Request for Proposals

Title: CI GEF/GCF Project and Portfolio Management System
RFP No: CI-GEF-CI-GCF-FY22-001
Date of Issuance: October 1, 2021, Reposted November 9, 2021, Reposted December 13, 2021
RFP Revisions as of December 13, 2021: see changes in Sections 4 (Submission Details); 8 (Proposal Timeline); 9 (Resulting award date); Attachment 8 (Clarifications) numbers 11, 16, 93, 94, 95.

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1. **Background**

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

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

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

2. **Project Overview**

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

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

- **Program/ Portfolio Management:** Provide the ability to capture program (CI GEF/GCF Agency) level details for each project, including but not limited to, key internal and external contacts, total budget, key performance indicators and targets, risks, project stages.

- **High-Level Project Management:** Provide the ability to track the key elements of an individual project within the program such as description, category, current phase, internal and external contacts. Ability to provide templates of project artifacts like work plans and required approvals by project and project phase.

- **Work Plan and Deliverable Management:** For each stage of a project, provide the ability to develop a work plan that includes a multi-tiered structure for Components, Outcomes, Deliverables and Activities. Providing reporting capabilities against that work plan. Also provide the ability to track the approvals of all deliverables by project by phase.

- **Results Framework/Logical Framework:** For each project, provide the ability to track the results or logical framework that associates project outcomes and outputs to workplan activities. Additionally, for each project, provide the ability to identify the methods of measurement, baseline values, targets project impacts.

- **Safeguard Analysis and Mitigation:** For each project, provide the ability to capture safeguard analysis and mitigation plans and activities.

- **Risk Management:** Provide the ability to capture risks associated with programs, projects, project phases or individual safeguards as well as activities to manage risks.

- **Monitoring and Evaluation:** For each project and project phase, be able to report against both the workplan activities and the results framework impacts throughout the duration of the project. Additionally, be able to capture and report on evaluation activities and recommendations for the project.

- **Budget and Financial Management:** For each project and phase, provide the ability to capture summary budget information by component, cost category and year. Provide the ability to capture co-financing amounts with type and source.

- **Amendments and Change Requests:** For each project phase, provide the ability to request, review, and approve amendments to the project.

- **Applicant/Grantee Portal:** Provide the ability for executing entities to submit documents and information to the CI-GEF/GCF Agencies through the use of a grantee portal. The goal of the portal is to eliminate the need for sending of files and content through email to the greatest extent possible.

- **Document Management:** Provide the ability to associate files and documents to specific project phase deliverables, such as budgets, Safeguard plans, etc. Provide robust functionality to track submission of documents from applicants/grantees to CI-GEF/GCF

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

- **Approval Processes:** Provide the ability to track both Agency and Secretariat level approvals for specific funding requests and reports. Provide the ability to capture review comments that are clearly tied to file versions submitted.

- **Reporting and Dashboards:** Provide the ability to create reports and dashboards at the program, project and project phase level to assist with management and oversight of the portfolio.

- **Email or Messaging Functionality:** Provide the ability to track email and chat messages related to individual records within the PPM system.

- **Automatic Reminders and Alert Functionality:** Provide the ability to provide reminder emails to both internal and external users on upcoming deadlines and deliverables.

- **Integration with ConservationGrants:** Provide the ability to associate one or more grants in ConservationGrants to a project or project phase. Additionally, be able to streamline data entry between PPM and CG for common project level information as well as display summary information from Grants within PPM for details like reporting status, payment and expenditure data, and grant periods, etc. Additionally, determine how an executing entity would interact with a single portal.

- **Document Generation and Templates:** Provide the ability to generate standardized documents based upon GEF and GCF templates in Excel/ Word/PDF from the PPM system.

- **Technical Support Plans:** Provide the following items to facilitate technical support: Security Plan, Backup Plan, Ongoing Maintenance Plan and Integration Support.

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

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

GEF: https://www.thegef.org/documents/templates
GCF: https://www.greenclimate.fund/projects/process
CI-GEF Agency: https://www.conservation.org/gef
CI-GCF Agency: https://www.conservation.org/gcf

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

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

Number of Users and Roles
We currently expect a total of 25 CI-GEF/GCF Agency users with the following roles:
- Technical Leads
- Grants Manager/Coordinator
- Operations Lead
- Management
- System Administrators

The estimated number applicant/grantee users is 120.

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

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

Integration with ConservationGrants

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

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

At a minimum, the following data must be retained in ConservationGrants:
- Basic Grant Information, such as Grant Number, Grantee, Project Title, Period of Performance, Amount, etc.
- Financial and Operations award screening and approvals
- Schedule of Required Grantee Reports and Report Status
- Financial Report Expenditures
- Grant Payments
- Grant Amendment Information

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

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

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

3. **Scope of Work, Deliverables and Deliverables Schedule**
   - Deliverables and Deliverable Schedule - See Terms of Reference as Attachment 2
   - Functional and Technical Requirements - See Attachment 3

4. **Submission Details**
   a. Deadline. Proposals must be received no later than **January 31, 2022, at 11:59PM EST (UTC-05:00).** Late submissions will not be accepted. Proposals must be submitted via email to **cigef@conservation.org**. All proposals are to be submitted following the guidelines listed in this RFP.

   b. Validity of bid. 120 days from the submission deadline

   c. Clarifications. **CI will host a live Q&A webinar on January 5, 2022 at 2:00-3:00pm EST**. Link to Q&A webinar here. Questions for the Q&A session may be submitted to cigef@conservation.org before 5pm EST, Jan 3, or they may be asked live during the session. The Q&A will be recorded, and the recording will be posted to this RFP. For e-mailed questions, the subject of the email must contain the RFP number and title of the RFP. Because we are hosting the live Q&A, after December 13, no additional questions and answers will be added to the RFP.

   d. Amendments. If at any time prior to the deadline for submission of proposals, CI may, for any reason, modify the RFP documents by amendment which will be posted to the CI website and/or communicated via email.

5. **Minimum Requirements**
   a. Technical Requirements – The technical proposal must include confirmation that the proposed solution will meet the following technical requirements:

      - Based on Salesforce platform, either built on native Salesforce functionality or add-on applications or a combination of both
      - Ability to Integrate with ConservationGrants, either in the existing Salesforce organization or a new Salesforce organization that is integrated
      - Ability to integrate with Sharepoint

- Functions in geographic areas with low connectivity and bandwidth
- Applications have demonstrated security and service reliability
- Applications offer a customer support portal that includes documentation plus access to user support technicians
- Applications offer periodic enhancements and updates based upon customer requests and Salesforce platform updates
- Solution can be supported by a wide variety of external partners (i.e., knowledge to administer platform is not proprietary to a single partner)

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

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

      Solution Met By:
      - Salesforce Core Functionality
      - Salesforce Configuration
      - Third Party Application
      - Custom Code
      - Not met

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

iii. Implementation Partner Solution Recommendation
- Names of proposed platforms and implementation partner, plus contact information.
- Diagram of proposed solution platforms if multiple Salesforce environments and applications are recommended to meet requirements and use cases.
- A Written Information Security Plan (WISP) that is publicly available, for non-Salesforce applications.
- Confirmation of having an Incident Response Plan (IRP). If not publicly available, please provide the SOC 1 or SOC 2 reports to confirm the existence of an IRP for non-Salesforce applications.
- Written description of data backup recommendations
- Description of ongoing maintenance requirements of the proposed solution, including recommended staff hours to support expected user base.
- Provide the Service Level Agreement and an estimated meantime to recovery for all non-Salesforce applications.
- Provide information on whether Diversity Equity and Inclusion principles are incorporated into system design.

iv. Implementation Methodology including
- Description of the high-level methodology and process
- Roles and responsibilities of implementation partner
- Roles and responsibilities of CI and estimated level of effort required; and
- Standard artifacts that are generated as part of your methodology, such as use case templates, UAT test scripts, configuration/technical design documents
- Standard meeting schedule
- Estimated timeline for project implementation
- High level description of data migration strategy and delineation of roles between CI and implementor
- Description of administrator and end-user training approach

v. Implementation Partner Experience including
- Corporate Capabilities, Experience, Past Performance, and 3 client references. Please include descriptions of similar projects or assignments and at least three client references.
- Staffing plan and Personnel Qualifications. Please propose how the project will be staffed. Attach CVs of personnel proposed for the project that demonstrate how the team proposed meets the minimum requirements listed in section 5 (Minimum Requirements).

e. Financial Proposal. Offerors shall use the cost proposal template **(Attachment 4)** following the instructions and submitted as an Excel file.

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

Stage 1: Minimum Requirements
A platform and implementation partner who meet the following criteria will be selected as finalists for live demonstrations in January of 2022:

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

Stage 2: Live Demonstrations
The finalists who meet the initial criteria, will conduct live demonstrations, one focused on the technical components and data security, the other focused on how the solution meets the functional requirements. Finalists will be asked to interview with CI for 60 minutes with a focus on system architecture, application, and data security. Additionally, finalists will be invited to an 120 minute system demonstration focused on how the solution meets the functional requirements. Finalists requested to interview will be required to sign a Non-Disclosure Agreement (NDA).

Stage 3: Full Proposal Scoring
The award will be made to the offeror whose proposal is determined to be responsive to this solicitation document, meets the minimum requirements stated in this RFP, meets the technical capability requirements, and is determined to represent the most advantageous to CI. Scoring will be based on the following criteria:

Evaluation Criteria	Percentage
Technical Platform • Meets or exceeds technical requirements outlined above, including application and data security and privacy requirements • Meets use cases • Ongoing maintenance needs to ensure compliance with Salesforce updates are reasonable • Quality of end-user experience • Integrates with ConservationGrants and SharePoint	40

• Customer support portal that includes documentation • Strong references asserting above findings • Clear and reasonable contract lengths	
Implementation partner • Possesses experienced staff and resources to successfully develop solution • Proven strategic and technical expertise • Understanding of current industry best practices and applicable privacy / data security requirements • Compatible project management methodology • Proven track record building solutions for large, international nonprofits • Strong references verifying above qualities	25
Pricing • Initial software fees are reasonable • Annual licensing fees are reasonable • Implementation fees are reasonable • Ongoing maintenance costs are reasonable • 5-year total cost of ownership	25
CI Resource Needs • CI staff time and expertise to implement the system is reasonable • CI staff time and expertise to maintain the system is reasonable	10

8. Proposal Timeline

RFP Issued	1 October 2021
Clarifications submitted to CI	8 October 2021
Clarifications provided to known bidders	15 October 2021
RFP Reposted	November 9, 2021
Second Round Clarifications to be submitted to CI	November 19, 2021
Second Round Clarifications known to bidders	November 30, 2021
RFP Reposted for a second time	December 13, 2021
Live Q&A Webinar	January 5, 2022, 2:00-3:00 PM EST
Proposals Due (new deadline)	January 31, 2022
Demonstrations	February 28, 2022 – March 11, 2022
Final selection	March 31, 2022
Contract Finalized	April 29, 2022
Work Begins	May 2, 2022

9. **Resulting Award** CI anticipates entering into an agreement with the selected bidder by **April 29, 2022**. The successful bidder will have to agree to enter into contractual terms based on CI's standard agreement templates for provision of services and/or the development of software systems and CI's template global data processing and security addendum, the terms of which are non-negotiable.

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

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

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

12. **Attachments:**

    Attachment 1: Representation of Transparency, Integrity, Environmental and Social Responsibility
    Attachment 2: Terms of Reference
    Attachment 3: Functional and Technical Requirements
    Attachment 4: Cost Proposal Template
    Attachment 5: Global Data Processing and Security Addendum
    Attachment 6: Vendor Security Management Questionnaire
    Attachment 7: Terms of Service for Development of Software Systems
    Attachment 8: Clarifications made by CI

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

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

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

I.   **With respect to CI's Code of Ethics, we certify:**
   a.   We understand and accept that CI, its contractual partners, grantees and other parties with whom we work are expected to commit to the highest standards of Transparency, Fairness, and Integrity in procurement.

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

   a.   We are committed to high standards of ethics and integrity and compliance with all applicable laws across our operations, including prohibition of actions that facilitate trafficking in persons, child labor, forced labor, sexual abuse, exploitation or harassment. We respect internationally proclaimed human rights and take no action that contributes to the infringement of human rights. We protect those who are most vulnerable to infringements of their rights and the ecosystems that sustain them.

   b.   We fully respect and enforce the environmental and social standards recognized by the international community, including the fundamental conventions of International Labour Organization (ILO) and international conventions for the protection of the environment, in line with the laws and regulations applicable to the country where the contract is to be performed.

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

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

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

f. We have taken no action nor will we take any action to limit or restrict access of other companies, organizations or individuals to participate in the competitive bidding process launched by CI.

g. We have fulfilled our obligations relating to the payment of social security contributions or taxes in accordance with the legal provisions of the country where the contract is to be performed.

h. We have not provided, and will take all reasonable steps to ensure that we do not and will not knowingly provide, material support or resources to any individual or entity that commits, attempts to commit, advocates, facilitates, or participates in terrorist acts, or has committed, attempted to commit, facilitate, or participated in terrorist acts, and we are compliant with all applicable Counter-Terrorist Financing and Anti-Money Laundering laws (including USA Patriot Act and U.S. Executive Order 13224).

i. We certify that neither we nor our directors, officers, key employees or beneficial owners are included in any list of financial or economic sanctions, debarment or suspension adopted by the United States, United Nations, the European Union, the World Bank, or General Services Administration's List of Parties Excluded from Federal Procurement or Non-procurement programs in accordance with E.O.s 12549 and 12689, "Debarment and Suspension".

Name: _____

Signature: _____

Title: _____

Date: _____

Attachment 2: Terms of Reference

<u>Scope of Work</u>

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

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

> **Component #1** – Detailed Requirements Analysis, User Story Development, and Sprint/Release Plans
>
> The vendor will review program collateral and interview key stakeholders to refine system requirements and define process flows. Deliverables of the requirements phase include a detailed system architecture design and implementation user stories, including point estimation.
>
> **Component #2** – System Installation, Configuration/Development, Testing and Implementation of User Stories
> The vendor will design, develop, test and deliver system components based upon approved use cases using an agile methodology. The vendor will be responsible for unit and QA testing of stories prior to user acceptance testing.
>
> **Component #3** - Integration with Microsoft O365 Sharepoint
> The vendor will design, develop, test and deliver integration components based upon approved use cases using an agile methodology. The vendor will be responsible for unit and QA testing of stories prior to user acceptance testing.
>
> **Component #4** - Integration with ConservationGrants
> The vendor will design, develop, test and deliver integration components based upon approved use cases using an agile methodology. The vendor will be responsible for unit and QA testing of stories prior to user acceptance testing.
>
> **Component #5** – Data Migration
> The vendor will be responsible for identifying a migration plan and provide templates for migration at a minimum. Additionally, it is desired that the vendor also provide initial data mapping, validation and data cleanup support. The vendor should be clear in their response regarding any other services that are included in the quotation to support data migration.
>
> **Component #6** – Release Management, Deployment Planning, and Post-Production Support
> The vendor will work with CI to determine an appropriate release calendar and process to migrate functionality, including integration, into the production environment. The vendor will be responsible for migrating code from development instances into the full test environment for UAT. The vendor will provide instructions and oversite to CI staff to migrate code into the production environment. The vendor will also support the creation of users and related security profiles, configuration of system settings, etc.
>
> **Component #7** – Knowledge Repository, Technical Knowledge Transfer and Training

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

Component #8 – Project Management
The Implementation Partner will lead the project management of the implementation and will be required to provide the following under this engagement:

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

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

Component #9 – Technical Management
The Implementation Partner will be required to provide the following technical requirements:

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

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

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

Deliverables and Acceptance Criteria

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

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

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

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

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

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

Attachment 3: Functional and Technical Requirements

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

Please see link below:

RFP Requirements Link

Attachment 4: Cost Proposal Template

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

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

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

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

Total Estimated Cost/Amount Range Budget: USD$750k – USD$500k

Please see link below:

RFP Budget Template Link

Attachment 5: Global Processing and Data Security Addendum

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

Please see link below:

CI's Global Processing and Data Security Addendum Link

Attachment 6: Vendor Security Management Questionnaire
CI requires the implementation partner(s) and all software vendors to submit the attached Vendor Security Management Questionnaire along with copies of SOC2 report where applicable.

Please see link below:

[Vendor Security Management Questionnaire Link](#)

Attachment 7: Terms of Service for Development of Software Systems

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

Please see link below:

CI's Terms of Service for Development of Software Systems Link

Attachment 8: Clarifications made by CI

1. **Q: If the bid is open to an international technology consulting company headquartered in India?**
   A: There are no geographic restrictions for respondents.

2. **Q: Is there any domestic or international travel required for vendor team members for this project?**
   A: No travel is required for vendor teams. However, respondents may determine if travel is preferred and include it in the proposal request.

3. **Q: Why has Conservation International decided to make this investment now? What is driving this project?**
   A: The CI-GEF portfolio has grown significantly since accreditation in 2013; shortly after, CI was also accredited as a GCF Agency. The institution is seeking to make this investment to continue to effectively manage the portfolio and to ensure efficiencies in project and portfolio management.

4. **Q: Has Conservation International attempted an initiative like this in the past? If yes, please describe what was successful and not successful about those efforts**
   A: CI has attempted an initial design of a solution in Microsoft power apps. It was not pursued due to inefficient usability

5. **Q: What kinds of prep and/or readiness have the teams undergone in order to be ready for this type of engagement?**
   A: The team has participated in requirements gathering sessions with an internal business analyst to develop the RFP requirements. Additionally, the project team has participated in an initial RFI for solution platforms.

6. **Q: What are the goals of this engagement?**
   A: Below please find the most important goals for the engagement:
   - Centralized repository of projects by program to allow for visibility and reporting on program status and performance
   - Increase efficiency of Agency staff to manage projects within a program to increase automation and decrease manual repetitive tasks
   - Improved proposal/report submission and review process with from Executing Agencies
   - Improved efficiency of generation of GEF required reports such as the PIR
   - Automated reminders/alerts when projects/deliverables/measurements are outside of acceptable standards
   - Minimization of duplicate data entry between PPM system and ConservationGrants

- Automation of activities based upon templates.
- Secure document management and approval tracking

7. **Q: What challenges is this engagement looking to solve?**
   A: Below please find the most immediate challenges we are looking to solve:

   - Generating program level reports, on project status and project results
   - Providing a single place to view the status of a project, project phase, specific deliverables, etc.
   - Improve efficiency of submission and review of documents from the Executing Agencies
   - Eliminating duplicate entry into multiple systems such as ConservationGrants Raiser's Edge and Business World.
   - Minimize the level of effort and increase the efficiency of creating reports to Secretariate
   - Eliminate manual, repetitive tasks such as report reminders and creation of PIR
   - Identifying status of required deliverables and reports

8. **Q: How many vendors will be participating in the RFP?**
   A: The RFP is open to all vendors who are interested.

9. **Q: What expectations do you have in terms of Diversity Equity and Inclusion principles re: system design?**
   A: We do not have firm expectations in terms of DEI principles of system design but are interested in learning if they are considered by implementation partners when designing solutions.

10. **Q: Is a fixed bid required?**
    A: Please use the Budget template provided in the RFP. The submitted budget will be the basis of evaluation.

11. **Q: What is the budget range for this project?**
    A: There is no specified budget range for this project.
    [Updated: The budget range is $500k-$750k]

12. **Q: Have you already communicated with a Salesforce Account Executive about this project?**
    A: Our Salesforce Account Executive is aware of the RFP and the project.

13. **Q: Do we have your permission to communicate with your Salesforce Account Executive regarding this RFP?**

A: No, to ensure the equitable access of information to all bidders.

14. **Q: Please describe your decision-making process for this RFP.**
    A: The proposal will be scored based on the Evaluation Criteria, established in section 7 of the RFP.

15. **Q: Please share more about your timeline for selection, implementation, go-live, etc.**
    A: The timeline for selection is detailed in Section 8, Proposal Timeline of the RFP. We have no specific requirements for implementation timeline and will depend upon the level of effort required for the project and availability of both the implementation partner(s) and CI staff. Bidders should include anticipated project timelines in their responses.

16. **Q: Are there any hard deadlines for the project? If so, please elaborate.**
    A: There are no hard deadlines for the project implementation. Bidders should include anticipated project timelines in their responses. Bidders shall adhere to submission requirements of the RFP. Proposals must be received no later than November 1, 2021, at 11:59PM EDT (UTC-03:59). **[This deadline has been extended to December 15, 2021, 11:59PM EST (UTC-05:00.]** **[This deadline has been extended to January 31, 2021, 11:59PM EST (UTC-05:00.]**

17. **Q: Are there any systems you will lose access to or will be sunsetting that rely on this product?**
    A: No, there are no systems that are being retired as we transition to the planned PPM system.

18. **Q: Will you plan to conduct a pilot with a subset of agencies and/or programs or projects?**
    A: The initial implementation of the PPM solution covered under the RFP includes the GEF program (all requirements) and the GCF program (subset of requirements). We have not anticipated piloting to a smaller set of projects at this time but are open to recommendations from Implementation Partners in their proposal.

19. **Q: To what extent does Salesforce experience impact your decision on selecting a vendor?**
    A: As described in Section 7 of the RFP, Implementation Partner experience and qualifications will count for 25% of the overall proposal score.

20. **Q: Will there be an opportunity for a scoping call so we can ask detailed questions? Or will all the questions be submitted via email only?**
    A: Questions will be submitted via email only.

21. **Q: Are you willing to provide examples of workplans, reports, and logframes during the RFP process?**
A: All public reports/documents are available on our websites:
https://www.conservation.org/gef/projects and https://www.conservation.org/gcf/projects.

22. **Q: What level of communication should bidders expect during the RFP process (e.g. will we be able to discuss the project with CI staff)?**
A: The level of communication with CI staff will be limited. The Clarifications submitted to CI, was the best way of directly asking questions.
If your firm is selected as one of the finalists for **Stage 2: Live Demonstration** portion of the RFP, your firm will have two interviews consisting of:

   i. A 60-minute interview with a focus on system architecture, application, and data security.
   ii. A 120-minute system demonstration focused on how the solution meets the functional requirements.

23. **Q: How many internal, dedicated change management, communications and training resources will be provided for the implementation?**
A: CI will provide change management and communications resources as needed for the implementation. However, CI does not have dedicated team of change management professionals and as such the responsibility will be born by the CI GEF/GCF staff and will be a portion of their job responsibilities.

24. **Q: Does CI have the ability to extract any data required for the PPM from ConservationGrants and/or Sharepoint without vendor support?**
A: CI has the basic ability to extract data from ConservationGrants and Sharepoint without vendor support. Respondents should indicate what specific support is required in order to ensure CI is able to meet this requirement.

25. **Q: What type of admin support do you have in place today? What capacity and infrastructure is in place for ongoing maintenance and management?**
A: CI has a team responsible for the current maintenance of ConservationGrants. We will evaluate future staffing and support needs based upon the solution that is decided.

26. **Q: Do you have a change management plan/strategy in place today that will support this engagement? If not, should this be included in scope?**
A: We do not have change management plan or strategy in place for this engagement. Vendors should include this activity in their response if they believe it is important to the success of the project.

27. **Q: Do you have a data governance plan/structure in place today that will support this engagement? If not, should this be included in scope?**
A: We do not have a formal data governance plan/structure in place for this engagement. The CI GEF/GCF teams have clear roles and delineation of governance over data within their system, but there is no formal structure.

28. **Q: Has Conservation International participated in agile development projects before? If yes, which agile framework have you used in the past? Which one worked will and which one(s) do you not prefer?**
A: CI IT department has utilized agile development principles in executing their internal and external projects. We prefer agile methodologies that are sprint-based (as opposed to Kanban) where we can prioritize user stories and deliver incremental value during the project implementation. Additionally, we place a large focus on defining the sprint cycles, sprint stages, project team roles, and testing and acceptance methodology at the beginning of the engagement.

29. **Q: Who would be involved in this engagement from Conservation International? What are their responsibilities? Would the selected vendor be expected to own the agile management or participate as part of a large agile team?**
A: The selected vendor would be responsible for owning the agile project management responsibilities. We expect the vendor to define the specific needs from the CI side, but we anticipate the following potential participants from CI:

- CI Project Manager: Responsible for coordinating resources on the CI side and guiding CI staff through Agile development process
- Subject Matter Experts: Individuals from different user groups responsible for reviewing user stories, defining acceptance criteria, making design decisions and conducting user acceptance testing.
- Product Owner – Overall CI responsibility for defining priorities, determining scope and budget, and ensuring CI resource allocation
- ConservationGrants Administrators – Responsible for providing input on CG configuration and managing any changes to CG as a result of the PPM solution
- CI Sharepoint Administrator – Responsible for advising on Sharepoint configuration and providing technical expertise as required.
- CI IT Security and Data Privacy – Responsible for ensuring proper IT security and data security principles are followed.
- Contracts Administrator – Responsible for managing the contract(s) with the implementation partner and any third-party vendors
- Project Coordinator – Provides administration and change management support activities.

30. **Q: Will additional 3ʳᵈ party vendors be involved in this engagement? What is their expected involvement?**
    A: Implementation Partners are expected to coordinate with 3ʳᵈ party vendors as needed to participate in the implementation and should recommend the level of participation required in their project proposal.

31. **Q: Who will manage the solution once the engagement is complete?**
    A: At this time, no decisions have been made about the management of the solution after implementation. CI will be responsible for the overall management of the solution. However, we may consider additional support services by a vendor as needed.

32. **Q: Will internal users participate in UAT?**
    A: *Yes – Internal users will conduct User Acceptance Testing.*

33. **Q: Will CI be providing a product owner and a scrum master?**
    A: *CI will provide a product owner. The implementation partner will be expected to provide a scrum master.*

34. **Q: Will CI be providing developers to include in the development team?**
    A: CI will not be providing developers to include in the development team for this project. CI may provide support from ConservationGrants and SharePoint administrators in the areas that impact their respective tools.

35. **Q: Do you have an entity-relationship diagram for the current Salesforce instance that you can share?**
    A: We do not intend to share the ERD for the current Salesforce instance at this stage in the RFP process. We may consider sharing the ERD with respondents that are invited to Phase 2 of the selection process after completing a mutual NDA.

36. **Q: What finance tool is your current Salesforce instance integrated with?**
    A: Unit 4 Business World

37. **Q: Any plans to change how you are currently using Salesforce? If so, please describe.**
    A: ConservationGrants is an actively managed platform and therefore is in constant state of maintenance and improvements to meet the evolving needs of the users. We do not anticipate any major system enhancements in the next year that would impact the PPM system. However, we do anticipate the eventual migration from FoundationConnect to another grants management platform as Salesforce continues to develop the Grants Management product and finalize timelines for discontinuing support for FoundationConnect.

38. **Q: Should integration with the finance tool be included in scope for this project?**
A: The preference would be to leverage the existing financial integration through ConservationGrants. However, implementation partners should propose the best overall solution based upon their experience and knowledge of the products available.

39. **Q: Have you/are you considering Salesforce-based PM tools like Cloud Coach or Mission Control?**
A: We are open to all Salesforce-based applications.

40. **Q: Have you/are you considering Salesforce-based impact tools like AmpImpact or OAKs?**
A: We are open to all Salesforce-based applications.

41. **Q: Should the technical solution include optimization for mobile access (ie.e phone, tablet, etc)?**
A: We currently have no specific requirements for mobile access, but we would prefer that the platform should allow for the implementation in the future.

42. **Q: Are you currently using Salesforce Communities?**
A: ConservationGrants currently utilizes the FoundationConnect Grantee Portal based upon Salesforce Communities

43. **Q: Do you require Salesforce Shield?**
A: We are not currently utilizing Salesforce Shield. The implementation partner may recommend platforms based upon requirements.

44. **Q: Do you currently have Premier Success and if not, are you open to subscribing?**
A: We do not currently have Premier Success. Implementation partners may recommend applications and support packages that they deem beneficial to project success.

45. **Q: What is the email provider currently in use by CI-GEF/GCF agencies?**
A: CI uses Microsoft Office 365 for our mail services.

46. **Q: Do you currently use Slack and if not, are you open to using Slack? (Noting use of Teams)**
A: While we will not rule out the use of Slack, we have a very strong preference for leveraging our existing Microsoft Teams functionality. It would require a strong business case to use Slack instead of Teams.

47. **Q: Are you using the Nonprofit Success Pack?**
A: No, CI is not utilizing the Nonprofit Success Pack.

48. **Q: Are you currently using a document generation tool like Conga or Apsona Merge?**
A: Yes, currently a portion of ConservationGrants users utilize Conga Composer.

49. **Q: How well is FoundationConnect currently working for you? Is there a general level of satisfaction with FoundationConnect?**
A: CI has configured FoundationConnect to meet our current business needs. There is a general level of satisfaction with FoundationConnect.

50. **Q: What is the CI Financial System? Raiser's Edge?**
A: CI's financial system is Unit 4 Business World. Raiser's Edge is used for fundraising.

51. **Q: Does Conservation International have an existing Single Sign On (SSO) application in place for Salesforce and/or SharePoint? If so, which one?**
A: CI utilizes Microsoft Azure authentication, however, ConservationGrants is not currently SSO enabled.

52. **Q: Is Single Sign On expected?**
A: Integration with SSO is desired but not a requirement under this RFP.

53. **Q: Does Conservation International have a preference for one-org vs a multi-org approach?**
A: Conservation International knows that there are benefits and costs associated with going with either approach. We are looking to the implementation partner to make recommendations on an approach. We will consider license costs, maintenance level of effort, and user experience when reviewing the two options. Additionally, we will consider the future costs of migrating the solution to another org when CI eventually moves away from FoundationConnect.

54. **Q: Does Conservation International currently have more than one Salesforce instance?**
A: Currently, Conservation International has two Salesforce instances. ConservationGrants and a separate instance that manages program data.

55. **Q: Will development of training materials (job aids, Captivate simulation videos, PPTs, etc.) be created internally or by your partner?**
A: CI would prefer the development of training materials be done by the partner organization with inputs from CI-GEF/GCF

56. **Q: Regarding training, is it expected that the vendor will perform all end-user training for agencies or is the train-the-trainer model acceptable?**
A: We anticipate the vendor will perform all end-user training for CI GEF/GCF agencies. Train-the-trainer model is preferred for end-user training of agency staff.

57. **Q: Are remote training sessions acceptable?**
    A: Yes, remote training sessions are acceptable.

58. **Q: We understand that integration with SharePoint is in scope, is SharePoint currently set up to manage documents appropriately? Or is additional effort required to prepare for a successful integration?**
    A: While the current SharePoint solution is configured appropriately, we expect that the SharePoint setup may require modification with the integration with the PPM system and should be considered part of the scope. CI may be able to provide SharePoint support in this effort.

59. **Q: Approximately how many documents are in a SharePoint per project? (We understand there is a great variance)**
    A: The number of documents per project vary greatly based upon the stage of the size and stage of the project. We can anticipate 500 – 1000 documents depending upon number of revisions required of various deliverables.

60. **Q: Is the SharePoint sharing model well defined or will consulting be needed regarding the security matrix?**
    A: The SharePoint sharing model is well defined in its current state. We anticipate that the sharing model will require update as part of the implementation of the PPM to ensure proper sharing and minimizing the maintenance required.

61. **Q: How does Conservation International intend to use SharePoint as part of the PPM project? Is it only for document management or possibly using other features such as sites, etc.?**
    A: Conservation International intends to use SharePoint for document management for the PPM project, specifically to allow non-Salesforce users to access documentation. CI is open to additional features inside the SharePoint solution.

62. **Q: How much data are you currently managing in your existing systems that you would want to migrate to Salesforce as part of this project? Can you give us an order of magnitude?**
    A: The total number of projects by phase is provided in **Section 2, Project Overview, Size of Portfolio.** In general, we would require the migration of data that would be required for either Agency or Entity reporting.

63. **Q: Can you please describe the types of data that will be migrated?**
    A: We expect data the following data to be migrated for the GEF portfolio only:
    - Project Listing with key project attributes such as description, executing agency, stage, timeline, amounts
    - Grants linked to projects
    - Results Framework targets and latest measurements

- Active workplans and outstanding deliverables with incomplete tasks, due dates, responsible parties
- Project Budgets and Expenditures
- Risks Ratings
- Safeguard Plans
- Reporting Schedule and Report Approval Status
- Links to existing SharePoint directories

Final determination of migration scope will be made based upon system architecture and design.

64. **Q: How would you describe the cleanliness and accuracy of the data?**
A: The data is currently not in a system and therefore we cannot testify to the cleanliness and accuracy of the data.

65. **Q: Will the vendor be expected to perform all data cleanup or a subset?**
A: The vendor is expected to identify data cleanup activities and systematically cleanup records to the extent possible. We understand that the Agencies own the data and will be required to do some of the cleanup and to review all of the cleanup automated by the vendor.

66. **Q: Will CI be able to provide data tables with unique IDs?**
A: The data is currently not in a database. CI will be able to populate templates provided but without unique IDs.

67. **Q: What systems contain legacy data for import besides Word, Excel, and Salesforce/FoundationConnect? (Excluding Sharepoint)**
A: There are no additional systems from which data will be migrated.

68. **Q: How many users are/will be using the solution?**
A: *Please refer to Section 2, Project Details for user estimates.*

69. *Q:* **Please confirm, all requirements listed in Appendix 3 are included in phase 1 and should be represented in our proposal and cost estimate.**
A: All requirements for Phase 1 are included in Appendix 3 and need to be in proposals/cost estimates.

70. **Q: Will Secretariate members need access to the system? If so, what level of detail do they need?**
A: No. GEF and GCF Secretariat staff will not have access to the system.

71. **Q: Should the solution solve for expense tracking and if so, at what level(i.e. total expense per activity or individual expenses)?**

A: No, the solution should not include individual expense tracking. Only total expense at the component level and overall cost category.

72. **Q: To what extent should the solution accommodate prime/sub funding and budgeting?**
A: The Solution will not need to include prime/sub-funding and budgeting.

73. *Q:* **Is there a need to collect data at the beneficiary level and if so, will that data include personally identifiable information?**
A: No, there is no need to collect data on the beneficiary level.

74. **Q: For input/output/outcome/impact tracking, how many tiers of tracking are required (ie. Program, portfolio, project, activity)?**
A: We require tracking or reporting of results at the impact level, project level, and program level. Tracking is on activity, project and portfolio levels.

75. *Q:* **How often are measurements conducted for activities?**
A: Activity measurements are conducted by the Executing Agency and it depends on the individual project. CI-GEF requires quarterly and annual monitoring.

76. **Q: What functionality is expected for measurement tracking (e.g. actual change, percentage change, cumulative totals, increase, decrease, et)?**
A: The method of reporting measurements depends upon the indicator. We often utilize percentage change, actual change and cumulative totals.

77. **Q: What functionality is expected when measurements indicate a project is not on track (ie, is there an expectation of a flag or notifications?**
A: A system generated alert, which can include emails or another tool.

78. **Q: For mitigation plans, is tracking whether mitigation activities have been completed expected? Are there action notices required?**
A*:* Yes, activities would be created with expected timeline for completions. Yes, it is expected that notices are sent out if activities are not delivered on time.

79. **Q: For Amendments and Change requests, is a formal approval process expected or just the ability to not(e) that approved has been received?**
A: Yes, for amendments there is an expectation that the system will allow for the documentation of approvals by all required individuals. We do not have specific requirements if a formal Salesforce approval process or a combination of validation rules and automation could be used.

80. **Q: For deliverable approvals, is a formal approval process expected or the ability to note approval has been received?**
A: There is an expectation that the system will allow for the documentation of approvals by all required individuals. We do not have specific requirements if a formal Salesforce approval process or a combination of validation rules and automation could be used.

81. **Q: Given the requirement for a grantee portal, is there similar requirement for a portal for reviewers and/or Secretariate members?**
A: The GEF/GCF Secretariats have their own portals. The CI solution does not need to communicate with the GEF/GCF portals. Reviewers from the CI-GEF/GCF agencies will be using the CI solution.

82. **Q: Can you provide documented workflows for required alerts and automations or is this something that will need to be identified in discovery with your partner?**
A: Workflows will be identified during discovery. Alerts can include: deliverables overdue, due dates approaching, approvals, document ready for review etc.

83. **Q: Is offline data collection required? If so, have you considered tools like TaroWorks?**
A: We do not require offline data collection.

84. **Q: In terms of UI design, how important is control over branding and "look and feel"?**
A: The UI should be user-friendly so that the users can intuitively navigate through their appropriate tasks in the system. The "look and feel" is most important for the grantee portal, for which we would like the ability to make updates as necessary for branding and ease of use.

85. **Q: For project and donor approvals – is an online approval process required?**
A: The PPM system shall allow for the Agencies to record the Secretariat approval of project stages. The PPM system shall allow CI to identify approvals that are required for projects to move to the next phase, including notifications and reporting on approvals completed and outstanding, and enforce those approval requirements.

86. **Q: Approximately how many indicators are used per project?**
A: This is highly dependent on project design. We can expect a minimum of 30 indicators per project.

87. **Q: Can you please elaborate on the "snapshot" requirement? What values or fields are required?**
A: We need to see the project data at specific points in time in relation to the project cycle. For example, prior to PIF approval, PPG phase, implementation phase, and closeout. There are specific data components that are critical, including the results framework/logical framework.

88. **Q: Are tasks and deliverables connected to activities, project, programs or all of these?**
A: Yes, please look at the monitoring section or a project document for reference <u>here</u>.

89. **Q: What level of activity/task is required for Gantt tracking?**
A: Tracking needs to be done for each row of the Gantt chart.

90. **Q: What does ESFM mean in this context?**
A: Environment Social Management Framework-
https://www.conservation.org/docs/default-source/gcf/ci_gef_gcf-esmf-version-7.pdf?sfvrsn=a788de43_4

91. **Q: What is the FRA in this context?**
A: This is the Financial Risk Assessment. It is a questionnaire to assess the capacity of an organization to manage GEF and GCF funds.

92. **Q: Is there a list of strategic reports, metrics and other analytics that are intended to be used as part of the PPM solution?**
A: Strategic reports can be focused in the following areas:
- GEF/GCF Program Metrics – Total project performance against program metrics
- Portfolio level reports – Pipeline reports, Approved Projects by Stage, total fundraising achieved by fiscal year
- Program Performance Reports – such as Number/Percentage of Projects with Risks, Number/percentage of projects that are delayed or not performing against expectations
- Agency Management Reports – Examples of time elapsed between pre-implementation phases, time elapsed from submission of reports/proposals to approval
- GEF/GCF Agency Standard Reports, such as Project Implementation Reports.
  At project level - Total project spent vs. budgeted, and total co-financing materialized vs. committed. Costs by components, and cost categories as well as percentage used

93. **Q: Could you please explain the rationale of considering the idea of having two separate instances of Salesforce (one for Program Management and a one for Grant Management). Is there a level of technical debt in either of the environments which is prohibiting CI from housing both functions in a single org?**
A: ConservationGrants is built on grants management features contained in foundationConnect, which Salesforce.org had determined it will no longer enhance. While Salesforce.org has not provided an end-of-life date for foundationConnect, they are recommending that if organizations migrate from foundationConnect to Granst Management, they do so through a new Salesforce org. For this reason, Conservation International is requesting vendors to consider both a one org and two org architecture.

94. Q: Did anything change in the RFP from the original posting?

A: The following items were updated:

- A budget range was added
- The timeline was extended
- A vendor Q&A session was included.

95. Q: Do you have a preferred format for submissions?

A. Preferably submissions will be e-mailed as attachments or in a zipfile.