

Attachment 1: Specification of Requirements

Background

IUCN is a Union made up of five constituents: Members, Commissions, National and Regional Committees, Councillors and Secretariat. By harnessing the collective power of these constituents, IUCN has achieved much in its 74-year history ranging from producing the world's most comprehensive data source on threatened species to being instrumental in establishing the Rio Conventions on biodiversity (CBD), climate change (UNFCCC) and desertification (UNCCD). World-class work continues today but both digitalisation and Covid are transforming the way we work.

So how can IUCN facilitate member connections and build communities of conservation specialists in our rapidly changing world?

IUCN will provide the IUCN member zone—an online community platform for all its constituents to nurture and create communities around the shared vision of a just world that values and conserves nature.

What will happen in the IUCN member zone?

The IUCN member zone will be a safe and trusted online environment where IUCN constituents can connect, collaborate, and create added value for each other. Below is an initial list of activities to engage users and make it worth returning regularly to the IUCN member zone:

- A user facing a tough conservation challenge, creates a discussion topic in a safe environment that results in multiple helpful comments from conservation experts across IUCN.
- A user watches a webinar in the IUCN member zone and joins a chat room with other conservation specialists to discuss the webinar. Or the user listens to an IUCN briefing on a funding opportunity and can connect with other interested parties to build a consortium and jointly develop a funding proposal.
- A user helps out a conservationist early in his/her career who is struggling with an issue that the user also faced early in his/her career.
- A user hosts his/her own online webinar and invites all IUCN constituents or a particular subset of them.
- A user can search among all IUCN constituents to find an expert or partner with particular conservation skills based in a specific country and can then connect, exchange ideas and updates with them.
- A user creates a private space with certain individuals from among IUCN constituents to share and edit documents for a funding proposal or a joint publication.
- A user consults with a subset of IUCN constituents to get their input on a new conservation policy or a draft motion to submit for vote at the World Conservation Congress.
- A user can access collections of publications and documents that have been curated for specific user needs.
- A user publishes a job opportunity at his/her organisation on the member zone's job board.

- Similarly IUCN can communicate with all constituents on the platform to, for example, promote its events and training courses to zone members who can remotely access the events and courses via the platform; or consult and gather input on IUCN strategic plans, policies, and other key documents.

Specification of requirements

IUCN will evaluate technical proposals with regards to each of the following criteria and their relative importance:

	Description	Information to provide	Relative weight
1	<p>Design and branding</p> <ul style="list-style-type: none"> • Customisable branding that allows both one overall branding for the platform (ie IUCN) along with the flexibility to add additional brands to certain sections/groups (e.g. of sponsors or of Commissions or of Members) but within a template showing IUCN's logo. • User friendly through intuitive navigation, and clear design. • The design must be mobile responsive. • Design must follow IUCN corporate visual design guidelines for a cohesive look and feel across all IUCN materials. 	<ul style="list-style-type: none"> • Screenshots or screen recordings of online community platforms whose branding was customised to the clients' brand along with pages within this overall brand that include sponsor brand or sub-brands. • How customisable is the design? (e.g. can we only choose colours and add a logo, or is it more customisable? If the latter, what technical support is provided as part of the standard set up services, and what is additional?) • Screenshots or screen recordings that demonstrate ease of use and navigation of the platform along with any supporting evidence for intuitive navigation (e.g. usability testing) if available. 	15%
2	<p>Accessibility</p> <ul style="list-style-type: none"> • Hosting services with accessibility and fast speed from all countries including countries with low bandwidth. If all IUCN constituents used the platform this would be 21,000 users. 	<ul style="list-style-type: none"> • A summary of the platform hosting services, data back-up and recovery plans that are offered. • The standard service level agreement for 	15%

	<ul style="list-style-type: none"> • Data back-up, recovery against unexpected system or human errors or disasters are required. • Multilingual: IUCN's official languages are English, Spanish and French. The platform must be available in the three languages. 	<p>hosting services, back-up and recovery.</p> <ul style="list-style-type: none"> • Explain your experience of providing an online community platform in multiple languages (front end only, the back end can be in only English). Providing examples. 	
3	<p>Integration with IUCN systems</p> <ul style="list-style-type: none"> • Single sign up: IUCN Secretariat can easily sign in with their IUCN user name and password, IUCN Members and Commission Members can sign in with their IUCN Union Portal user name and password. • Member directory: Members of the platform can search and find other members according to name, job title, organisation, location and expertise. This will require integration with IUCN's CRM system (CiviCRM). 	<ul style="list-style-type: none"> • How is the integration done (see also 11. User authentication)? • Provide an example of an integration with CiviCRM. • Any existing integrations? • Describe your platform's API 	15%
4	<p>Interactive member capabilities</p> <ul style="list-style-type: none"> • The features below need to be self-service. Easy for any platform member to set up along with the ability to find/invite/alert specific platform members to an activity according to name, organisation, geographic location, and expertise (see 3 Integration with IUCN systems): • Profile page for each platform member that is synced with IUCN's CRM and Commissions system and space for member to add further information on publications, photos, work, and projects. Profile pages also for IUCN Members, IUCN Commissions and Commission specialist groups. • Open and closed groups • Discussion forums (closed or open) • Individual chat and possibility to meet online on the platform via a video call • Online meeting rooms 	<ul style="list-style-type: none"> • Please identify which of the interactive member capabilities listed are standard on your platform, and which items would require further development. • Please list other interactive options that your platform offers as standard that you think could be potentially useful. 	15%

	<ul style="list-style-type: none"> • Posting content in multiple formats (images, audio, video, documents) and content curation • Mass communication to all platform members • Networking and matchmaking • Polling and voting • Hosting or participating in online video meetings or events either via the platform’s event functionality or an integration with a commonly used event system (e.g. Zoom). • Calendar of events taking place within the platform • Working together on a common document without the need of additional accounts/licenses for the platform members or an integration with a commonly used online document editor (e.g. Google Docs). • Email notifications of relevant postings within the platform and ability to manage your email alert preferences. • Consultations: Platform members can initiate a consultation on a document to all or selected platform members. Consultations can include asking multiple questions and answers can be downloaded in a user-friendly format. Consultations are possible either without the need of additional accounts/licenses for the platform members or an integration with a commonly used survey tool (e.g. Microsoft Forms). • Content library for publications (pdfs) and videos. Collections of content can be curated by administrators and content added by members 		
5	<p>Community user engagement</p> <ul style="list-style-type: none"> • Recognize top contributors • Contests • Gamification 	<ul style="list-style-type: none"> • Please identify which of the community user engagement capabilities listed are standard on your platform, and which items would require further development. 	10%

	<ul style="list-style-type: none"> • Notifications on the platform (e.g. like in upper right corner on LinkedIn) • Tagging other platform members • Social media threads 	<ul style="list-style-type: none"> • Please list other engagement options that your platform offers as standard that you think could be potentially useful. 	
6	<p>Administration and management</p> <ul style="list-style-type: none"> • User permissioning (restricting or enabling members to do certain things e.g. hosting a webinar or running a consultation) • Moderation • Statistics and analytics to monitor usage • Content management, publishing and governance 	<ul style="list-style-type: none"> • Please outline what functions are available to the platform's administrators to manage members and content. • Please provide an example of the statistics and analytics available to administrators to understand how members are using the platform and how this helps administrators improve the platform for members. 	10%
7	<p>Services and support to the client</p> <ul style="list-style-type: none"> • What services do you offer the client in the following: • Upgrades and maintenance • Integrations • Onboarding and training administrators • Technical support 	<ul style="list-style-type: none"> • Please describe the form of support provided to cover the items listed. Include the service levels and costs. 	10%
8	<p>Timeline</p> <ul style="list-style-type: none"> • Our target timeline is to have a pilot version by 20th December 2022 followed by a period of testing, training and content development for a launch to IUCN constituents in March 2023. 	<ul style="list-style-type: none"> • Please include details in your proposal concerning the project stages and timeline using 7th November 2022 as a start date. 	10%
TOTAL			100%

The following is not immediately required in the RfP but should be included as additional options in the Proposal with separate and severable lines in the proposed budget if it can be offered.

	Description	Information to provide
9	Mobile app version of the community platform	<ul style="list-style-type: none"> • Do you offer an app (iOS and Android) of the platform? • Does it include all the features of your web version? • Is the app available in the three IUCN languages (English, French and Spanish)? • Screenshots of the app and usage figures of the app for community platforms similar to this project.
10	Future integrations with IUCN systems	<ul style="list-style-type: none"> • Please elaborate on the integration capabilities of the platform with other systems as future but as yet undefined integration projects are foreseen including IUCN's website (Drupal), hybrid event platform (Cvent), online course platform (Opigno), and IUCN Union Portal (Drupal) that includes Members' financial information (dues status, invoices, receipts, payments by credit card and eligibility to vote).
11	User authentication	<ul style="list-style-type: none"> • If it's possible to allow users to authenticate using IUCN's Users Management API. IUCN's User Management API is developed with Drupal and provides tools for authentication, creating accounts, editing accounts, and resetting passwords. An additional webservice is available to retrieve user data from authenticated users using the token returned by the authentication web service for successful authentications.
12	Managing member payments	<ul style="list-style-type: none"> • Please explain the possibilities to collect IUCN membership fees via the platform. We would be interested in the ability to invoice IUCN Members their fees (Members pay a different fee according to certain criteria), for Members to pay the fee on the platform and receive/download receipts, and see a summary of the status of their payments with IUCN.