Request for Information

Date: December 23, 2020

Request for Information: CI GEF/GCF Project Management System

Dear Sir or Madam,

Conservation International Foundation (hereinafter referred to as “Conservation International” or “CI”), is issuing a Request for Information (RFI) for Design and Development of CI GEF/GCF Project Management System.

Conservation International serves as an Accredited Entity/ Project Agency for the Green Climate Fund (GCF) and the Global Environment Facility (GEF). In this capacity, CI is responsible for designing large scale projects that benefit the environment. This entails working through a multi-stage project cycle to design projects, channel funding to executing agencies, monitor of funding and technical deliverables and close out projects.

Currently the CI GEF and GCF programs oversee 38+ projects totaling $100+ million with many more in development. Conservation International seeks to design and develop a system to help manage the GCF and GEF projects from project concept to final monitoring. System design and implementation should focus on providing effective and efficient processing of program information between applicants/grantees, CI GEF/GCF staff, and related CI systems such as CI’s financial system (Business World), grant management system (foundationConnect/Salesforce), and fundraising systems (Sharepoint and Raiser’s Edge). The CI GEF/GCF system shall leverage functionality in existing tools where possible while streamlining processes and eliminating duplicate data entry.

The RFI requests information from vendors for a system to manage the CI GEF/GCF portfolio and projects as described in Section 2 of this RFI. CI is looking for software platform(s) as well as implementation services to design, develop, and implement the CI GEF/GCF Project Management System. The purpose of this RFI is to gather information on the software platform options and vendor profiles for implementation. The information gathered as a result of this RFI will be used for budgeting purposes and to support the development of the scope of work for a future RFP.

Interested parties are encouraged to join an informational webinar on January 15, 2021 from 2:00 – 3:00 ET to ask any questions related to the RFI request. Please see link to webinar: Webinar

All interested vendors are expected to exercise the highest standards of conduct in preparing and submitting responses to this RFI, and if selected under any future RFP, eventually carrying out the specified work in accordance with CI’s Code of Ethics.

COVID 19 Guidelines
Interested parties shall adhere to all applicable international, national or local regulations and advisories governing travel, including safety, health and security measures in effect throughout the Period of Performance.
It is expected that CI and the interested parties will take into consideration and plan around the international, national or local regulations and advisories governing travel, including safety, health and security measures in effect in the countries that the consultant is expected to visit. Virtual consultations are possible and expected where in-person field work is not possible.
Request for Information

RFI: CI GEF/GCF Project Management System

For the provision of

CI GEF/GCF Project Management System

Entity:

Conservation International

Funded under:

CI-GEF/GCF Agencies
Instructions and General Guidance

1.1 Introduction

CI is soliciting information from vendors to submit responses to carry out the services described below.

OBJECTIVES:
CI seeks information on software solutions to manage CI GEF/GCF projects and portfolio from initial concept to final evaluation as described in Section 2, Scope of Work. Additionally, we seek information on implementation partners to gather detailed requirements, develop/configure the solution and support product launch activities.

1.2 Response Deadline

Interested parties shall submit their responses electronically at the following email address, CIGEF@conservation.org

We request responses be submitted by January 31, 2021 5:00pm (EST).

1.3 Instruction for Interested Parties

All responses must be submitted in one volume, consisting of:

- Technical Solution Recommendation
- Implementation Partner Capabilities and Experience
This RFI 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 responses.

1. Technical Solution Recommendation

The Technical Solution Recommendation should describe in detail how the Respondent intends to meet the requirements described in Section 2, Scope of Work (SOW), including
- Software platforms recommended to meet business requirements
- Description of what features, configuration, and customization (including custom development) is anticipated
- Relationship between proposed software and existing CI business applications, including any integration points

2. Implementation Partner Capabilities and Experience

This section shall describe the technical implementation of the solution and the experience and capabilities of the implementing organization. Please describe how your organization either implements the solution directly or works with implementation partners to design and develop the technical solution. Please include examples of similar engagements with non-profit clients, including a high level description of the solution, the duration of the project, and the team size.

1.4. Chronological List of Events

The following calendar summarizes important dates in the process. Respondents must strictly follow these deadlines.

<table>
<thead>
<tr>
<th>Event</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>RFI published</td>
<td>12/23/2020</td>
</tr>
<tr>
<td>Q &amp; A Webinar</td>
<td>1/15/2021 12:00 – 3:00 PM ET</td>
</tr>
<tr>
<td>Link to Webinar</td>
<td></td>
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<tr>
<td>Requested response date</td>
<td>1/31/2021 5:00PM ET</td>
</tr>
<tr>
<td>Firms Invited for Demonstration Stage</td>
<td>February 2021</td>
</tr>
</tbody>
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Section 2. Scope of Work and Requirements

2.1. Background:

Conservation International serves as an Accredited Entity for the Green Climate Fund (GCF) and a Project Agency of the Global Environment Facility (GEF). In this capacity, CI is responsible for designing large scale projects that benefit the environment. This entails working through a
multi-stage project cycle to design projects, channel funding to executing agencies, monitor of funding and technical deliverables and close out projects.

Currently the CI GEF and GCF agencies oversee over 38+ projects totaling $100+ million with many more in development. Conservation International seeks to develop a system to help manage the GCF and GEF projects during all project phases; concept development, implementation, monitoring, evaluation and close-out. Currently, the agencies use a combination of solutions to meet the project management needs: word and excel templates to manage the reporting as well as Sharepoint as the document repository. In preparation for an ultimate solution, CI has developed an interim solution based upon Microsoft PowerApps that can be used as a prototype for an ultimate system.

The system should include functionality to support the functions of both the executing agencies (grant seekers) and the CI GEF and GCF program staff (oversight). While processes between the two programs are similar, they are not identical. As such the system shall be designed to meet common requirements while providing the ability to further extend the system for each of the program’s needs. Particular focus should be paid to integrating with existing systems including:

- Microsoft Office 365/Teams – Collaboration and Productivity suite
- ConservationGrants – External Grants Management system based upon foundationConnect and Salesforce
- Unit4 Business World – Financial System of Record
- Blackbaud Raiser’s Edge – Incoming grants and fundraising.

2.2 Outcomes:

CI GCF/GEF team seeks a platform to manage the lifecycle of individual projects from concept through implementation as well as report and manage on the portfolio of their program as a whole. The system will allow:

- Applicants to submit project applications both at the project concept and more detailed project development stages
- CI GEF/GCF team to evaluate and process project applications for funding and monitor funded projects through implementation
- Grantees to report on project implementation activities as well as impact and outcomes resulting from project activities
- CI GEF/GCF teams to enter evaluation information during project implementation and generate period reports to CI GEF/GCF based upon standard templates
- CI GEF/GCF management to review the entire portfolio of projects against key indicators and metrics of success
- CI IT staff to customize the application to CI GEF needs thorough configuration rather than code
- CI IT Security team to effectively manage access to the application and the data
- Integration with other systems and functions to allow for streamlined activities.

2.3 Business Processes to Be Covered:

- Submission and Development of Project Concept
- Generation of Project Identification Form for submission to GEF/GCF
• Development and award of Project Preparation Grant (PPG) under the GEF or Project Preparation Facility (PPF) under the GCF.
• PPG and PPF Grantee Reporting, including progress on deliverables and activities
• Development of GEF/GCF Project Document, including all Annexes and submission to GEF/GCF Agencies for Approval
• Development and award of Project Implementation Grants.
• Development of Annual Project Implementation Work Plans and Budget
• Submission and Approval of Technical Progress Reports
• Submission and Approval of Financial Reports
• Submission and Approval of Annual Reports
• Procurement, Execution and Recording of Mid Term Review
• Recording Project Evaluation and Generating Project Implementation Reports to Donors
• Procurement, Execution and Recording of Final Evaluation
• Forecast and Report Project-Related Revenue to Fundraising
• Managing Projects in Financial System (Business World)
• Cash Management with Donor
• Submit Financial Reports to Donors

2.4 Functional Areas and High-Level Requirements

Portfolio Management:
1. Track the details of all projects within the portfolio
2. Track workplan milestones related to individual project development
3. Generate portfolio level reports on key project indicators
4. Provide dashboard capabilities for the overall status of the portfolio, size of both funding projects and those in the pipeline.
5. Provide drill down capabilities to access project specific information

Project Management:
1. High Level Project Tracking
   • Capture data related to the content of the project
   • Capture financial data related to the project
   • Capture information on the internal and external people managing the project
   • Capture relevant project data for reporting to the donor
   • Capture overall information related to the phase/status of the project
   • Route projects internally for approval
   • Capture approval history of the project

2. Deliverable and Task Management
   • Track projects through inception, preparation, implementation and close out
   • Generate and manage work plans by project phase
   • Generate workplans based upon standardized templates by phase
   • Provide ability for applicants/project implementors to report against workplan tasks
   • Assign tasks and deliverables to both CI GEF/GCF Agency Staff and project implementors
   • Track status planned start and end dates as well as actual start and end dates.
   • Generate workplan status reports
3. Document Management
   - Provide a portal for the submission of documents/project artifacts
   - Track versions of the documents
   - Providing tracking of approvals of documents by key CI GEF/GCF Agency staff
   - Link documents to Projects, Phases and Deliverables

4. Communication
   - Generate emails from templates
   - Allow creation of ad hoc emails as necessary
   - Associate email communication to individual projects and documents and other system records.
   - Automatically generate reminder and overdue emails based upon deliverables and activities to grantees and to CI-staff

5. Reporting and Dashboards
   - Ability to create ad-hoc reports
   - Ability to generate reports based upon templates in Word or Excel with mapping to fields in Project Management Database
   - Ability to create dashboards

Results Framework Generation and Monitoring:
   - Capture the overall objective of the project
   - Track Components, Outcomes and Outputs of the Project
   - Track Activities that relate to outputs
   - Capture Safeguards triggered by the Project
   - Capture Activities that relate to safeguard management
   - Capture Indicators that will be used to measure progress toward Objectives, Outcomes and Outputs, and Safeguards
   - Capture targets and measurements for all indicators
   - Capture Project Risks
   - Generate report of the Project Results Framework based upon standard template
   - Provide implementors the ability to periodically report progress against results framework on a recurring basis including:
     - Measurements for indicators
     - Narrative Summaries of progress for Objective, Components, Outcomes, Outputs
     - Rating and Description of Project Risks
     - Narrative Summaries of progress on Project Safeguards
   - Provide ability for CI GEF/GCF staff to provide evaluation of status of project Objectives, Components, Outcomes, Outputs, Risks, and Safeguards
   - Generate annual project implementation reports based upon the project reporting and evaluation of CI GEF/GCF staff

Integration:
• Integration with Conservation Grants for Grants Management
• Integration with Business World for Financial Information
• Integration with Raiser’s Edge for Fundraising Information

2.5 High Level Technical Requirements
1. Software is built on a platform for which multiple vendors provide maintenance and support in the marketplace
2. Provides support for multiple languages, particularly in the interface for the applicants and grantees
3. Tracks history of changes to fields for audit tracking
4. Flexible and intuitive User Interface
5. Ability to customize views based upon record and/or role
6. Ability to manage security based upon custom roles
7. Ability to manage security to records/fields based upon configured rules
8. Supports Multi-factor Authentication
9. Tracks history of attempted and successful logins
10. Ability to encrypt certain fields and display based upon role level access
11. Provides secure APIs for integration to common applications
12. Ability to create and manage multiple sandboxes/staging environments and provide a mechanism to migrate changes between environments

2.6 Legal Terms

This RFI 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 responses.

This RFI is not a request for proposal; therefore, CI is not accepting proposals at this time. CI may issue a request for proposal in the future based on or related to the content and responses to this RFI; however there is no guarantee that a request for proposal will be issued as a result of this RFI. Responding to this RFI does not provide a competitive advantage to vendors if CI chooses to issue a request for proposal regarding the subject matter of this RFI.

Submission of a response to this RFI constitutes acknowledgement that the vendor has read and agrees to be bound by these Legal Terms.