Updated – Request for Proposals (RfP) IUCN website development

IUCN, Global Communications Unit

Issue Date: 6 April 2021

Closing Date and Time: 9 May 2021

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Note:Changes from the original RfP are in highlight.

PART 1 – INSTRUCTIONS TO PROPOSERS AND PROPOSAL CONDITIONS

1.1. About IUCN

IUCN is a membership Union uniquely composed of both government and civil society organisations. It provides public, private and non-governmental organisations with the knowledge and tools that enable human progress, economic development and nature conservation to take place together.

Created in 1948, IUCN is now the world's largest and most diverse environmental network, harnessing the knowledge, resources and reach of more than 1,400 Member organisations and some 15,000 experts. It is a leading provider of conservation data, assessments and analysis. Its broad membership enables IUCN to fill the role of incubator and trusted repository of best practices, tools and international standards.

IUCN provides a neutral space in which diverse stakeholders including governments, NGOs, scientists, businesses, local communities, indigenous peoples organisations and others can work together to forge and implement solutions to environmental challenges and achieve sustainable development.

Working with many partners and supporters, IUCN implements a large and diverse portfolio of conservation projects worldwide. Combining the latest science with the traditional knowledge of local communities, these projects work to reverse habitat loss, restore ecosystems and improve people's well-being. Headquartered in Switzerland, IUCN Secretariat comprises around 950 staff in more than 50 countries.

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

1.2. Summary of the Requirement

IUCN invites you to submit a Proposal to develop a new website for IUCN and offer ongoing maintenance and service. The detailed description of the Requirement can be found in *Part 2 of this RfP*.

1.3. The procurement process

The following key dates apply to this RfP:

RfP Issue Date	6 April 2021
Submission of portfolio and pre-selection questions	16 April 2021, 23:59 CET (see section 4.1 for details)
Maximum of top ten candidates notified and invited to submit proposals	No later than 21 April 2021
Submission of proposal	9 May 2021, 17:00 CET (see section 4.2 for details)
Estimated Contract Award Date	18 June 2021

1.4. Conditions

IUCN is not bound in any way to enter into any contractual or other arrangement with any Proposer as a result of issuing this RfP. IUCN is under no obligation to accept the lowest priced Proposal or any Proposal. IUCN reserves the right to terminate the procurement process at any time prior to contract award. By participating in this RfP, Proposers accept the conditions set out in this RfP.

Proposers must sign the "Proposer's Declaration" and include it in their Proposal.

1.5. Queries and questions during the RfP period

Proposers are to direct any queries and questions regarding the RfP to the above IUCN Contact. No other IUCN personnel are to be contacted in relation to this RfP.

Proposers may submit their queries **no later than 23 April 2021, 23:59 CET**.

As far as possible, IUCN will issue the responses to any questions, suitably anonymised, to **all invited candidates by 27 April 2021**. If you consider the content of your question confidential, you must state this at the time the question is posed.

1.6. Amendments to RfP documents

IUCN may amend the RfP documents by issuing notices to that effect to all Proposers and may extend the RfP closing date and time if deemed appropriate.

1.7. Proposal lodgement methods and requirements

Proposers must **submit their Portfolio and replies to the pre-selection questions to IUCN no later than 23:59 CET on 16 April 2021** by email to: mark.gnadt@iucn.org. The subject heading of the email shall be [RfP interest – IUCN website DEV – [Proposer Name]].

If invited to do so, Proposers must **submit their full Proposal to IUCN no later than 17:00 CET on 9 May 2021** by email to: mark.gnadt@iucn.org. The subject heading of the email shall be [RfP – IUCN website DEV – [Proposer Name]].

Electronic copies are to be submitted in PDF and native (e.g. MS Word) format. Proposers may submit multiple emails (suitably annotated – e.g. Email 1 of 3) if attached files are deemed too large to suit a single email transmission.

IMPORTANT: files of the full Proposal must be password-protected so that they cannot be opened and read before the submission deadline. Please use the same password for all submitted documents. At minima send 1 technical and 1 financial document. **Under the deadline has passed and no later than 10:00 CET on 10 May 2021, please**

send the relevant password to the same email address as used for submitting your Proposal. This will ensure a secure bid submission and opening process.

<u>IMPORTANT</u>: Please **<u>DO NOT</u>** email the password before the deadline for Proposal submission.

Proposals must be prepared in English and in the format stated in *Part 4 of this RfP*.

1.8. Late and Incomplete Proposals

Any Proposal received by IUCN later than the stipulated RfP closing date and time, and any Proposal that is incomplete, will not be considered. There will be no allowance made by IUCN for any delays in transmission of the Proposal from Proposer to IUCN.

1.9. Withdrawals and Changes to the Proposal

Proposals may be withdrawn or changed at any time prior to the RfP closing date and time by written notice to the IUCN contact. No changes or withdrawals will be accepted after the RfP closing date and time.

1.10. Validity of Proposals

Proposals submitted in response to this RfP are to remain valid for a period of 90 calendar days from the RfP closing date.

1.11. Evaluation of Proposals

The evaluation of Proposals shall be carried out exclusively with regards to the evaluation criteria and their relative weights specified in *Part 3 of this RfP*.

PART 2 – THE REQUIREMENT

IUCN is seeking a contractor to create, develop and maintain its new corporate IUCN website. The requirements for this project are detailed in this section.

2.1 Background

2.1.1 IUCN Strategic considerations

IUCN is the world's largest and most diverse environmental network with over 1,400 government, non-government and indigenous peoples' organisation Members, more 15,000 volunteer experts, and hundreds of partners in the public and private sectors. It provides public, private and non-governmental organisations with the knowledge and tools that enable nature conservation and human progress to take place together.

2.1.2 Current website

IUCN website is accessible via this address: https://www.iucn.org. This website was launched in 2016 and since then it has only had minor functionality updates to try to improve it.

The website is managed jointly by the IUCN Global Communications team (GCU) and the Global Information System Group (GISG) and is supported by an external website contractor, who maintains, hosts the website and provides technical advice regarding updates or improvements to the CMS and hosting.

The current website is based on Drupal 7 / MySQL and is hosted on Google Cloud. Its theme is a customised version of Eunomic based on icompany theme, based on Twitter Bootstrap 2. The website is overall mobile friendly, but has a slow load speed (~5 – 6 seconds) on some pages. The Drupal CMS is configured to allow GCU (role *administrator*) to update content across the website, communications colleagues from specific units or regions (role *site manager*) to update content within their section and a few non-IUCN staff (role *contributor*) to edit pages which must be approved by a site manager before publication.

We do not expect to migrate all existing pages *(*content specifications are described in *Part 2.7*; migration requirements are described in *Part 2.8)*. But, for information, the website has currently around 33'000 pages, 32'300 document files and 62'700 image files. Pages are currently distributed between the below content types:

Content type	# all
Article	4.202
Blog entry	38
Book page	3.857
Data Tables	2
Gateway	57
Issues Briefs	33
Legacy articles	17.888
Multimedia item	85
Paper/Brief	10
Publication	5.994
Section Box	7
Section Home	86
Section Slider item	327
Section Top	388
Total	**32.974**

Besides, the website is currently interfaced with or extended to these external websites or services *(note that integration requirements are described in Part 2.9)*:

- an interface with [IUCN library portal](#) to retrieve IUCN publications
- an [embedded sign-up form for a newsletter](#) connected to IUCN's email marketing platform, [CiviCRM](#).
- An embedded [Members search form](#) displaying public data from CiviCRM.
- a [secure donation function](#) provided by a third-party provider
- a sub-domain managed by SFTP to allow the upload of multimedia stories created in third part provider applications (e.g. [this story](#)).

The website does not currently deliver on the objectives we have for our website or service our main audiences very well.

2.1.3 Why do we need a new website?

There are various reasons why we have decided to create a new website, but these are the most important:

1. **Strategic positioning:** Present IUCN's overall unique value proposition as a Union and its relevance to broader global or cross-cutting issues**.** Leverage the IUCN Nature 2030 programme to support IUCN's objectives through its web presence.

2. **Meet internal demands:** Ensure we meet corporate objectives balanced with the needs of stakeholder user groups. This includes being able to present content in an engaging and organised way on the website.

3. **Improve user experience:** Serve a diverse range of audiences so that they can quickly find what they need and explore other content on a site that reinforces IUCN's strategic positioning and value to the world

4. **Maintain security and improve reliability:** The current site is overextended technically, causing complications as well as security and reliability issues. Drupal 7 is reaching its end-of-life in 2022.

2.2   Scope of this RfP

The contractor will need to provide and manage the end-to-end development, hosting and maintenance of the website, including (but not limited to) the following items:

- Development of the website based on the Information Architecture and Design provided by IUCN
- Integration of the website with relevant IUCN systems
- Creation, testing and deployment of the automated migration of relevant content
- Testing and deployment of the website
- Hosting set-up and configuration
- Ongoing hosting monitoring and fine-tuning
- Ongoing support, maintenance and security management

Proposers should include information on how they will approach the end-to-end process. In addition, the proposers should also include in their proposals recommendations and a solid rationale for:

- Technical architecture (including CMS tool provider and all components/tools used)
- Hosting solution (including security solution(s)) as specified in *Part 2.14 Hosting*
- Content migration strategy to answer needs defined in *Part 2.8 Migration requirements*
- Deployment strategy
- Any third-party service required by the solution

Note that **Information Architecture and Visual Design** material will be provided (read below). **Copy writing** for the website is out of scope and will be done by IUCN staff.

2.3 Objectives

The new website must support the general objectives of the IUCN Communications Strategy. The information architecture and visual design incorporate IUCN's strategic communications objectives, and the development phase of the website project contributes in the following ways:

1. **External users:** Users will find, engage with and explore content using the features and tools outlined in the architecture and visual designs, and they will do so as expected, without delays or technical errors.

2. **Internal users:** IUCN units will have a variety of functional options to present their content, minimising the need for one-off add-ons or unique customisations. Site managers will have an intuitive CMS that encourages consistency while allowing flexibility and helps prevent mistakes or bad practice.

3. **Reliability and security:** The site will perform as designed even at sustained peak use or under other technical stressors and it will be secure against outside threats and unexpected outages.

2.4 Key audiences

The website has four priority audiences and several main audiences. Priority audiences are:

1. **Policy makers / decision makers:** Public policy experts employed by a State or a multilateral agency. Private sector or development agency decision-makers in fields with an impact on nature or that could benefit from our work. Need to see a highly functional website that displays quickly and allows easy skimming and navigating content.

2. **IUCN Members:** Individuals representing States and government agencies, INGOs, NGOs, Indigenous people, and other organizations. Have same web development needs as policy makers plus access to Member-specific information, usually through integrated or linked portals.

3. **Press:** International media, big press agencies, big regional/national outlets, media specialised in Environment or related topics, influential bloggers, with no distinction of type (web, news wire, press, radio, TV). Same needs as policy makers and academics/experts.

4. **Academics/Experts**: Conservation professionals, scientists and other academics. Need fast access to and organised displays of IUCN tools, reports and other knowledge products.

2.5 Structure and Information Architecture

The Full set includes:

- Analysis of the main personas
- The information architecture (target sitemap) for the website
- A set of 32 wireframes and a prototype
- Recommendations in terms of user experience
- A draft list of content types and taxonomies

A **sub-set** (target sitemap and key wireframes) **will be shared with the selected candidates invited to submit proposals**. The full set **will be shared with the Contractor**.

2.6   Design

IUCN is currently developing a new design that the new website will use. The creative agency in charge of the design will provide:

- a style guide
- original design files shared as .fig editable files ([Figma](#)) and .pdf format, clearly organised with layers and elements clearly grouped and labelled
- high-resolution images and vector files of individual design elements. E.g. icons and graphics will be shared in the appropriate web formats (svg, png, jpg, etc.).

We are expecting that the full design deliverables will be available by the time development work begins. The full set **will be shared with the Contractor**.

2.7   Functionality requirements

Key functionality must include:

- **A CMS based on a robust and simple-to-use modular design system**: we want to allow content creation to leverage page templates, content types and components to allow the creation of visually appealing pages on desktop and mobile.

- **A cost-effective and scalable CMS:** we want a CMS that provides easy to use publishing tools to produce pages that have impact, is easy to use and is inexpensive to maintain. The central team (webmaster and communications team) should be able to easily upload and change content across the site. Edits or new content must have the option to be previewed before being published, and in some cases sent for approval by the central team.

- **A CMS able to support integrations and migration needs**

2.7.1 Prerequisites

Minimal prerequisites for the website developed by the consultant are detailed below:

ID	Requirement	Description
The website needs to:		
PR01	Load quickly	The current load speed is over 5s for some pages. Ideally, we want the load speed no higher than 2s.
PR02	Be accessible and secure	As defined below in *Parts 2.10 to 2.12* (accessibility, browser and security)
The CMS needs to:		
PR03	Have different types of back-end users	The CMS must allow for different roles such as: administrator (access to all content and configurations), editor (Read-Write access to all content), section manager (RW access to defined section(s) of the website), contributor (can add/edit/submit content for approval in defined section(s), but cannot publish or un-publish). Possibly, Members may also need limited content creation access.
PR04	Have granular permission management	The CMS must allow read / write / delete access by role, by content and by section. Some fine-tuning is also expected at the field level. For instance, for the *article* content type, the field *article type* may take several values. Some specific values (e.g. *DG statement*, *IUCN statement*, *International Press release*) would be restricted to the Global Communication Team; other values (e.g. *press release*) would be open for other roles, but subject to approval before publication; other values (e.g. *news story*, *multimedia feature*) would be available for all roles for direct publication. <u>Note:</u> this can be optimised under the contractor's guidance
PR05	Allow menus, footer and sitemap management	The contractor is expected to define the menu system based on the wireframes and discovery specifications with IUCN. The CMS should allow the site administrator to amend this if needed.
PR06	Include content types management options	The contractor is expected to build the needed content types in full (structure, display, teasers, etc…) and the related needed lists and feeds, based on the wireframes and discovery phase. <u>Foreseen content types</u>, which will be fine-tuned during discovery with the contractor: *landing page, detail page (2 contents for navigation), article (e.g. for both "news" and blogs type articles), archived article, event, resource, publication, project, person,*
PR07	Include taxonomy management	The contractor is expected to build the needed taxonomy system based on the wireframes and discovery. <u>Foreseen taxonomies</u>, which will be fine-tuned during the discovery phase with the contractor: *priority, theme, topic, unit, region, country, resource type, event type, article type, person type (for experts), author (mainly for blogs)* <u>Foreseen taxonomies for archived articles:</u> *work area, legacy region, section, involved unit, legacy article type, legacy tag*
PR08	Include standard CMS features for content management	These are the features that we currently have and wish to find in the new CMS: - published / draft page - scheduling / revert options, revision log - taxonomy management and tagging for pages and assets - friendly urls and breadcrumbs - metadata config options - WYSIWYG, incl. customisation for corporate compliance, and a preview option - customizable back-end searches - for admin role: bulk actions, alias, redirect, etc...
PR09	Provide robust and flexible theme and stylesheets options.	Based on guidance from the contractor, solutions/options/configurations that both allow robust styling features and are easy to set up, enforce and maintain in the long run should be privileged. <u>Currently:</u> Our current CSS stylesheet setup makes system updates extremely test heavy. We have a variety of stylesheets; some apply at the global level, others at the content type level and finally with we have variations between published / preview and edit mode due to the existing configuration. On top of that, CSS customization of image-text displays add a layer of complexity that tends to break with new updates. All this makes it difficult to maintain.

PR10	Provide media management options	The CMS must include a system and options for managing assets (pdf/doc/xls/zip files, images, videos, digital stories, audios, datasets, etc…). The contractor is expected to advise on the optimal system acknowledging needs PR10.a, PR10.b, PR10.c as well as PR01.
PR10.a	File specifications	Requirements for files: - metadata needed: description, file type, taxonomies for management and search - limitations to file (weight, format) adjustable by the admin role - files owned and updatable by unit, not individual users Nice to have: - tool/process to **avoid upload of duplicate files** - sound options for revisions of files in order to both avoid broken links and prevent cache confusion. - workflow to authorize public display of file Currently: site managers tend to upload files without optimizing the file size. This is a problem as we have audiences in low bandwidth countries. As file upload is a decentralised process, some site managers upload duplicate files, upload files that are supposed to be uploaded to the Library portal or keep old versions of files.
PR10.b	Image specifications	Requirements for images: - metadata for crediting, storytelling in multiple languages and SEO - taxonomies for back-end management and search - limitations (format, max weight, min and max dimensions) adjustable by the admin role - images owned and editable by unit, not individual users Nice to have: - tool/preview to confirm minimal quality - optimally resize image to speed up page load time (while maintaining quality) Currently: site managers tend to upload images at maximum resolution and oversized dimensions; they are unable to optimize the image so that it remains excellent quality but with a reasonable file size for quicker display on the page.
PR10.c	Video specifications	Videos may be used in pages, in banners or in multimedia features. Note on videos: most videos are currently hosted on IUCN's official YouTube channel, with a few exceptions (Vimeo or another third-party channel). Videos should not be uploaded via the IUCN website CMS,
PR12	Provide an option to display searchable dynamic tables	We currently have a *data table* option to display searchable dynamic and responsive tables. We should maintain this option. Example: Rio Doce Panel recommendations
PR13	Provide an option to add Dublin Core Metadata	We currently have content tracked by *Altmetric* which need specific DC metatags. We should maintain this option as optional for site managers for the *resource* content type. Example: Rio Doce Panel issue paper
PR14	Provide an option for a contact form	Users should be able to contact IUCN via a single form with up to 10 options (e.g. based on enquiries). Currently the contact information is disseminated throughout the web pages and we wish to simplify and funnel this process for users.
PR15	Have a function to share content on social media	Users should be able to share content on social media: Facebook, Twitter, LinkedIn, Instagram, email, etc. This must be configurable in the content metadata so that a compelling image and text is automatically populated on social media once sharing. Currently we are using AddThis.
PR16	Have a commenting option	Users should be able to provide comments/contributions to contents. - comments should be open for specific contents only - comments should be moderated before publication Nice to have: - options to handle / automatize the management of spam comments (from bots or real users)

2.7.2 Strategic functionalities

Functionalities for which IUCN awaits strategic guidance from the contractor during discovery phases are detailed below. IUCN prioritizes quality, robust and effective solutions that are simple to set up, enforce and maintain in the long term. The proposers are invited to demonstrate their competence by highlighting approaches or relevant previous experience in their proposal as specified in *Part 4.2 Technical information/Service Proposal*.

ID	Requirement	Description
Strategic functionalities for which the contractor's expertise is needed		
SR01.a	Be strong and flexible in terms of page template	The CMS must allow site managers to create content based on simple standard templates which include a mix of mandatory and optional elements and which ensure: - a seamless reading flow across images, multimedia, text and CTA - consistency in the Look & Feel throughout the website The CMS should allow the admin role to manage templates.
SR01.b	Be strong and flexible in terms of customization and components	The CMS must also allow further customization of select key pages as defined in the wireframes. In particular, the CMS must allow the creation of components that may serve different purposes: - targeted use on a specific page or reused as global component across several pages - coded to display related content that leverages taxonomy with options to override or curate contents - syndicated to pull information from external source like the Open Project Portal which uses the IATI format - multimedia focussed to present dynamic content like video, audio or interactive content to allow the creation of visually appealing long-form storytelling (see *requirement SR04* below) The Library of components should be built by the Contractor and may be further built or amended by the admin role. Components should be easily added, moved or removed from pages by site managers
SR02	Be flexible in terms of promotion workflows	The CMS must ease the management of promoted content or cross-links and could use enhanced back-end features to help identify linkages. Based on the wireframes and discussions with IUCN, we expect the contractor to recommend best approaches for specific places, for instance: (i) PUSH mechanism, (ii) PULL mechanism, (ii) automatic feed sorted by date DESC, (iv) based on an optional component to include, etc... Context: The global communications unit (GCU) handles content promotion at the top level, but at lower levels in the navigation, this task is delegated to selected specialised units. For instance: GCU handles featured content on the gateway page for each theme; different specialised unit will manage featured content on the pages dedicated to a topic, region, unit.
SR03	Offer flexibility in terms of publication workflow	The CMS must provide quality checks options before publication for a few select contents. Solutions that support users in their tasks should be privileged (e.g. notifications) Context: content management is decentralised in IUCN. We thus need quality assurance options before sensitive contents are made public. For instance: This may be needed for specific types of *articles* such as *press release*.
SR04	Feature multimedia stories	Currently, we are using external platforms to produce multimedia stories and save them to a separate folder on the server. These stories incorporate video, audio, images, interactive maps, text and other interactive features. We would like to either: 1) (strong preference) create digital stories in the CMS 2) seamlessly integrate in the website the multimedia stories created on external platforms. OR 3) use a mixed approach as relevant Examples: Traded, Forests storymap, Humpback whale migration story

ID	Requirement	Description
SR05	Include a powerful search system	The CMS must allow for search configuration and optimisation. We need 2 searches in the front-end: S1 = general website search, S2 = resource search. We need admin searches in the back end to help manage content and assets. Details will be defined during a discovery phase with the developer based on the wireframes and discussions with IUCN. Foreseen needs: indexing of relevant content, possibility to exclude content from search, use of filters or free text, user-friendly search results presentation.
SR06	Include a mass upload functionality for files	The CMS must allow options for mass upload of files and associated metadata and tags. This is needed for both image and document files.
SR07	Provide advanced and flexible options for a full or partial multilingual website	IUCN is present worldwide and has 3 official languages: English, French and Spanish. The CMS must allow the translation in these 3 languages, as well as offer options to display content in additional languages for specific audiences (e.g. Japanese, Russian, Arabic, Chinese, Vietnamese, …) Note: innovative automatized solutions are welcome and can be suggested by proposers. However note that we need to maintain the ability to override the automated service (i.e. where accuracy is expected for technical or political terms; e.g. use the correct name for a State). In such case, these solutions should be priced separately.
SR08	Link with analytics	The CMS must be linked with an existent Google Analytics account and with a Google Tag Manager account (to be created and configured) for content grouping analysis.

2.7.3 Nice to have options

The CMS nice to have options or functionalities are listed below.

ID	Requirement	Description
It would be nice to…		
NTH01	Have a tool to validate broken or stale links	So that we may easily detect and then replace any links causing issues
NTH02	Be able to force correct option	e.g. maximum character count for fields in the back end, etc…
NTH03	Provide customizable 403 and 404 pages	The 403 and 404 should be manageable by the admin role and should rely on page templates.
NTH04	Offer private / public content options	Some contents may be used in the back-end for editing or checking purposes, but are not meant for public consumption. In such cases, these contents should be hidden from public, excluded from the public-facing search results and not found by search bots (e.g. Google).
NTH05	Have a quote sharing functionality	Users should be able to share selected portions of text or quotes.
NTH06	Have a glossary add-on functionality	As per the wireframes, site managers should be able to add a definition to a particular term used. When users click / hover over the term, the definition shows as a tooltip.
NTH07	Have an easy to use map functionality	For the project map on region page. It would be nice if this was compatible with IUCN's existing ArcGIS system.
NTH08	Provide options to display social media feeds on the website	Such as twitter, Instagram, Facebook, Linkedin, YouTube playlists, etc…

2.8   Migration requirements

2.8.1   Export-import mechanism for news

The contractor will automatize the migration of these contents:

- (old website) articles published in 2020 and 2021 into (new website) *article* content type
- (old website) articles[1] published before 2020 into (new website) *archived article* content type (overall a similar version of "article" with a clear mention indicating to users and social bots that the content was published years ago)

Expected migration results includes the extraction of about 9,000 articles with associated files, images, taxonomies and metadata from the current IUCN CMS, based on Drupal 7 and using a MySQL database, and the importing into the next website using a CMS and a database to be defined with the contractor.

Migration deliverables are defined as follows and will be guaranteed through appropriate project management:

- Analysis of the current CMS and its export capabilities
- Creation, testing and quality assessment of the export-import mechanism for articles
- Final import of articles in the new CMS
- Configuration as necessary for the warning mention

2.8.2   url structure migration for users and SEO

The contractor must make plans to ensure that SEO is not affected during the change from the old to the new website. Noting that the Information architecture proposes a new navigation which will impact the url structure.

The contractor should also have a tool to validate broken or stale links so that we may easily detect and then replace any links causing issues.

IUCN identified these needs:

- automated redirection needed for migrated articles (see *Part 2.8.1*)
- redirection of old urls for select high traffic content, menu pages, strategic content such as issues briefs, blogs and strategic short links and permalinks (estimated to 500 urls)

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[1] Technically, there are two content types that will need to be considered in this part 2.81: *articles* and *legacy articles* (which are 99% similar in format).

2.9 Integration with IUCN systems or third-party systems

The contractor and the Global Communications unit will be working with the support of IUCN's Global Information System Group (GISG) to set up the necessary integrations between the website and the systems listed below:
- IUCN's main applications
- IUCN's Open Project Portal
- IUCN's Library system
- (embed form) Newsletter subscription
- (embed form) Members search
- (embed form) Donation facility

2.9.1 IUCN's main applications

IUCN's client relationship management (CRM) and HR management system (HRMS) include the master data for lists such as:

- Standard lists: Regions, Countries
- Entities: Secretariat units, Commission units, Commission specialist groups
- People: Experts (from Secretariat and from Commissions)

These lists will be editable in the main applications only and the integration could be done via web services.

2.9.2 IUCN Open Project Portal

IUCN projects are managed in our internal Project Portal. IUCN's Open Project Portal pulls the publicly available project information from the Project Portal.

These are the needs in terms of integration:

- Project information on the website is read only and comes from the Open Project Portal via an automated integration
- By default, project information is unpublished
- On the website, we decide which projects to publish and where to feature them – i.e. taxonomy is applied on the website (e.g. region, theme/topic, unit)
- We can add communication material on projects on the website (e.g. brochure, video, micro-site to present deliverables)

Note that the Open Project Portal is built to facilitate integration via web services.

2.9.3 IUCN's Library system

IUCN's Library Portal is the Master database for IUCN Publications. The current database is built on Drupal 7 and accessible here. The current integration is based on a web service (xml data mapping is formalised in a txt file). There is a plan to migrate the Library system once the new website is launched (estimated 6 months after the go-live).

These are the needs in terms of integration:

Phase 1 - Integration with the current Library system (Drupal 7)

- The current integration is carried over to the new website
- The mapping is adjusted (library taxonomy <> new website taxonomy) and made manageable in the CMS by the administrator (this would replace the txt file).
- Looking into web services options that minimize the impact once the library portal is migrated as well

Phase 2 - Integration with the new Library system (unknown platform)

- A new integration is built (bulk of work on the Library side)
- The mapping is adjusted if and as needed to adjust to the new library taxonomy if relevant.
- The new integration is tested
- The new integration is activated and replaces the old integration.

2.9.4 Newsletter subscriptions and Members search

We currently have a form embedded into our website that allows users to subscribe to our newsletter. This form is added via an iFrame and is not really responsive. This will not be changed on the new website.

A Members search form is also embedded to allow the public to search our Members database. This form is added via an iFrame and is not responsive. In the new website, this could be a web service.

2.9.5 Donation facility/Payment gateway

We currently have a secure donation option on the website which will change in a near future (Braintree). The new donation gateway will need to be embedded in the corporate website.

2.10 Accessibility

The website should adhere to the latest WCAG standards (2.1). The website will be available in IUCN's three official languages: British English, Spanish and French.

2.11 Browsers and device support

The website design should be fully adaptable across mobile, tablet and desktop – we welcome recommendations on whether a responsive design or adaptive web design is the best option. Currently 68% visit our site via desktop, 30% via mobile and only 2% via tablet. However, we would like to optimize the website for mobile use.

Of mobile and tablet devices, the vast majority visit our site either on an iPhone or iPad, followed by Samsung Galaxy. The website should function for iOS 13 and Android 7. For desktop, the website should function in the latest versions of Chrome, Safari and Firefox and Microsoft Edge.

2.12 Security and legal

Maximum level of security, preventing breaches such as spam, viruses, phishing, DOS and DDOS attacks, site hijacking, unapproved posting and content, FTP access and personal information, content or database thefts. IUCN reserves the right to mandate a third-party company to pen-test the delivered site after go-live and at regular intervals subsequently. After golive, any resulting fixes will need to be implemented by the Contractor.

The website must be SSL protected. IUCN will provide the SSL certificate information and the contractor will install it on the server.

Finally, the website must be compliant with GDPR and there must be a fully GDPR compliant Cookie Consent module included on the site. The contractor must also provide IUCN with details of all cookies applied to the site, to be used in the Privacy Policy (this does not need to be included in the proposal), as well as describe all personal data collected throughout the site and the reasons for the collection.

2.13 Search Engine Optimisation

On top of the SEO work described in *Part 2.8.2*, the proposer should also include a non-binding proposal for an ongoing SEO strategy to help us identify key search terms and improve our ranking. This should also include ongoing SEO monitoring and optimisation.

2.14   Hosting

Proposers should include both <u>details on the hosting solutions required by their proposal</u>, as well as a <u>non-binding hosting proposal for 2 years</u> starting 1 month before the website is launched.

2.15   Ongoing support and maintenance

After its launch, the website will need:

- •   Modifications and improvements that do not modify the core structure of the website that will be developed;
- •   Standard maintenance, backup and updates to the server and the CMS environment;
- •   Security maintenance of all components/tools required by the website,
- •   Ongoing maintenance and improvement of SEO.

We are looking for a contractor who can help IUCN navigate technological decisions by clearly explaining the risks, benefits and potential alternatives for meeting certain objectives. The contractor should also be proactive in their maintenance of the website, offering advice and solutions to IUCN on an ongoing basis.

The expectation is for the contractor to respond with a solution within 6 hours to any issue regarding security and 24 hours to any client request involving modifications. There must be an issue management system in place that allows IUCN to track progress on issues and hours spent by the contractor.

The maintenance contract for the website will be offered for two years for an estimated number of up to 300 hours of maintenance starting with the date of the website launch. The contract will be renewed annually at the mutual agreement between IUCN and the contractor.

Further developments needed to the website that are not in the scope of this RFP or the maintenance and require additional effort from the contractor will be mutually agreed and acknowledged accordingly in future maintenance contracts.

2.16   Training

The proposers should include training for the administrator and the site managers, including training material (tutorials, videos).

2.17   Timeframe

The new website would ideally be ready for launch by ==15 March 2022==. The below target dates represent a general workflow that will help IUCN manage content production and management toward the launch date. Items labelled TBD are items where IUCN will leave the delivery deadline to the Contractor so long as it occurs before the launch date or a suggested date in the Note column.

The production environment should be set up at a date to be discussed between IUCN and the contractor in order to allow enough time for content population before the launch.

Target dates	Item	Note
End Q2/2021	Kick off and discovery phases (I)	
Q3/2021	CMS set-up. Minimum content types ready to use: *landing page, child page,* & *resource*	Constraints: - IUCN to start setting up the main structure skeleton and test pages population - related to the integration with Library Portal
Q3/2021	**Integration with main IUCN applications** completed and taxonomies setup.	
Q3/2021	**Integration with Library Portal** completed.	
End Q3/2021	Discovery phases (II)	
Q4/2021	Priority components built	
Q4/2021	Minimum content types ready to use: *article, event, unit,* & *project*	Constraint: IUCN to start training site managers to populate *topical pages, articles, events, units* Prepare integration with Project Portal
Q1/2022	**Integration with Project Portal** functional: *Project* content type and map/list of *projects*.	Constraint: IUCN will then need to select projects to feature once the integration is functional
Q1/2022	**CMS training** **Site managers update the content**	Constraint: we'd like to offer 4 weeks after the training to allow site managers to create their content into the CMS.
TBC	**Migration completed**	Target: launch – 2 weeks (or to be agreed)
==March 2022==	**Website go-live**	DNS record amended by IUCN GISG
Phase 2 deployments		
TBD	**Integration - Donation gateway** **Integration - Newsletter subscription** **Integration - Members search**	Target: launch + 3 months
TBD	**Integration with new Library Portal** completed.	Estimate: Launch date +/- 6 months Align date with development planning of new Library Portal
TBD	Secondary components built Content type: *person*	Analyse integration feasibility with CRM system and GDPR considerations

PART 3 – THE EVALUATION MODEL

This procurement is split into two phases (for dates, please see section 1.4):

1. Interested Proposers must submit their Portfolio of relevant work and answers to the pre-selection questions (as per the details in *Part 4.1* and to be evaluated as specified in *Part 3.1*).
2. Based on the Pre-selection submissions, IUCN will select up to ten candidates to submit full Proposals (as per the details in *Parts 4.2-4.3* and to be evaluated as specified in *Parts 3.2-3.4*).

The evaluation of proposals shall be carried out exclusively with regards to the evaluation criteria and their relative weights specified in the tables below:

3.1. Pre-Selection

	Pre-Selection criteria	Score	Weighting	Total
1	Signed Declaration	Y/N	n/a	required
2	Quality and relevance of Portfolio	1-5	10	50
3	The Proposer is an established organisation with relevant experience	1-5	6	30
4	The Proposer has reasonable staffing levels for this size project	1-5	4	20
	Total Pre-selection Score		**20**	**100**

3.2. Technical evaluation of Proposals

	Evaluation criteria	Score	Weighting	Max point
1	Approach and implementation plan, including demonstrated ability to meet deadlines	1-5	5	25
2	Adequacy of technology and systems proposed, including demonstrated expertise in proposing robust options to 5 key requirements from IUCN	1-5	6	30
3	Experience in developing websites and handling projects of similar scope and size, including the provision of training	1-5	5	25
4	Sufficient, relevant and competent staff	1-5	3	15
5	Positive and relevant references	1-5	1	5
	Total Technical Score		**20**	**100**

Each criterion will be scored out of 5 (where 1 – Does not meet the requirements, 2 – Basic, 3 – Good, 4 – Very good, 5 – Outstanding). Any proposals scoring 1 in any criterion will not be considered further.

A minimum of 60 points (Quality Threshold) needs to be obtained in the Technical Score in order to be considered for financial evaluation.

3.3.   Financial evaluation of Proposals

The financial evaluation will be based upon the Total Price Estimate submitted in the Proposal. The Financial Score will be calculated by dividing the lowest bid price value (of those bid's that met the Quality Threshold) by the evaluated bid's price value, multiplied by 100.   Thus:

$$\text{lowest bid value} = \text{CHF } X$$
$$\text{bid A's value} = \text{CHF } Y$$
$$\text{bid A's financial score} = (X / Y) * 100$$

3.4.   Total Score

The Total Score will be the weighted sum of the Technical Score (60%) and Financial Score (40%).

The contract will be awarded to the Proposal which has obtained the highest Total Score subject to the Proposal Conditions in *Part 1* above and the following caveat:

IMPORTANT: In the event that the Proposal achieving the highest Total Score is deemed not affordable, IUCN reserves the right to engage in direct negotiation with the 3 (three) highest-scoring Proposers to identify whether any – and, if so, which – aspects of the Requirement may be excluded in order to reduce the total price to an affordable level. In this case, the terms and criteria of the final selection will be communicated to the three highest-scoring Proposers prior to opening the negotiations.

PART 4 – INFORMATION TO BE PROVIDED BY PROPOSERS

By participating in this RfP, Proposers are indicating their acceptance to be bound by the conditions set out in this RfP.

This Part details all the information Proposers are required to provide to IUCN. Submitted information will be used in the evaluation of Proposals. Proposers are discouraged from sending additional information, such as sales brochures, that are not specifically requested.

Each of the following must be submitted as a separate document, and will be evaluated separately.

4.1. Portfolio and pre-selection questions submission

1. Declaration: Please read and sign the Declaration and include this in your submission.

2. Portfolio: Three examples of live websites that the Proposer has created and developed end-to-end (including all items listed under *Part 2.2*). The examples should reflect projects of a similar nature to the one in this RfP.

3. Written answers to pre-selection questions evaluating the experience of the Proposer:

   a. How long has the Proposer been delivering services similar to those in this RfP?
   b. What is your core business as a company?
   c. Why are you best placed to help IUCN meet its objectives for a new website?

4. Written answers to pre-selection questions evaluating the staffing capacity of the Proposer:

   a. How many employees does the Proposer have and where are they based?
   b. How many employees would you allocate to this project?
   c. Are you able to provide all elements of this RfP in-house? If not, please clarify which elements would be outsourced and relationship with any sub-contractors.

4.2. Technical information/Service Proposal

If invited to submit a full proposal following the Portfolio and pre-selection questions submission, Proposers are required to submit the following details in their technical proposal:

1. **Approach and plan** - A Proposal detailing the **Proposer's approach and implementation plan** for the development of the website. The Proposer should also include a suggested timeframe for testing and debugging each deliverable and allow IUCN 3 days to provide feedback, as well as a concrete description on how the Proposer will ensure that the components are ready by the deadlines indicated in the timeline in *Part 2.17 Timeframe* and what actions it suggests taking in case of delays;

2. **Technology and systems** – A proposal detailing the technology (CMS) and systems (functionalities) or approaches (from relevant previous experience) of the Proposer to answer IUCN requirements and especially demonstrate the Proposer's expert ability to tackle specifically the below requirements from IUCN as described in *Part 2.7 Functionality requirements*:

   PR01 - Load quickly
   PR10 [2] **- media management options (esp. for files and images)**

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[2] incl. a) and b) specifications

SR01 [3]**- strong and flexible in terms of page template and components**
SR02 - flexible in terms of promotion workflows
SR05 - powerful search system

3. **Previous experience in handling development projects of similar scope and size** – Details of three relevant examples of past work demonstrating the capacity of the Proposer to produce quality websites, which are comparable to this project, and to provide appropriate CMS training for site managers. Please mention any differences in scope or timeframe between the examples and what the Proposer would provide for IUCN;

4. **Outline of the team** - with names and expertise that the Proposer will assign to the project for all aspects;

5. **References** – contact details of 3 referees familiar with the Proposer's experience relevant to website and online system development;

6. Website of the Proposer;

7. Confirmation that the Proposer will have the personnel and other capacity to develop and deliver by the schedule in *Part 2 The Requirement* of this RfP; if the Proposer is based in a different time zone, please add a short paragraph on how you will ensure efficiency in coordinating and delivering services efficiently.

8. A statement that Proposer accepts the terms and conditions of the contract as set forth in *Part 5 Proposed Contract* of this RFP. If Proposer is unwilling to accept the terms and conditions, the Proposer shall identify those terms and conditions it does not accept, and, if applicable, shall include proposed alternative terms and conditions that would be acceptable to the Proposer; and

9. Additional Services – details of additional, related services that the Proposer considers would enhance the overall effectiveness of communications in support of the project. Please note that these will not form part of the evaluation of Proposals and will only be used in the final contract negotiations with the selected Proposer.

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[3] incl. a) and b) specifications

4.3. Financial information

Prices include all costs

Proposers are required to submit a price for all items listed in the table below. Submitted rates and prices are deemed to include all costs, insurances, taxes, fees, expenses, liabilities, obligations, risk and other things necessary for the performance of the Requirement. Any charge not stated in the Proposal as being additional, will not be allowed as a charge against any transaction under any resultant Contract.

Please submit costs for items in cells marked with an "x" in the following table and distinguish one-off cost from recurring costs:

Item	Binding offer required	One-off cost [e.g. setup]	Recurring cost [annual basis]	Hourly rates [For information]
Development, testing and deployment incl. integrations	yes	x		x
Cost of specific solutions necessary to meet the need of this RFP, but not provided by the CMS (cost per solution)	If possible	(x) **(if applies)**	(x) **(if applies)**	
Migration of content	yes	x		x
Training	yes	x		x
Project management	yes	x		x
Ongoing support, maintenance and security management for 2 years after the launch	yes		x	x
Hosting proposal for 2 years after the launch	no	(x) **(if applies)**	x	
(Additional) Ongoing SEO strategy and optimisation for 1 year	yes	x	x	x
(Additional) additional services proposed by the bidder to improve the overall product but not required by this RFP	yes	(x) **(if applies)**	(x) **(if applies)**	(x) **(if applies)**
TOTAL PRICE		**x**	**x**	

Travel costs: IUCN does not expect the Contractor to need to travel to fulfil the requirements in the RfP, therefore Proposers should not include travel costs in their proposals.

Applicable Goods and Services Taxes: As IUCN is VAT exempted in Switzerland, proposal rates and prices shall be exclusive of Swiss Value Added Tax.

Currency of proposed rates and prices: Unless otherwise indicated, all rates and prices submitted by Proposers shall be in Swiss Francs.

Rates and Prices: Within the total price, please also indicate for information purposes the daily consultancy/development rates upon which the price offer is based.

Additional services

If the Proposer elects to include additional services or items, please provide separate fixed and firm prices for each additional service, including:

- Recommended improvements or additional functionalities not described in this RfP;
- Recommended third party services or licenses.

PART 5 – PROPOSED CONTRACT

Below is the proposed Contract for the new IUCN Save Our Species website. IUCN reserves the right to amend the proposed Contract prior to signature but, in submitting a Proposal, Proposers acknowledge that this is a standard IUCN contract template and will only be amended at IUCN's discretion.

TEMPLATE CONSULTANCY AGREEMENT

[sections to be completed]

CONSULTANCY AGREEMENT
(the **"Agreement"**)

between

IUCN, International Union for Conservation of Nature and Natural Resources, an international association established under the laws of Switzerland, with its World Headquarters located at Rue Mauverney 28, 1196 Gland, Switzerland (hereafter "**IUCN**"),

and

[full legal name of other party], [type of company] established under the laws of [name of country], with headquarters located at [address], [country] (hereafter "**Consultant")**

IUCN and the Consultant shall be referred to herein individually as a "Party" and together as the "Parties".

PREAMBLE

Whereas the mission of IUCN is to influence, encourage and assist societies throughout the world to conserve the integrity and diversity of nature and to ensure that any use of natural resources is equitable and ecologically sustainable;

Whereas IUCN wishes to obtain advisory and consulting services from the Consultant for website development, maintenance [and hosting] services and the Consultant agrees to assist IUCN with such services under the terms and the conditions set forth in this Agreement.

Whereas the Consultant has represented to IUCN that it has the required expertise and experience;

Now therefore the Parties agree as follows:

1. SERVICES

1.1 The Consultant will [short description of the services], perform the tasks and deliver the deliverables no later than the agreed deadline(s) as set out in the terms of reference attached as Annex I (the "Services").

1.2 The Consultant will assign [name of the person(s) and title(s)] (the "Key Personnel"), who is/are(an) employee(s) of the Consultant, to the performance of the Services on behalf of the Consultant. The replacement of any Key Personnel must be approved in advance by IUCN in writing.

1.3 IUCN reserves the right to request any reports (progress, financial or otherwise additional to those required under the Agreement), which could be considered to be reasonably required to evidence satisfactory performance under the Agreement. All financial records and other relevant documents relevant to or pertaining to this Agreement may be subject to inspection and/or audit at the discretion of IUCN or of the Donor. The Consultant agrees to allow IUCN or Donor's auditor(s) access to such records during normal business hours and to allow interviews of any employees who might reasonably have information related to such records. In the event of inspection or audit, IUCN or Donor shall provide the Consultant reasonable prior written notice.

1.4 The Consultant shall not subcontract the Services to third parties without the prior written consent of IUCN. However, the Consultant may under its own responsibility use the services of others provided such services are of an auxiliary or clerical nature.

2. TERM

This Agreement comes into effect on [date] [or] [upon its signature by both Parties] (the "Effective Date") and will expire on [date] (the "Expiration Date").

3. INDEPENDENT STATUS

3.1 The employees, directors or shareholders of the Consultant shall not be entitled to any pension, bonus or other fringe benefits from IUCN.

3.2 The Consultant shall have no authority to enter into contracts or to incur any other legally binding commitment on behalf of IUCN.

3.3 No employee, director or other representative of the Consultant shall hold him or herself out or permit itself to be held out as having authority to do or say anything on behalf of or in the name of IUCN.

3.4 The Consultant shall be solely and exclusively liable for any and all taxes, levies or dues required to be paid in any of the countries where this Agreement applies, on any amounts paid to the Consultant by IUCN and has sole responsibility for declaring such amounts to the relevant tax authorities.

4. OBLIGATIONS

4.1. The Consultant shall carry out its duties in an expert and diligent manner and to the best of its ability and shall promptly and faithfully comply with all lawful and reasonable requests which may be made by the IUCN Contact Person.

4.2. The Consultant shall give written or oral advice or information regarding the execution of the Services as and when required by IUCN.

4.3. In the case of illness or accident or a case of Force Majeure as described under clause 16.3 preventing the Key Personnel from performing the Services, the Consultant shall promptly notify IUCN in writing of impediment.

5. REMUNERATION

5.1   As full remuneration for the Services performed under the terms of this Agreement, IUCN shall pay the Consultant a fixed and firm lump sum of [**currency/amount in numbers (amount spelled out in letters)**] ("the Remuneration") based on [number of days] days of work at a daily rate of [daily rate] as follows:

5.1.1   A first instalment of [currency/amount in numbers (amount spelled out in letters)] corresponding to 30% of the Remuneration upon receipt of a signed copy of this Agreement together with a first invoice;

5.1.2   A second instalment of [currency/amount in numbers (amount spelled out in letters)] corresponding to 30% of the Remuneration [please indicate what task(s)/deliverable(s) will trigger payment] and presentation of the corresponding invoice; and

5.1.3   A third and last instalment of [currency/amount in numbers (amount spelled out in letters)] corresponding to remaining 40% of the Remuneration upon satisfactory and timely completion and IUCN written acceptance of all Services as specified in Annex I. The final invoice must be submitted no later than [insert the no. of days e.g. 30 days] after IUCN's written acceptance of all Services or after the Agreement end date whichever is later.

5.2   The Consultant must submit a valid invoice quoting the Contract Reference Number and number of the instalment for each payment to be made.

5.3   If the tasks defined in the Agreement are not fulfilled to the satisfaction of IUCN within the requested time limit, IUCN reserves the right to withhold any further payments and recuperate any funds already paid for unfulfilled Services.

5.4   IUCN shall make payments to the Consultant's bank account (to be opened in the name of the Consultant in the place where Consultant is established or where the Services are provided) as follows:

Complete Account name: [xxx]
Account type and currency: [xxx]
Bank name: [xxx]
Bank address: [xxx]
Account No.:   [xxx]
SWIFT Code or other bank routing code: [xxx]
IBAN No: [xxx]

5.5   The Consultant shall bear bank charges for international wire-transfers (namely from the Consultant's bank or any intermediary banks) associated with any transfer of funds that IUCN may make hereunder.

5.6   Funds that remain unused at the Expiration Date or termination date of this Agreement must be returned to IUCN within sixty (60) days following either of such dates, as applicable.

6. TRAVEL EXPENSES

Not applicable.

7. CONSULTANT'S WARRANTIES AND UNDERTAKINGS

7.1   The Consultant warrants that its performance of the Services under the terms of this Agreement will not infringe on the rights of any third party or cause the Consultant to be in breach of any obligation towards a third party.

7.2   The Consultant warrants that it has obtained the assignment of all Results and Intellectual Property rights pertaining to the Results from his employees (including without limitation the Key Personnel).

7.3   The Consultant shall maintain at its sole expense liability and any other relevant insurance covering the performance of this Agreement. IUCN may require the Consultant to provide a certificate of insurance evidencing such coverage.

7.4   The Consultant represents and warrants that no part of the Remuneration shall be provided to, or used to support, individuals and organizations associated with terrorism as identified on any sanction list published by the European Union, the United States Government, the United Nations Security Council or other relevant agency or body.

8.   CONFIDENTIALITY

8.1   The Consultant will not disclose or use, at any time during or subsequent to this Agreement, any confidential information of IUCN or any other non-public information relating to the business, financial, technical or other affairs of IUCN except as required by IUCN in connection with the Consultant's performance of this Agreement or as required by law. In particular, but without prejudice to the generality of the foregoing, the Consultant shall keep confidential all Intellectual Property and know-how disclosed to it by IUCN, which becomes known to it during the period of this Agreement or which it develops or helps to develop in providing the Services to IUCN.

8.2   The Consultant may communicate confidential information only to those of its employees who are directly and necessarily involved in the performance of this Agreement or who are bound to the Consultant by obligations no less stringent as the ones mentioned in this Agreement.

8.3   The Consultant shall:
8.3.1   not disclose to third parties (including news and social media) without express prior written consent of IUCN the contents of this Agreement and the results of work performed as part of the provision of the Services;
8.3.2   disclose know-how and other confidential information of IUCN which is provided by IUCN to the Consultant for the purpose of carrying out the Services only to those persons necessary to accomplish the Services and only to the extent necessary for the proper performances of the Services or to persons bound to the Consultant by obligations no less stringent as the ones mentioned in this Agreement.

8.4   The Consultant agrees to immediately notify IUCN in writing if it becomes aware of any disclosure in breach of the obligations of this clause 8. It shall be responsible for any breach of these obligations by its employees or subcontractors. The Consultant will take all steps necessary to prevent further disclosure.

9.   PROPERTY OF RESULTS

All notes, memoranda, correspondence, records, documents and other tangible items made, by the Consultant in the course of providing the Services will be and remain at all times the property of IUCN. At any time, even after the termination of this Agreement, the Consultant shall, upon request, promptly deliver to IUCN all such tangible items which are in its possession or under its control and relate to IUCN, its business affairs and clients and/or the Services.

10. INTELLECTUAL PROPERTY

10.1   Intellectual Property rights are any and all rights and prerogatives, registered or not, arising from the Swiss and international legislation on the protection of notably patents, design, trademark, as well as know-how and trade secrets.

10.2   Pre-existing Intellectual Property (Pre-existing Rights") of a Party means any rights, title and interests in, to and under any and Intellectual Property that have been conceived or developed by such Party prior to the Effective Date or that is conceived or developed by such a Party at any time wholly independently of the implementation of this Agreement. Subject to the rights and licenses expressly granted under this Agreement, each Party shall retain ownership of its Pre-existing Rights. The Consultant hereby grants to IUCN a non-exclusive, worldwide, perpetual, royalty free, sub-licensable license to use Pre-existing Rights incorporated in

the Services. The Consultant shall ensure that it has obtained all the rights to use any Pre-existing Rights belonging to third parties that are necessary to implement this Agreement.

10.3   All Intellectual Property rights, including copyright, in the Services produced under this Agreement are vested in IUCN and the Consultant hereby assigns and agrees to assign to IUCN, with full title guarantee, all rights in and to any Intellectual Property resulting from the implementation of this Agreement for the full duration of such rights, including, without any limitations, the right to use, publish, license, translate, sell or distribute, privately or publicly, any item or part thereof wherever in the world enforceable.

10.4   The Consultant confirms that IUCN shall have all rights of development, manufacture, promotion, distribution and exploitation in relation to the projects undertaken and products developed in the course of the provisions of the Services and the Intellectual Property created or arising from the provision of the Services.

10.5 Neither Party shall have the right to use the other Party's name, logo and/or other trademarks in any medium and for whatever purpose without the other Party's prior written consent in each instance of use.

11. LIABILITY AND INDEMNITY

11.1   IUCN shall not be held liable for any damage caused or sustained by the Consultant, including any damage caused to its employees and / or third parties as a consequence of or during the provision of the Services or the implementation of the Present Agreement.

11.2   The Consultant agrees to indemnify and hold IUCN harmless from any and all losses and damages that IUCN may incur as a result of Consultant's actions or omissions in rendering the Services or the breach of any of the Consultant's obligations contained in this Agreement.

12. COMMUNICATION AND NOTICES

12.1   All correspondence and notices in connection with the implementation of this Agreement must be directed as follows:

IUCN Contact Person	Consultant Contact Person
[name] [title] [name of IUCN Programme/Office] [address] [phone] [email]	[name] [title] [address] [phone] [email]

12.2   In case the Contact Person is being changed, the authorized representative of each Party shall notify the other Party in writing (email accepted).

13. ETHICS, FRAUD AND CORRUPTION

13.1   The Consultant shall comply with the principles and expected standards of conduct equivalent to those stipulated in Section 4 of the Code of Conduct and Professional Ethics for the Secretariat, available at https://www.iucn.org/downloads/code_of_conduct_and_professional_ethics.pdf,   which   by   signing   this Agreement, the Consultant confirms it has reviewed and accepted.

13.2   The Consultant shall take all necessary measures to prevent any situation where the impartial and objective implementation of the Agreement is compromised for reasons involving economic interest, political or national affinity, family or emotional ties or any other shared interest.

13.3   The Consultant represents and warrants that there are no potential or actual conflicts of interests in relation to the implementation of this Agreement. If, during the course of this Agreement, the Consultant becomes aware of facts which constitute or may give rise to a conflict of interest, the Consultant shall promptly inform the IUCN Contact Person in clause 12.1 in writing, without delay. The Consultant shall immediately take all the necessary steps to rectify this situation. IUCN reserves the right to verify that the measures taken are appropriate and may require additional measures to be taken within a specified deadline.

13.4   The Consultant shall take all necessary precautions to avoid fraud and corrupt practices in implementing this Agreement. The Consultant shall comply with the standards of conduct equivalent to those stipulated in IUCN's Anti-fraud Policy, available at https://www.iucn.org/downloads/anti_fraud_policy.pdf, which by signing this Agreement, the Consultant confirms it has reviewed and accepted.

13.5   The Consultant shall cooperate fully in any investigations linked to events under this clause which may be carried out by IUCN and/or the Donor and shall give access to all records (and to its staff if applicable) in the event that this is needed to support investigations of complaints of unethical behavior, fraud or corruption. IUCN reserves the right to take necessary legal action and/or terminate the Agreement in accordance with clause 16 if it determines that any fraud, corruption and/or unethical behaviour has occurred. Any repayment claim may also include interest, investment income or any other financial gain obtained as a result of the fraud.

14. NON-DISCRIMINATION AND POLICY ON THE PROTECTION FROM SEXUAL EXPLOITATION, SEXUAL ABUSE, AND SEXUAL HARASSMENT (SEAH POLICY)

14.1   IUCN recommends the Consultant to apply non-discriminatory practices in terms of benefits and remuneration for both men and women employees in the performance of this Agreement.

14.2   The Consultant will comply with the principles and standards of protection equivalent to those stipulated in the SEAH Policy available at https://www.iucn.org/sites/dev/files/seah_revised_version_2020apr27.pdf

15. PROCESSING OF PERSONAL DATA

15.1   Personal Data is any information relating to an identified or identifiable individual, unless otherwise defined under applicable law. The Parties commit themselves to respect applicable data protection laws and regulations and process Personal Data in accordance with the terms of this Agreement.

15.2   IUCN may share Personal Data of the Consultant and / or Consultant Key Personnel with the Donor and other IUCN partners strictly involved in the implementation of the Project. The Consultant will have the right of access its Personal Data and the right to rectify any such Personal Data held by IUCN. If the Consultant has any queries concerning the processing of Personal Data, it shall address them to IUCN using the online form located at (https://portals.iucn.org/dataprotection/requestform).

15.3   IUCN may in the course of performance of this Agreement provide the Consultant with Personal Data. The Consultant shall limit access and use of Personal Data to that strictly necessary for the performance of this Agreement and shall adopt all appropriate technical and organizational security measures necessary to preserve the strictest confidentiality and limit access to Personal Data.

15.4   Where the Consultant engages another processor for carrying out specific processing activities on behalf of IUCN, the same data protection obligations as set out in this Agreement and the applicable law shall be imposed on that other processor by way of an agreement. Where that other processor fails to fulfil its data protection obligations, the Consultant shall remain fully liable to IUCN for the performance of that other processor's obligations.

15.5   Where Personal Data is transferred to a country that has not been deemed to provide an adequate level of protection for Personal Data or to an International Organization within the meaning of Regulation (EU)

2016/679, the Consultant shall ensure that appropriate safeguards in accordance with applicable law are provided.

15.6   The Consultant shall promptly, and in any case within twenty-four (24) hours inform IUCN through the online form located at (https://portals.iucn.org/dataprotection/requestform), if it determines and/or discloses to a competent public authority and/or affected data subjects that a Personal Data breach has occurred.

16. TERMINATION

16.1 Termination for cause

16.1.1   IUCN reserves the right to terminate this Agreement in whole or in part, upon written notice with immediate effect in the event that the Consultant:

i.   has falsified or provided inaccurate, incomplete or misleading information in any documentation provided to IUCN;

ii.   defaults in carrying out any of its obligations under this Agreement;

iii.   has engaged in illegal acts, including, without limitation fraudulent or corrupt actions as defined in Code of Conduct and Professional Ethics for the Secretariat and IUCN's Anti-fraud Policy (hereafter referred to as a "Fraud");

iv.   enters into liquidation or dissolution other than for the purpose of an amalgamation or reconstruction; or

v.   ceases to carry on business, has a receiver or administrator appointed over all or any part of its assets or undertaking, enters into any composition or arrangement with its creditors or takes or suffers any similar action in consequence of a debt or other liability, or undergoes any process analogous to the foregoing in any jurisdiction throughout the world.

16.1.2   If it is determined that the Consultant has committed Fraud in competing for or in the performance of this Agreement, all expenditures incurred under this Agreement shall be undue and the Consultant shall promptly reimburse IUCN for all expenditures incurred in the performance of this Agreement.

16.2 Termination for lack of Donor funds

Not applicable.

16.3   Termination for force majeure

16.3.1   The performance of this Agreement by either Party is subject to acts of God, war, government regulations, epidemics, pandemics, disaster, strikes (excluding strikes of respective Parties' personnel), civil disorders, curtailment of transportation facilities, or other emergencies making it illegal or impossible for either Party to perform its obligations ("Force Majeure Event"). The Party subject to a Force Majeure Event shall promptly notify the other Party of the occurrence and particulars of such Force Majeure Event, including how it impacts the performance of its obligations under this Agreement. The Party so affected shall use diligent efforts to avoid or remove such causes of non or delayed performance as soon as is reasonably practicable.

16.3.2   This Agreement may be terminated unilaterally without compensation for any one or more of the foregoing reasons by written notice from one Party to the other.

16.3.3   Notwithstanding the above, the Parties may agree to a suspension or an extension of the Agreement as deemed appropriate. Upon termination of the Force Majeure Event, the performance of the suspended Services shall without delay recommence.

16.3.4   The Party subject to the Force Majeure Event shall not be liable to the other Party for any damages arising out of or relating to the suspension or termination of Services by reason of the occurrence of a Force Majeure Event, provided such Party complies with all the requirements under this clause 16.3.

16.4   Effects of Termination

In the event of termination under this clause, IUCN shall pay the Consultant any outstanding Remuneration in respect of Services performed by the Consultant up until the effective date of termination, it being understood that the total amount payable by IUCN to the Consultant shall not exceed the Remuneration stated in clause 5 of the Agreement. The Consultant shall within thirty (30) days of termination, and at IUCN's request:

16.4.1   to the extent possible, complete the Services subject to the Remuneration made available until the date of termination and stop all ongoing activities;

16.4.2   refund to IUCN any advance payments received in excess of the total expenditure incurred as evidenced in the invoices submitted to IUCN,

16.4.3   reimburse IUCN for any expenditures made in breach of the terms of this Agreement and

16.4.4   submit final technical and financial reports and any other materials, deliverables, works or other outputs created as at the date of termination under this Agreement.

17. APPLICABLE LAW AND DISPUTE RESOLUTION

17.1   The performance and interpretation of this Agreement will be subject exclusively to the laws of Switzerland, excluding its conflict of laws principles.

17.2   Any dispute arising out of or in relation with this Agreement that cannot be resolved amicably by the Parties or by way of mediation shall be submitted to the competent courts of Lausanne, Switzerland.

18. GENERAL PROVISIONS

18.1   This Agreement is the complete understanding between IUCN and the Consultant and replaces all other agreements and understandings in reference to the subject matter of this Agreement.

18.2   Any modification or amendment of this Agreement shall be in writing and shall become effective if and when signed by both Parties.

18.3   This Consultancy Agreement is non-exclusive. IUCN is free to consult other experts in the Consultant's field of specialization.

18.4   This Agreement is personal to IUCN and the Consultant, and neither Party may sell, assign or transfer any duties, rights or interests created under this Agreement without the prior written consent of the other.

18.5   Either Party waives all and any rights of set-off against any payments due hereunder and agrees to pay all sums due hereunder regardless of any set-off or cross claim.

18.6   All provisions that logically ought to survive termination of this Agreement shall survive.

This Agreement may be executed in counterparts, each of which shall be deemed to be an original, but all of

which, taken together, shall constitute one and the same agreement. The Parties agree that the signed

counterparts may be delivered by e-mail in a ".pdf" format data file or electronic signature (e.g., DocuSign or

similar electronic signature technology) and thereafter maintained in electronic form, and that in this case such

signature shall create a valid and binding obligation of the party executing with the same force and effect as if such ".pdf" or electronic signature page were an original thereof.

Signed on behalf of:

IUCN, International Union for Conservation of Nature and Natural Resources	**[full name of OTHER PARTY]**

Date: _____   Date: _____

[Name of representative]   [Name of representative]

[Position of representative]   [Position of representative]

ANNEXES

Annex 1 – RFP
Annex 2 – bidder's proposal
And additional annexes if applicable

PART 6 – DEFINITIONS

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

Contract	Means any contract or other legal commitment that results from this Request for Proposals.
Contractor	Means the entity that forms a Contract with IUCN for provision of the Requirement.
Instructions	Means the instructions and conditions set out in Part 1 of this Request for Proposals.
IUCN	Means IUCN, International Union for Conservation of Nature and Natural Resources.
IUCN Contact	Means the person IUCN has nominated to be used exclusively for contact regarding this Request for Proposals and the Contract.
Proposal	Means a written offer submitted in response to this Request for Proposals.
Proposer	Means an entity that submits, or is invited to submit, a Proposal in response to this Request for Proposals.
Requirement	Means the supply to be made by the Contractor to IUCN in accordance with Part 2 of the RfP.
RfP	Request for Proposals