Ethics for the Secretariat and IUCN’s Anti-fraud Policy (hereafter referred to as a “Fraud”);

iv. enters into liquidation or dissolution other than for the purpose of an amalgamation or reconstruction; or

v. ceases to carry on business, has a receiver or administrator appointed over all or any part of its assets or undertaking, enters into any composition or arrangement with its creditors or takes or suffers any similar action in consequence of a debt or other liability, or undergoes any process analogous to the foregoing in any jurisdiction throughout the world

14.1.2 If it is determined that the Consultant has committed Fraud in competing for or in the performance of this Agreement, all expenditures incurred under this Agreement shall be undue and the Consultant shall promptly reimburse IUCN for all expenditures incurred in the performance of this Agreement.

14.2 Termination for force majeure

The performance of this Agreement by either Party is subject to acts of God, war, government regulations, disaster, strikes (excluding strikes of respective Parties’ personnel), civil disorders, curtailment of transportation facilities, or other emergencies making it illegal or impossible for either Party to perform its obligations. This Agreement may be terminated unilaterally without compensation for any one or more of the foregoing reasons by written notice from one Party to the other.

14.3 Effects of Termination

In the event of termination under this article, the Consultant shall within thirty (30) days of termination, and at IUCN’s request:

14.3.1 to the extent possible, complete the Services subject to the Remuneration made available until the date of termination and stop all ongoing activities;
14.3.2 refund to IUCN any advance payments received in excess of the total expenditure incurred as evidenced in the invoices submitted to IUCN,

14.3.3 reimburse IUCN for any expenditures made in breach of the terms of this Agreement and

14.3.4 submit final technical and financial reports and any other materials, deliverables, works or other outputs created as at the date of termination under this Agreement.

15. APPLICABLE LAW AND DISPUTE RESOLUTION

15.1 The performance and interpretation of this Agreement will be subject exclusively to the laws of Switzerland, excluding its conflict of laws principles.

15.2 Any dispute arising out of or in relation with this Agreement that cannot be resolved amicably by the Parties or by way of mediation shall be submitted to the competent courts of Lausanne, Switzerland.

16. GENERAL PROVISIONS

16.1 This Agreement is the complete understanding between IUCN and the Consultant and replaces all other agreements and understandings in reference to the subject matter of this Agreement.

16.2 Any modification or amendment of this Agreement shall be in writing and shall become effective if and when signed by both Parties.

16.3 This Consultancy Agreement is non-exclusive. IUCN is free to consult other experts in the Consultant’s field of specialization.

16.4 This Agreement is personal to IUCN and the Consultant, and neither Party may sell, assign or transfer any duties, rights or interests created under this Agreement without the prior written consent of the other.

16.5 Either Party waives all and any rights of set-off against any payments due hereunder and agrees to pay all sums due hereunder regardless of any set-off or cross claim.

16.6 All provisions that logically ought to survive termination of this Agreement shall survive.

In witness whereof, the undersigned, being duly authorized to do so, have executed this Agreement in the English language in two (2) originals.

IUCN, International Union for Conservation of Nature and Natural Resources

[full name of OTHER PARTY]

Date: __________________________  Date: __________________________

[Name of representative]  [Name of representative]

[Position of representative]  [Position of representative]
ANNEXES

Annex 1 – Contractor proposal for IUCN website information architecture RfP