REQUEST FOR PROPOSALS

Online Partnership Plan Tool

SUMMARY OF PROCUREMENT

The NDC Partnership Support Unit is searching for a vendor to provide technical assistance for the hosting, maintenance and continued development of the Online Partnership Plan Tool of the NDC Partnership over the next two years. Proposals, along with all requirements, should be submitted by November 26, 2020. The contract will be set as an open contract, where individual work orders will be issued before work begins. Compensation will be based upon the work negotiated in each individual work order, which will detail separate scopes of work, deliverables and budgets. There will be a fixed price work order for monthly administration of the hosting environment and maintenance (including server and security updates, network services, technical support services, performance improvement, bug fixing among other activities specified below in this Request for Proposals) as well as ad-hoc cost reimbursement work orders for the development of new functionalities.

About the World Resources Institute

Founded in 1982, the World Resources Institute (WRI) is a global environmental think tank that goes beyond research to put ideas into action, by working with governments, companies, and civil society to build solutions to urgent environmental challenges. WRI's transformative ideas protect the earth and promote development because sustainability is essential to meeting human needs and fulfilling human aspirations in the future.

About the NDC Partnership

The NDC Partnership is a global coalition of countries and institutions collaborating to drive transformational climate action through sustainable development. Through our Partnership, members leverage their resources and expertise to provide countries with the tools they need to implement their NDCs and combat climate change to build a better future. The NDC Partnership Support Unit is jointly hosted by the World Resources Institute (WRI) and the UN Climate Change Secretariat. The NDC Partnership has members in all regions of the world, with staff in Washington DC and Bonn, Germany (for this project, the vendor would be contracted through WRI and will engage mostly with the Bonn office).

The NDC Partnership Country Engagement process provides a framework through which priority needs of member countries are matched to the coordinated support of the Partnership's members and beyond. Throughout the process, the government of the country, with Partnership support, engages all relevant stakeholders to collaborate on NDC implementation. The Partnership Focal Points, nominated from the member country's government, lead the process of assessing needs and identifying opportunities for achieving NDC targets.

The Country Engagement process is an adaptable five-step process to establish, operationalize, and track Partnership activities at the country level. The stages include: 1) Scoping Mission and Request for Support; 2) Rapid Situational Assessment (RSA); 3) Design of the Partnership Plan; 4) Partnership Plan Implementation; and 5) Results Assessment and Learning. Partnership Plans are, thus, a tool to:

- Organize and plan country NDC priority activities and the support activities of Partnership members and in-country stakeholders in a results-based framework;

- Map existing and planned projects that contribute to the country's NDC goals;
- Monitor and track progress;
- Promote transparency and coordination of different stakeholders;
- Support identification and resource mobilization for country needs.

Although the plan can be used to mobilize resources, its main function is to ease planning and coordination, and track the progress of NDC implementation. Any gaps identified and not addressed in the Plan are recorded as items to be addressed in future iterations, as the country's NDC needs grow over time. Revisits to the Plan are also opportunities to reflect changes in government, and evolving government needs over time. More details on the Partnership Plan, including the existing Excel template, can be found in the NDC Partnership's Country Engagement Tool at http://cetool.ndcpartnership.org/lessons/stage-3-design-of-the-partnership-plan/.

Using the excel template as a guide, the NDC Partnership has developed an online tool to support stages 3, 4 and 5 of the Country Engagement process. The development started in 2019 and the tool is being rolled out to users during Fall 2020. The NDC Partnership is now seeking a vendor to administer the hosting environment, maintain and further develop the Online Partnership Plan Tool. The NDC Partnership is currently working with an existing vendor for the buildout of the tool, but is inviting all vendors (including the existing vendor) to bid on this RfP, for the long-term management of the online tool, to ensure the best value for money.

The tool is password protected. Limited access will be provided to vendors that express interest. However, as outlined in the timeline section of this Request for Proposals, there will be an open session for web developers to see a live demonstration of the tool and ask questions on November 13th 2020.

CHARACTERISTICS OF THE ONLINE PARTNERSHIP PLAN TOOL

Data input and tracking

- The online tool takes the form of a standard, but customizable Partnership Plan template. As each country sets up their Partnership Plan, they have the flexibility to include, remove, and edit the template. The administrator also has the option to add new columns. While the template is customizable, there are some fundamental components that cannot be changed (i.e. all Partnership Plans will require Objectives/outcomes, Outputs and performance indicators) and standardized columns (i.e. systems settings such as sector, focus area, type of support, etc.) that serve to generate reports and high-level analysis.
- The online tool serves as the central version of each country's Partnership Plan. However, users have the ability to work on the Partnership Plan offline. This is possible through the use of a CouchDB Add-On.
- The tool allows for easy updating, monitoring, and tracking of any changes made. Recent changes are marked in different colors and need to be approved by facilitators or administrators.

Reporting

- The online tool provides user-friendly visualizations for the content in the Partnership Plan. This includes the ability to generate reports looking at particular aspects of the Partnership Plan (e.g. a detailed report based on counts or budget allocations per different system settings).
- The online tool allows for customizable downloads of the plan, with the option to select specific fields/contents.
- The online tool consolidates information automatically, in the form of graphs and diagrams and conducts automatic calculations (e.g. calculation of total budget, budget breakdown by sector or assessment of progress made aggregating progress across sub-activities).

- The online tool tracks progress as it occurs across the Partnership Plan (e.g. ability to track when funding changes from pledged to implemented or when new partners respond).

User management

- There are different categories of users with varying editing and publishing permission rights. The administrator can create accounts for partners and set editing permissions, e.g. country contributors, country administrators, staff and system administrators. The tool is not public and will have around 400 users.
- All users can visualize data in reports once they are published and made available. However, editing of data changes for different user types. Contributors have only commenting and suggesting rights for Partnership Plans, while country administrators have full editing, uploading and managing rights for the Plans they are allocated to. Staff members have all those rights for all Plans. System administrators additionally can also change system setting used for reports and can manage the list of partners catalogued in the system.

Integration with other systems

- The content from the online tool is easily fed into the NDC Partnership's Knowledge Management System (hosted in Knack), where the Support Unit currently tracks global trends across Partnership Plans. The integration happens through downloading a customized report from the online Partnership Plan and uploading it into Knack (download as a csv file).

Technical specifications:

- Coding languages:

    o Backend: NodeJS
    o Web Application: ReactJS, Javascript

- System architecture information:

    o PostgreSQL: Used for User & Master data management
    o Remote CouchDB: Used for plan data / report management
    o NodeJS: REST API interface for connecting and using data stored in databases and performing related operations
    o Local CouchDB: Applicable to some users where plan data can be synced to local CouchDB from remote CouchDB. This enables admins to work on plan even in offline mode.
    o ReactJS: Web application for managing plans, users, masters & pulling reports.

- Frameworks applied: Laravel, NodeJS, ReactJS, Javascript
- Other software information:

    o Coding IDE: Visual Code
    o CouchDB: Fauxton (bundled with CouchDB)
    o PostgreSQL: pgAdmin
    o Web App to local couch connector: WBD Couch Connector Plugin for Google Chrome & Mozilla Firefox browsers

- Server/cloud information and server/cloud environment

    o AWS EC2
    o ElasticIP
    o IAM Management
    o AWS RDS
    o S3 Bucket
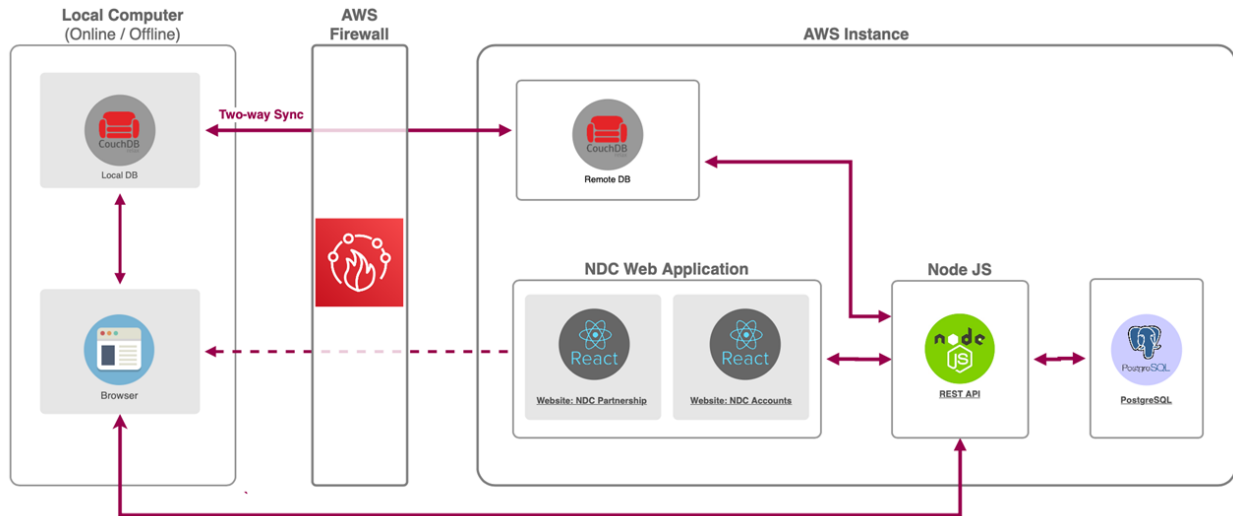
SCOPE OF WORK AND ACTIVITIES

The overarching scope of work is for the ongoing administration of the hosting environment, maintenance and development of the Online Partnership Plan Tool over the next two years. The scope of work is divided into two different sets of activities.

Scope of Work I: Basic hosting, maintenance and support (full contract duration)

The maintenance and support include the following work:

- Administration of the hosting environment of the tool (DevOps)
  - o Amazon AWS Hosting
  - o Backup Procedures
  - o Firewall
  - o Disaster / Recovery Protocols
- Network Services
  - o Review log files, tuning, Uptime Alerts (auto-send)
  - o Monitoring
- Server environment and security updates. This includes security and function updates to all parts of the platform. This also includes the possible need for add-ons and function modules depending on the adaptation required. Examples are: CouchDB and PostgreSQL.
- Security services
  - o AWS Firewall Security Group
  - o SSL Certificate
  - o Database Replication
  - o IAM user for S3 access
  - o Security patch updates in Apache
  - o Security patch updates in PostgreSQL
- Data Portal platform updates
- Performance improvements (e.g., scalability, load times, low bandwidth performance, analysis completion)
- Technical Services:
  - o In application Support form (responding and taking action + reporting on task status)

- o Continued optimization of the tool's software
- o Ongoing software development support (i.e. incorporating feedback from users and fixing bugs)
- Writing and publishing documentation
- Managing and administering cloud servers, upgrading software packages, and software licenses
- Ensuring security standards are met
- Project Management:
  - o Ad-hoc Support meetings (CouchDB, usability, review data anomalies, support questions)
  - o Help desk reporting
  - o Update In application help instructions / tutorials / guides

Work under this Scope of Work will be compensated on a fixed price basis per month. It is estimated that approximately 30 hours of support is needed per month for this Scope of Work.

Scope of Work II: Ongoing development

The NDC Partnership wants to deploy a flexible process to allow for on-demand development for new functionalities identified through stakeholder input and prioritized by the NDC Partnership team i.e. specific scopes of work will be determined on a periodic basis via work orders, which will detail expected deliverables and budget. Requested work may be on any part of the tool. The process entails two steps:

1. Upon request, the vendor will draft and submit for approval to the NDC Partnership Support Unit technical proposals covering improvements or new functionalities that respond to user feedback. These should be in the form of work orders (attached) and should include a detailed list of deliverables, a timeline, a workplan, the budget breakdown and technical specifications such as specifics on the software. Approval by the NDC Partnership Support Unit is needed of any work order before work is to begin on any project under Scope of Work II.

2. Upon approval of the work order by the NDC Partnership Support Unit, the vendor will develop and implement the new feature or system improvement, including giving opportunities for comments and feedback from the NDC Partnership team and core users.

Outputs and deliverables under Scope of Work II may include:

- User experience interface and design:
  - o General design enhancements and UI improvements (e.g., iconography, information architecture) in accordance with existing designs
  - o Maintenance of the NDC Partnership style guide
- Frontend and backend development, including quality assurance:
  - o Scoping and building new pages, tools, and features; enhancing existing pages, tools, and features
  - o Improving reporting function, including the flexibility to generate and visualize Plan information in new formats that can be customized by users
  - o Improving the flexibility and customization of system functions
  - o Scoping and implementing the further integration of the Online Partnership Plan tool with other tools and databases

In all new developments, NDC Partnership expects following deliveries together with the improvement or development of the new functionalities:

- Documentation
- Technical Scoping
- Prototype/Mockup design

- Interface development
- Quality Assurance

Compensation under Scope of Work II will be based upon the work negotiated in each individual work order. Payment will be made on a cost reimbursement basis upon submission to and approval by the NDC Partnership team of invoices and work order deliverables.

BUDGET AND COMPENSATION

The maximum budget for Scope of Work I is $50,000 per year. The budget for Scope of Work II will be determined on a need basis but will not exceed $75,000 per year. The price offered in the proposal will be an important element of the evaluation criteria.

For the budget proposal for Scope of Work I, the proposal should include the estimated number of hours for completing the activities listed in the previous section as well as the proposed cost for completing those services i.e. a fixed rate per month.

For the budget proposal for Scope of Work II, the bidder should only provide information on hourly rates per type of specialist as this will be the prices for the cost reimbursement of each approved work order under this Scope of Work.

The budget proposal should be handed in by filling the following template table:

Budget Proposal		
Scope of Work I	*Estimated number of hours*	*Fixed price per month*
Basic Hosting, Maintenance and Support		
Scope of Work II		*Daily rate per specialist type*
Specialist Type 1		
Specialist Type 2		
Specialist Type 3		
Specialist Type 4		
…		

TIMELINE

The vendor procurement for this RFP will follow the below timeline (all dates are considered by 11:59 pm EST):

RFP issued	**October 29 2020**
Expressions of interest and RFP questions	**November 12 2020**
Open session for questions and for viewing the tool	**November 13 2020**
Deadline for submission of proposals	**November 26 2020**
Selection of vendor and signing of contract	**December 11 2020**
Start of contract	**February 1 2021**
All activities finalized	**January 31 2023**

All questions to the RFP should be sent directly to: procurement@ndcpartnership.org using the subject line OnlinePP_RFP_ORGANIZATION NAME. Answers to RFP questions will be shared with all parties who have asked questions or otherwise expressed interest in submitting a proposal.

PROPOSAL GUIDELINES

Requirements

The selected vendor must demonstrate capacity in similar work, particularly:

- Development and management of online tools, databases, and visualization tools
- Development of user-friendly tools
- Development of multi-stakeholder tools
- Experience working with users in developing countries
- Experience with AWS, CouchDB, NodeJS, ReactJS and Javascript
- Experience with development and climate change topics as an asset

Content

Prospective vendors should submit the below:

- A statement of interest describing the proposed team and how it meets the above requirements;
- CVs of team members clearly stating project manager and development team;
- Examples of and references of similar previous work as described in the requirements;
- For Scope of Work I: A brief (2-3 page) describing how the vendor would take on and continue the seamless management of this tool;
- For Scope of Work II: A non-binding draft proposal explaining how the vendor would implement the development of further functionalities in the online tool. The proposal should include the presentation of a proposed solution and a budget calculation detailing hourly rates for the different specialists and the total cost for each functionality. The vendor can choose from the following list and should present a proposal for at least two of the following new functionalities:
  - Adapting the tool to support different languages (e.g. French, Spanish) to be offered in a systematic form so that changes are automatically reflected across the different system functionalities i.e. users can choose their view language;
  - Creating the option for supporting various currencies in the budgeting tool with automatic conversion for reports;
  - Improvements in the overall user experience and reporting function;
  - Ability to filter information in Plans to allow for customized navigation.
- An outline of the proposed methodology and workplan (including any relevant ticketing system);
- A description of how the work and/or vendor is environmentally sustainable;
- A proposed budget with a breakdown of costs with sufficient information to assess reasonableness and compliance with our funder requirements, following the table provided above:
  - For Scope of Work I: a fixed price for monthly hosting and maintenance
  - For Scope of Work II: hourly rates per type of specialist

EVALUATION AND SELECTION

Evaluation Criteria

The following elements will be the primary considerations in evaluating all proposals submitted in response to this RFP.

- Completeness of all required elements;
- The extent to which the vendor's proposal fulfills WRI's stated requirements as set out in the RFP;
- Experience with similar projects;
- Quality of the proposed solutions presented under both Scopes of Work I and II;
- Vendor's technical expertise relevant to the stated requirements of the RFP;
- Vendor's ability to complete the activities within the set timelines;
- Overall cost of the vendor's proposal and best value for money;

- Sustainability – WRI values sustainability and all other factors being equal, will favor a proposal to more sustainably perform the work.

Selection Process

No proposal development costs shall be charged to WRI; all related expenses are to be borne by the bidders. WRI may award to the bidder offering best value without discussions. However, WRI reserves the right to seek bidder clarifications and to negotiate with those bidders deemed to be within a competitive range. WRI may, at its discretion and without explanation to the prospective vendors, choose to discontinue this RFP without obligation to such prospective vendors, or make multiple awards under this RFP.

PROPOSAL SUBMISSION

All proposals must be submitted by **November 26 2020, 17:00 GMT-5** to procurement@ndcpartnership.org. Please use the following format for the email subject line: OnlinePPTool_RFP_ORGANIZATION NAME. All proposals must be submitted in electronic format.

ATTACHMENT: EXAMPLE OF WORK ORDER

Work Order

Vendor Name:				
Contract No:				
Work Order No:				
Work Order Period of Performance:	Start Date:		End Date:	
Work Order Cost Structure:	☐ Cost Reimbursement		☐ Fixed Price	
Work Order Amount (Not to Exceed):				

This Work Order ("WO") is entered into on upon the date of signature by both parties (the "Effective Date"), by and between the World Resources Institute ("WRI") and "Vendor Name" (the "Consultant") (collectively "the Parties") and pursuant to and governed by the Open Contract between the Parties, dated 7 February 2019 (the "Agreement"), and is hereby made an exhibit thereof (Exhibit A).

General Terms

This WO is valid for the period of performance listed above. In the event this WO exceeds the term of the Agreement, the terms and conditions of the Agreement shall remain in effect for the benefit of this WO only.

1. **Background and Goals**

2. **Scope and Deliverables**

3. **Cost and Payments**

4. **Warranty**

Consultant agrees to a warranty period of three month after delivery of the final milestone. During this warranty period, Consultant will address any hidden bugs or errors free of charge.

5. **Invoicing**

All invoices must be addressed to the World Resources Institute and contain the following information: contractor or vendor name and logo (if applicable); address and contact information; description of the product or services provided; currency and total amount; signature and date; and contractor or vendor bank information, including the following:

Beneficiary Name
Beneficiary Bank Name
Beneficiary Bank Address
Bank Account number/ IBAN (for Europe)
SWIFT Code (for International payment)
ABA number (for US domestic payment)
IFCS number (for India)
Clave number (for Mexico)
Intermediary bank info, if applicable

For WRI: *For Vendor Name:*

Signature: Signature:

Name: Name:

Title: Title:

Date: Date:

cc: Contract Files