Specification of Requirements

Introduction

IUCN is looking for a partner to migrate IUCN’s current CiviCRM running on Drupal 7 to CiviCRM on Drupal 9. The responsibilities of the selected partner (contractor) would include:

- Support the installation and setup of Linux environments (Dev, Test and Prod)
- On premise installation of Drupal 9
- Configuration of Drupal 9 installation to match current functionalities
- On premise installation of CiviCRM on Drupal 9
- Configuration of CiviCRM to match current functionalities
- Migration of custom CiviCRM modules
- Complete CiviCRM data Migration

Current IUCN CiviCRM installation

Current system

- Drupal version 7.84 installed on premise
- CiviCRM version 5.35.2 installed on premise

Existing entities

<table>
<thead>
<tr>
<th>Entity name</th>
<th>Records (approx.)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Individuals</td>
<td>105,000</td>
</tr>
<tr>
<td>Individual subtypes</td>
<td>1</td>
</tr>
<tr>
<td>Organisations</td>
<td>11,000</td>
</tr>
<tr>
<td>Organisations subtypes</td>
<td>8</td>
</tr>
<tr>
<td>Relationships</td>
<td>330,000</td>
</tr>
<tr>
<td>Active relationship types</td>
<td>14</td>
</tr>
</tbody>
</table>
Current Drupal modules

- Automated Logout (autologout)
- Block (block)
- Chaos tools (ctools)
- CiviCRM (civicrm)
- CiviCRM Theme (civicrmtheme)
- CiviGroup Roles Sync (civicrm_group_roles)
- Clear Password Field (clear_password_field)
- Clientside Validation (clientside_validation)
- Clientside Validation Webform (clientside_validation_webform)
- Color (color)
- Comment (comment)
- Contextual links (contextual)
- Dashboard (dashboard)
- Database logging (dblog)
- Diff (diff)
- Diskfree (diskfree)
- Ejector Seat (ejectorseat)
- Email Confirm (email_confirm)
- Entity API (entity)
- Entity cache (entitycache)
- EU Cookie Compliance (eu_cookie_compliance)
- Field (field)
- Field Permissions (field_permissions)
- Field SQL storage (field_sql_storage)
- Field UI (field_ui)
- File (file)
- Filter (filter)
- Flood control (flood_control)
- Guardr Core (guardr_core)
- Help (help)
- Hide PHP Fatal Error (hide_php_fatal_error)
- Image (image)
- insertFrame (insertFrame)
- jQuery Update (jquery_update)
- LDAP Authentication (ldap_authentication)
- LDAP Authorization (ldap_authorization)
- LDAP Authorization - Drupal Roles (ldap_authorization_drupal_role)
- LDAP Servers (ldap_servers)
- LDAP User Module (ldap_user)
- Libraries (libraries)
- List (list)
- Locale (locale)
- Localization update (l10n_update)
- Login Security (login_security)
Current CiviCRM extensions

Community:
- Advanced Log Tables
- Option Values Importer
- Report Plus
- Contribution cancel actions
- Note Permissions
- Haystack - CiviCRM Theme
- Sendgrid Mailing
- CSV GUI Import to api
- ExtendedReport
- Email API
- Angular Profiles
- Contact Layout Editor
- FlexMailer
- Search Display Name
- Relationship Block
- Mosaico

Custom:
- IUCN CiviCRM
  - Styling adjustment
  - Show / Hide fields
  - Automations (i.e. set default values to custom fields)
  - Access restriction
  - Cron tasks
- IUCN Reports (~10 custom reports)
- IUCN Custom Searches (1 custom search)
- IUCN – Users
  - User information synchronisation between IUCN systems via REST

Current infrastructure
- Linux Debian version 10 « buster »
- Php version 7.3
- MariaDB version 5.2
- Nginx version 1.18.0

Migration scope of work

Linux environment
The contractor will support IUCN’s 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.
Drupal 9 and CiviCRM installation
The contractor will install three CiviCRM environments (dev, test, prod) running on Drupal 9. The installation includes the database as well as the Drupal core. The contractor will deliver detailed documentation of the installation.

Drupal 9 and CiviCRM configuration
The contractor will be responsible for configuring CiviCRM to match the current CiviCRM functionalities. The contractor will deliver detailed documentation of the configuration.

Migration of Custom extensions
The contractor will be responsible to adapt all CiviCRM Custom extensions to ensure they are compatible with the new installation running in Drupal 9.

CiviCRM Migration
The contractor will be responsible to migrate all data from IUCN’s CiviCRM to the new installation running in Drupal 9.

Additional services

Post-migration maintenance
Post-migration maintenance includes system updates, security patches and bug fixing. The contractor should provide a CiviCRM maintenance and support plan of up to 10 hours per month. Please note the maintenance includes the three CiviCRM environments (dev, test, prod).

Further developments
Once the IUCN CiviCRM is up and running, IUCN may require assistance from the contractor to extend the 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 rate for blocks of 50 hours of development time.

Initial contract, extensions and call-offs
IUCN will sign an initial contract for the CiviCRM Migration plus 12 months’ post-migration maintenance. The post-migration maintenance may be extended at IUCN’s sole discretion for additional 12-month periods up to a maximum of 48 months.

Further developments in blocks of 50 hours of development time will also be added at IUCN’s sole discretion as and when needed during the maintenance period.