IUCN headquarters, Global Information Systems

Issue Date: 13 February 2019

Closing Date and Time: 28 February 2019 (12h00 CET)

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.

[Links]

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

1.2. Summary of the Requirement

IUCN invites you to submit a Proposal for the web development for the Timesheet Management System. The detailed requirements can be found in Part 2 of this RfP.
1.3. The procurement process
The following key dates apply to this RfP:

<table>
<thead>
<tr>
<th>RfP Issue Date</th>
<th>13 February 2019</th>
</tr>
</thead>
<tbody>
<tr>
<td>RfP Closing Date and Time</td>
<td>28 February 2019 (12h00 CET)</td>
</tr>
<tr>
<td>Estimated Contract Award Date</td>
<td>18 March 2019</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 12h00 CET 18 February 2019.

As far as possible, IUCN will issue the responses to any questions, suitably anonymised, to all Proposers by publishing them on the IUCN website in the RfP section no later than 15h00 CET 21 February 2019. If you consider the content of you 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 12h00 CET on 28 February 2019 on by email to: nermina.tankovic@iucn.org. The subject heading of the email shall be [RfP – Web development TMS - [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 12h00 CET on 26 February 2019, 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 60 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 3 of this RfP.
PART 2 – THE REQUIREMENT

IUCN seeks a Contractor to develop the web based Timesheet management system (TMS), create a visually-appealing and user-friendly front-end web interface design based on the IUCN visual identity. The Contractor will be required to work according to the Terms of Reference contained in the following sections.

2.1. Background

The current project goal is to implement a Timesheet Management System for recording of staff time and charging the time to funding sources in the Secretariat.

Main project goals:
• Simplify the recording of time worked
• Integrate the recording of time with the charging of time to sources of funding via ERP (Microsoft Dynamics NAV)
• Improve time management and reduce duplication of tasks
• Enable Staff Resources planning

The implementation will cover all IUCN offices, with progressive rollout starting in Gland, Switzerland. IUCN is organized on a regional basis as well as maintaining several out posted offices.

Regions
• Asia
• Eastern / Southern Africa
• Eastern Europe and Central Asia
• Europe
• Mediterranean Cooperation Centre
• Meso America and Caribbean
• Oceania
• South America
• West / Central Africa
• West Asia

Headquarters and outposted offices
• Switzerland, Gland, Headquarters
• Germany, Bonn, Environmental Law Centre
• United Kingdom, Cambridge, Species Programme Office
• United States of America, New York, N.Y., Permanent Mission to the UN
• United States of America, Washington D.C., IUCN Washington DC Office

There are 1001 employees, out of which 298 are in the Headquarters in Gland. For the first phase of the project it is estimated that 55% of users will use the Timesheet management system.

2.2. Timesheet management system requirements

2.2.1. Current process
IUCN has a Time Management policy applicable worldwide.

The main process is focused on the recording time by an employee, approval process from the line manager, recording of the financial transaction and reporting on the budget vs. actual spent and tracking compliance.
Recording time by an employee: Employees record their time on an excel template timesheet. At the end of a calendar month, the employee prints the timesheet and signs it as an acknowledgement of the accuracy of the data on the sheet. The timesheet is then countersigned by the respective line manager.

Approval process from the line manager: Once signed by the line manager, the timesheet is forwarded to the Programme’s finance focal point who in turn prepares a Journal Voucher, adding in the charge out rates, also on an excel template.

Recording of the financial transaction: The finance focal points print the journal voucher, signs it and gets the approval of the respective budget manager on whose Programme the costs on the journal are to be debited. Based on the signed journal voucher and the signed timesheet, a finance officer posts the data on time charging to NAV. This is either done by direct entry in NAV or via journal imports from excel.

Reporting: Every month, several reports are distributed to various people that show, among other parameter, others, staff time recovered from projects. These include the Management Report distributed to senior management, Cost Centre reports distributed to budget holders, and Project reports produced via Jet reports either directly by the project managers themselves or with the help of their finance focal points.

2.2.2. Timesheet Management System Requirements

TMS should follow main principles and requirements listed below:

Principles for TMS
- Time recording by the employees in the secretariat
- Aggregation of daily time entries to a monthly total
- Workflow management that allows submission of a complete monthly time recording for approval by the employee’s line manager
- Approval by the line manager aligned with the month-end
  - Effective management of approval bottlenecks
- Period management that allows closing and opening of periods, and allows limited edits of closed periods by a limited number of people
- Management of various dimensions that time recording and charging is based on – i) Cost Centre, ii) Project, iii) Fund, iv) Activity code, v) Donor reporting codes if necessary, vii) Office
- Integration of time recording with time charging in NAV
- Integration with HR system employee ID, holidays, absences and charge out rates.

Global Requirements for TMS
1. The Timesheet Management system must be accessible from modern version of Internet Explorer, Chrome and Firefox browsers.
2. Common tasks such as time recording or approvals need to be available on mobile platform, either as a usable web app or a native application.
3. Integration with Active Directory for (1) authentication, (2) user management and (3) transfer of user properties (first name, last name, phone number, email address, line manager, unit, user’s picture and other attributes). Integration should also allow to retrieve Organization Units and/or groups and other information needs to be transferred and kept in sync with Active Directory.
4. Integration with SQL Server for transfer of business master data such as Project, Cost Centre, Award, Donor, Ledger, Activity code and Donor reporting codes and budget approval rules.
5. E-mail notifications have to be sent to users and line managers, e.g. requirement for approval, and close of period and other important changes.
6. Configuration should be preferred to customization (performing code changes). If there are code changes, these changes must follow the best practices. They must be documented, the source code given to IUCN and there must be no negative interactions with continuous upgrade cycles of the Timesheet Management System solution.
7. All work produced will be IUCN intellectual property.
Time Entry requirement: The user generates a Timesheet for himself/herself.

1. Ability for an employee to enter time and to input the following information:
   - In minimum units of ½ hour
   - Project Code
   - Activity Code
   - Donor Reporting code
   - Fund
   - Description
   - On behalf of someone else
2. Ability to convert hours entered into working days
3. Non-working days such as Weekends and holidays should be prefilled or taken from HRMS
4. Distinguish between billable and non-billable time
5. In line with local labour law, time worked over what is daily contractual (overtime) or non-working days should take into account any extra charge out rate and/or need to allow the employee an equivalent absence from work at a different time
6. Possibility of copying recurring data (eg. NAV Dimension, Project Codes, etc)
7. The ability to initiate a timesheet on behalf of someone else.
8. Ability to send reminders to users on predetermined points (e.g. 15th, 30th, and 4th day after period close)
9. Capability to link timesheets within one unit for the line manager to have a team overview
10. Capability for storing historical timesheets for at least 10 years including an audit log with updates and any edits
11. Ability to edit closed periods limited to a number of users (role based)
12. Allow Access for users seconded to other organizations
13. User can choose to receive an email any time their timesheet is updated.

Timesheet Approval Requirement

1. Approval workflows in line with DoA, line management and budget holders, including alternate approvers
2. Ability to record notes exchanged between an approver and a submitter where questions are raised
3. Overview of pending approvals and reports to enable management of bottlenecks
4. Approval e-mail template can show clear information to end approvers for easy of decision making
5. Ability to request for additional supporting information without necessarily disapproving a timesheet
6. Ability to transfer timesheets to Microsoft Dynamics NAV upon approval
7. Ability to support hierarchical escalation, either manually or via business rules, in case of absence of an approver.
8. Ability to add secondary line management (matrix based).
9. Ability to prevent approval before maximum work days in the period of approval are accounted for
10. Ability to lock data once approved
11. Ability to add secondary line management (matrix based).
12. Ability to prevent approval before maximum work days in the period of approval are accounted for
13. Ability to lock data once approved

Passwords

Employees should be able to use the passwords they use for other IUCN systems either through single sign on (SSO) feature or by directory server authentication (Microsoft Active Directory)
2.3. Scope of work

IUCN works on the development of the Timesheet management system and integration with other systems such as ERP (Microsoft Dynamics NAV) and in house built HR system.

Contractor’s scope of work includes the following areas:

1. development of the online system for time recording:
   a. design and create the forms for completing the time tracking sheets,
   b. design and create the forms for configuration of time tracking,
   c. develop the workflow approval and notification process
2. integration with the NAV and HRMS,
3. develop a dashboard for users and line managers based on the business requirements

Note: web design of all the forms and user interfaces must be in accordance with the IUCN visual identity.

2.5. Specific tasks

The Contractor is expected to provide support for the following tasks related to the development of an online, web based Timesheet management system:

Functional Expectations

- Develop technical solution for recording the time and implementing the workflow for the approval process in line with the functional requirements described under 2.2.
- Develop the users interface in line with the IUCN visual identity guidelines
- Provide clean and clear API for integration with other systems
- Conform to industry best practices

Communication

- Provide project updates to IUCN through regular status update meetings
- Update the development tasks progress in Jira as tasks are completed
- Track time on specific tasks in Jira on at least daily basis (using Tempo)

Quality Expectations

Security standards, such as basic general security and privacy configuration, user roles and permission configuration, robot files (.txt and .htaccess) configuration, restriction of certain files and sensitive documents, must be guaranteed.

Similarly, best practices in development and configuration must be followed in order to meet responsive requirements and provide compatibility with most common browsers in use.

2.6. Competencies

In addition to the above requirements, IUCN prefers Contractors which:

- Use git for version control for development, testing and production (IUCN git server)
- Use JIRA for project and development tracking
- Use Tempo/JIRA for tracking time on project
- Have experience and a strong track record with in deploying to IIS server
- Have experience and a strong track record with developing on .NET for application layer and MSSQL for database layer
- Ability to develop and deliver effective, performant and responsive modern UX
- Work efficiently using remote desktop for development and testing environment
• Have experience and a strong track record in developing integrations with ERP, AD and other systems
• Have experience and a strong track record with development of web based solutions for of similar size and complexity for Time management or Project management systems
• Demonstrate the ability and knowledge for advisory role during development of the Time management solution aiming the best system performance
• Demonstrates the ability to keep up to date with best practices for development of the online solutions and have knowledge of emerging technologies, standards, and trends related to development of the online solution for Time management or Project management systems
• Able to troubleshoot issues quickly and to stay up-to-date on current and emerging technologies, standards, and trends.

2.7. Duration of the assignment
Time is of the essence for the Timesheet management system developments as the project closing date is 02.10.2019. The duration of the contract is estimated to be from March to June 2019.

2.7 Language
All materials shall be produced in English, except as noted above where specific deliverables must also be in French and Spanish. English will be the working language during the consultation meetings.

PART 3 – THE EVALUATION MODEL

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

The evaluation of shortlisted proposals shall be carried out with regards to (1) price and (2) the technical evaluation criteria and their relative weights are specified in the table below:

<table>
<thead>
<tr>
<th>Evaluation criteria</th>
<th>Max. points</th>
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<tbody>
<tr>
<td>Price Score</td>
<td>40</td>
</tr>
<tr>
<td>Technical score</td>
<td>60</td>
</tr>
<tr>
<td>Total Score</td>
<td>100</td>
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All proposal prices will be normalised by dividing the lowest bid price value by that bid’s price value, and this value turned into a percentage (Financial Score). Thus: lowest bid value = CHF X; bid A’s value = CHF Y; bid A’s normalised financial score = (X / Y) * 100%

The Technical evaluation is to be based on the technical capability to be demonstrated in the table 4.2.:
Where the scoring method indicates “y/n”, this means that a “yes” answer is required in each case for the Response to be considered further.

The Technical Score will be multiplied by the Technical Weighting Factor (60%), the Financial Score multiplied by the Financial Weighting Factor (40%), and the two weighted scores added together to provide a Final Weighted Score for each bid (excluding those that achieve less than 50% on one or more Technical Criteria).

The top bids based on the above evaluation will be shortlisted and will be invited to give a presentation on their proposal.

The contract will be awarded to the Proposal which has obtained the highest total score.

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 criteria

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

   a. Provide a case study for relevant/similar project your company was directly involved with. It can be an attached document or URL to an online document/web page.

   b. For references, please provide details of previous experience of [3] relevant contracts in the last [3] years for the web based system solution, clearly indicating the level of involvement of the Proposer (design, development, IA, maintenance, else…), preferably from projects of similar size, complexity and quality demands. Projects should be listed in order of decreasing value (total lifetime costs).
Please provide the references, client name and email address, of the above specified projects. Please confirm that the specified clients have no objections to IUCN contacting them during the pre-qualification stage for reference purposes.

<table>
<thead>
<tr>
<th>Client name</th>
<th>Email address</th>
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</table>

**c.** Please explain project management methodology and approach that you have adopted in similar projects to the proposed Requirement.

**d.** Based on your previous experience, please 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.

**e.** Please state project resourcing (i) the total number of staff; (ii) detailed numbers of staff under relevant categories (e.g. development, project management, design, etc...), (iii) staff expertise for providing goods and/or services similar to those to be provided in relation to the Requirement.

<table>
<thead>
<tr>
<th>Staff position</th>
<th>Years of web development experience</th>
<th>Areas of expertise</th>
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<tbody>
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**Additional Services** – details of additional, related services that the Proposer considers would help further improve the TMS design and development. 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 CHF.

**Rates and Prices**

Proposers should submit one fixed hourly rate which applies to all work to be provided by the Proposer in fulfilling the tasks outlined in this RfP.

*Note*: in case different rates apply for different competencies, proposers can explicit these, but should still propose a fixed hourly rate for IUCN independent of the task to be conducted.

Proposers should mention **discounts** such as:

- any discount that can be applied for a specific volume of work
- any other applicable discounts.

Proposers should mention as well any additional costs that are not covered by the hourly rate.

Finally, proposers should list separately any costs associated with Additional Services (4.2) which are not covered by the fixed hourly rate.
PART 5 – PROPOSED CONTRACT
Annex II contains the draft proposed Contract to supply technical support for the IUCN Timesheet management system development. Proposers acknowledge that this template will be used as the basis for the final contract.
**PART 6 – DEFINITIONS**

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

<table>
<thead>
<tr>
<th>Term</th>
<th>Definition</th>
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</thead>
<tbody>
<tr>
<td>Contract</td>
<td>Means any contract or other legal commitment that results from this Request for Proposals.</td>
</tr>
<tr>
<td>Contractor</td>
<td>Means the entity that forms a Contract with IUCN for provision of the Requirement.</td>
</tr>
<tr>
<td>Instructions</td>
<td>Means the instructions and conditions set out in Part 1 of this Request for Proposals.</td>
</tr>
<tr>
<td>IUCN</td>
<td>Means IUCN, International Union for Conservation of Nature and Natural Resources.</td>
</tr>
<tr>
<td>IUCN Contact</td>
<td>Means the person IUCN has nominated to be used exclusively for contact regarding this Request for Proposals and the Contract.</td>
</tr>
<tr>
<td>Proposal</td>
<td>Means a written offer submitted in response to this Request for Proposals.</td>
</tr>
<tr>
<td>Proposer</td>
<td>Means an entity that submits, or is invited to submit, a Proposal in response to this Request for Proposals.</td>
</tr>
<tr>
<td>Requirement</td>
<td>Means the supply to be made by the Contractor to IUCN in accordance with Part 2 of the RfP.</td>
</tr>
<tr>
<td>RfP</td>
<td>Request for Proposals</td>
</tr>
<tr>
<td>TMS</td>
<td>Timesheet Management System</td>
</tr>
<tr>
<td>NAV</td>
<td>Microsoft Dynamics NAV</td>
</tr>
<tr>
<td>HRMS</td>
<td>Human Resources Management System</td>
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</tbody>
</table>