

	Topic	Question	Answer
1	Upgrade / relaunch / changes to information architecture	Do you want to upgrade your current website or relaunch the website?	The platform needs to be migrated to Drupal 8 or 9 and we would like to implement some major improvements and new features.
2		In Section 2.3. Is Information Architecture defined or can it be improved during the project?	The basic information architecture should remain as it is on the current platform, however minor changes and improvements are permissible and desirable; e.g. the classification of the content (solutions) will be improved, which concerns content tags and filters.
3		In section 2.9. REQ-12 The term <i>sub-sites</i> is used to describe sub-pages under the same domain OR as a new web application, each on its separate domain? Do you have an existing example on your current website that could show us the actual usage?	This refers to features such as the map or the review process, which might require external applications. Those should run under the same domain
4		- May we ask you to elaborate more on REQ-12 "It should be possible to create sub-sites which can inherit features, user lists, and content from the parent site." and REQ-13? Is the sub-site feature already available on the current website?	it's not a feature available on the site.
5		<u>Please confirm if the IUCN team will retain all or most of the content on https://panorama.solutions/fr/explorer during the redesign process.</u>	yes, all content (Solutions, news stories, resources) will be retained. Minor changes to structure and text of static pages is expected.
6		Which documents or artefacts can be made available for the elaborated information architecture, such as visualisation of page structures, user flow or taxonomy tables, etc.?	taxonomy tables, user stories, all required information on architecture of current site (some of which may change on new site)
7		REQ-12 und REQ-13: What does the term "subsites" mean?	Sub-pages under the same domain. This is about the Community pages, such as https://panorama.solutions/en/portal/panorama-species-conservation . They should have the same layout but different color palette, and might also include various content elements such as events etc.
8		REQ-40: What does the term "content-libraries" mean?	This means a media management tool like "media library".

9		REQ-40: What workflow is meant by "add content in bulk"?	Uploading multiple media files to the library, in a bulk. This is a standard feature.
10		2) Re. chapter " 2.6 Structure and Information Architecture ": are these deliverables to be produced by the vendor or they will be provided by IUCN at the start of the contract?	they will be provided by IUCN at the start of the contract
11	design / visual ID	The document seems to indicate different levels of design requirements in different sections. Does the site require us to take what's currently there and modernise it slightly, completely redesign it or apply a design which will be supplied to us? Do you require us to supply a design concept as part of the proposal, or at the interview stage or only once the project is underway. Although a design can be helpful to show a route we might take, it can also hinder the review process as we usually take another route after having meetings with you and your team.	The corporate design (logo, color palette,) will stay the same. We do not require an actual redesign of the site and no major changes to the information architecture, the basic "look and feel" should remain the same. As such, we are not expecting a detailed design concept as part of the proposal or at the interview stage. Any tweaks to the current design, as well as design and placement of new features on the site, can be discussed and agreed during project implementation stage.
12		In Section 2.3. What is the level of detail for Information Architecture and Visual Design that you will provide? Are branding guidelines web application specific?	The current web platform is the basis for the information architecture and visual ID of the new platform. We can provide all information about the current platform that is required, liaising closely with the current service provider as needed. The branding guidelines concern the entire PANORAMA initiative, i.e. are not specific to the web platform.
13		In Section 2.7. You stated: " <i>Following the branding guidelines, design a new look-and-feel</i> " but then in next sentences you stated in the same section: " <i>No complete redesign is expected. Instead, the bidder should build on the existing design.</i> " Can you elaborate which of the following is expected - new design, or build upon existing design?	Build upon desisting design
14		If you're planning to relaunch, will it be the same design?	Yes, the corporate design (logo, color palette,) will stay the same. We do not require an actual redesign of the site and no major changes to the information architecture, the basic "look and feel" should remain the same.

15		- Is a brand book (with guidelines) available for the visual design phase?	yes, there are general brand guidelines for the PANORAMA initiative.
16		Are there guidelines or design system documentation for the design to be adopted?	see above
17		1) Re. design deliverables : In chapter 2.7 of the ToR it is specified that "The proposer will develop a graphic concept and the visual language of the new templates" and "No complete redesign is expected. Instead, the bidder should build on the existing design". At the same time, in chapter 2.3 it is said that: - "Development of the website based on the Information Architecture and Design provided by IUCN and partners" and - "Note that Information Architecture and Visual Design material will be provided", but it's not clear whether the latter statement refers to IUCN or the vendor. Could you please clarify if: a) IUCN will provide any design materials (e.g. wireframes or a detailed design proposal) and, if so, a brief description of those deliverables b) the design of the new website is going to be just an improved version of the current website or a completely different look and feel	see above
18	CMS / systems	Regarding the CMS and development , how keen are you from moving away from your CMS to another one? Are there aspects of Drupal you do or don't like. Are there elements of a CMS that would be of benefit?	We ideally wish to remain with Drupal, upgrading from Drupal 7 to Drupal 8 or 9. We like that Drupal has an easy-to-use, intuitive backend, given that the site has a large number of administrators, working across different institutions, along with the other advantages of using a widespread open-source CMS. However, it is essential that the proposals present a concept for automated migration of content from the current platform. If we do not receive proposals that can offer this (i.e. migration would be handled manually or in a customized manner), then we would also consider proposals based on other Open Source CMS, such as WordPress or Typo3.

19		If you're planning to relaunch, do you want to host it with same technologies or do you have a tech-stack in mind?	We would ideally like to stay with Drupal (see above), upgrading to Drupal 8 or 9. Most likely it will be necessary to develop a customized map module. We would prefer to integrate an external text collaboration service for the process of reviewing solutions (=user generated content). External services could potentially also be used for the "surveys" feature.
20		Could you please share the number of systems with which integration is required.	See above
21		Please confirm the form of data export available from your current CMS Set up.	A data export is either possible via the database itself, or Drupal approaches are used to migrate the data from the current system (Drupal 7) to the new System (Drupal 9). The presentation of a suitable approach should be part of the offer
22		- Is Bootstrap framework a requirement for the new website development?	no
23		There are a lot of mentions about Drupal and specifically updating to Drupal 9 or 10 is mentioned as a solution as well as requirements for Drupal hosting. Are you locked in on Drupal as the preferred CMS or are you open to other open source systems like WordPress?	We are not locked in, but we have a strong preference for staying with Drupal (see above)
24	users / roles	The site has a front-end login . Can members of the public access the site and if so, what can they do once registered?	Yes, any member of the public can create a user account on the site. Once they are registered, they have the role of "solution provider", which means they can create solutions (=user generated content), comment on other users' solutions and create an uptake story. Another role are "reviewers" - registered users can be "upgraded" to this role by an admin. They can then be invited by an admin to review a draft solution that another user has submitted.
25		In section 2.4. What is the definition of an External user, and what are its requirements? Does he need to register/login, submit content, and interact with other users?	Yes, all of the above. "External users" includes both non-registered and registered users of the platform. Registration is required to submit user generated content (e.g. Solutions).

26		<p>In section 2.4. What is the difference between <i>Solution or Uptake story providers</i> and <i>Collaboration partners</i>?</p>	<p>Solution or Uptake story providers are users of the platform who create user generated content (e.g. Solutions). They are typically practitioners who implement projects in the nature conservation and sustainable development field, and then publish Solution case studies about their projects on PANORAMA. Collaboration partners are other institutions, web resources and initiatives which have similar aims as PANORAMA, and with whom PANORAMA collaborates actively (see also "Collaborators" page on current platform). One key objective of the redesign is to enable interoperability with other priority peer web platforms (i.e. some of the "collaborators").</p>
27		<p>In section 2.5. How many users in the role of <i>Solution / uptake story provider</i> do you expect to have?</p>	<p>There is no upper limit to the number of solutions and solution providers/uptake story providers. We currently have close to 900 solution providers. The new platform should cater for at least 3,000 registered solution providers. Side note: The "uptake stories" feature and associated user role of "uptake story provider" is being reconsidered and might not exist on the new platform.</p>
28		<p>In section 2.5. Can you elaborate what is the definition of an <i>Solution / uptake story provider</i> and what are their requirements? How should they submit their posts? Should they have an account? If yes, what would be their role?</p>	<p>Solution providers are practitioners who implement nature conservation and sustainable development projects. They need to register on the platform and can then create a draft Solution case study. After review, this case study gets published and is visibly linked to the solution provider's user account, i.e. it is published under the solution provider's name. Solution providers can revise or unpublish their solution at any time after it has been published, by logging into their user account.</p>

29	In section 2.9. REQ-43 - REQ-61 (Profiles) Which of the following profiles and functions do you have on your current website? It is a bit confusing because the definition of <i>user</i> in REQ 43 - 61 is not explained in regards to Section 3.1. (User roles), so if you can define the type of user that are mentioned in REQ-43 - REQ-61?	On the current website, we have profiles for users (external) and site administrators (internal, i.e. staff of any of the PANORAMA partner organizations). This will remain the same on the new platform. A "user" is anyone external who wishes to use the website, whether it is for submitting a solution, uptake story, reviewing a solution, or simply browsing. Administrators are those colleagues administering the backend of the platform - either the entire platform, or just a specific component of it (=a portal/Community).
30	In section 2.9. REQ-68 Can you explain what the term <i>nominate</i> exactly means?	We mean "appoint" other members, i.e. assign them the role of group owners, with associated rights.
31	Please suggest the number of concurrent users who will use this application.	We are not clear what is meant with this question. If this refers to the number of visitors expected to use the web platform at the same time: We currently have around 5,000 visits per week.
32	Kindly let us know the number of users of the CMS system	Currently, there are around 2,000 registered users on the platform. This number is expected to grow continuously.
33	It should be possible to create profiles for solutions associated to organisations. This would be hierarchical with one to many, one organisation to many solutions. Can you elaborate on " create profiles for solutions associated to organisations"	This is perhaps misleadingly worded. Organisations that are registered on the platform (because they have submitted 1 or several solutions) have their own profile pages. Each solution has its own page, i.e. its description. All solutions that are associated with 1 organisation (meaning the solution has either been submitted by that organisation, or the organisation has been listed as a partner in that solution) should appear on that organisation's profile page.
34	Are there user stories behind the requirements - once to understand them better and to prioritise them in development?	Yes, we have developed user personas, with associated background information, e.g. needs, pains, gains. This information can be provided at implementation stage.
35	REQ-62: What are "certain site permission for registered user" in relation to the the user types contributing user, collaboratin user, and internal user?	An example is the role of reviewer, which comes with certain permissions. Administrators should be able to assign the role of reviewer to registered users.

36	<p>Solution review process</p>	<p>In section 2.9. REQ-42 Can you elaborate this request a bit more? What do you refer to as external functionality?</p>	<p>Each draft Solution case study undergoes a review process (quality check) before it is being published on the platform. Currently, the entire solution submission-review-revision-publishing process takes place on the web platform, and the review process has been custom built. For the new platform, we envision the use of an external text collaboration service for this Solution review process.</p>
37		<p>Please elaborate on the changes that you are looking for in the feedback form & Solution Review process (forms & backend).</p>	<p>The feedback form should make use of an external service provider and it should be possible to easily aggregate and evaluate responses.</p>
38		<p>Please share your elaborate in the reviewer management system and its specifications.</p>	<p>A registered solution provider submits a draft solution through a standard online entry template, to one of the Communities of PANORAMA (e.g. PANORAMA Cities). The administrator of that Community then gets notified. The administrator will assign a reviewer to that solution, or decide to review the solution themselves. The review includes making comments on each of the sections of the solution, and also making direct text changes. Once the review is concluded, the reviewer's feedback needs to be shared with the solution provider. The solution provider revises the text of the solution according to the feedback and re-submits. Once the solution meets the quality standards of PANORAMA (= the reviewer is satisfied with the quality of the solution), the administrator will publish the solution. This entire process should take place through the platform.</p>
39		<p>The site should have functionality that enables users to content via a formular to the website and then be reviewed by other members.? Can you elaborate?</p>	<p>see above, this refers to the solution review process</p>
40		<p>The site should have external functionality that offers reviewers a text collaboration with the content providers? Can you elaborate?</p>	<p>see above, this refers to the solution review process</p>

41		- May we ask you to elaborate more on the REQ-42 "The site should have external functionality that offers reviewers a text collaboration with the content providers."?	see above, this refers to the solution review process
42		What do you mean by "external functionality"? Can you deepen the expectation about "text collaboration"?	There are external tools available that allow for easy text collaboration (in this case: joint work on the text of the solution description, between the solution provider and the reviewer), and that can be integrated into websites (in this case the PANORAMA platform). See above for further details on the review process.
43		3.7.9 Review Prozess: What other requirements / features are there in the review process apart from the change of individual states?	see above
44	Training	In section 2.9. REQ-76 Can we provide general guidelines and online materials that we use with all our clients, and materials specific depending on Panorama functions, or do all materials have to be Panorama specific (branding of general guidelines for the entire Panorama project)?	You can use general guidelines and just adapt them where needed. They don't need to follow PANORAMA branding, since these materials are only meant for internal use (i.e. for all colleagues inside the PANORAMA partnership who work with the platform as administrators), not for external communications.
45		What is the Location, Duration and expected number of participants in post implementation trainings. Do we need to budget for the venue and refreshments for these in our financial proposal or would it be provided by the client?	These will be virtual trainings, at least 2 sessions. Duration will depend on complexity of the admin backend. We expect around 2-3 hours per session; 10-20 participants per session.
46	Map explorer	In section 3.7.2 Map Explorer You wrote that <u>Map Explorer is a "... feature that does already exist on the website..."</u> . But when we press the link it goes to some other external site https://www.sportanddev.org/en/connect/ Can you send us the link that points to the existing panorama map that you're referring to.	Apologies, here is the correct link: https://panorama.solutions/en/explorer/map
47		In section 3.7.2 Map Explorer Can you elaborate what does <i>Additional search and filtering abilities</i> mean for Map Explorer in terms of functionality?	This can be discussed and defined in more detail during implementation stage, but we envision e.g. that users can filter the solutions (e.g. by ecosystem) directly on the map. In the current map explorer, the filters are displayed above the actual map.

48		Which data should be exported in which format(s)?	All information displayed on the Solution page in an open and structured format, f.e. .csv
49		What does the term "data layers" mean?	This refers to area data or geometries that are placed on the base map.
50		What does the feature "Custom queries of pre-calculated data" mean?	the option to create the own custom database query
51		Does the feature listing "reports and embed tables, charts, graphs and other data visualisations" refer to the preview display of a solution?	This refers to the map explorer, based on information from the solutions.
52		Can this feature list be broken down and prioritised in detail for use in the map?	The scope of this question goes beyond what we are able to clarify in this pre-contract stage.
53		Which data for the charts, graphs and other data visualisations should be visualised?	Data from the solutions
54	Budget / proposal requirements and contracting process	Are there any financial (budgetary) restrictions or limitations that we should be aware of?	The maximum available budget is 100,000 CHF.
55		Please could you let us know if there is a defined budget for this project.	see above
56		Please provide the payment milestones wrt deliverables of the project.	please see p. 38 of the RfP (contract template)
57		In pre-qualification criteria, given on page no. 2, section 4, Our understanding is in company letterhead we need to provide name of the employees of our organisation who are qualified for this project only.	correct
58		Please could you let us know whether any taxes would be deducted while making payments to the international firms? However, if there is VAT and other applicable indirect taxes or any direct taxes – then what percentage the international firms need to add in their pricing proposal for such taxes?	IUCN is VAT exempt in Switzerland. Please quote your prices without VAT.
59		Could you let us know what the budget is for this project?	see above

60	Could you let us know if you have a local preference or are you open to any agency that has done similar work with clients globally?	Yes, we are principally open to agencies based anywhere in the world, provided they can ensure timely service particularly in case of urgent issues (e.g. website malfunctions) in spite of time zone differences.
61	3 relevant references of clients similar to IUCN / similar work. - Do we need to provide the names of the Customers or only SOW with the masked confidential and commercial information is sufficient?	Names of the customers would be desirable, but of course you are not required to share confidential client information.
62	Confirm that you have all the necessary legal registrations to perform the work - Is there a specific set of legal documents that we need to possess, as we have dual shore operations	nothing specific
63	State your annual turnover for each of the past 3 years- Does this need to be part of the proposal or can this be shared in an email between IUCN and our finance team, if yes please help us with the email address?	This should normally be part of the proposal.
64	How many employees does your organization have who are qualified for this work? - Do you need our team strength, or specific to the tech stack that we are proposing as part of the proposal, also do you have any preference in terms of the technology stack to be used...?	Ideal would be if you could indicate the total number of employees of your companies, as well as the number of staff that will be directly involved in implementing the project.
65	Consultancy Agreement Draft provided with the RFP - If we happen to win the RFP, would IUCN be open to negotiating the terms of the sample consultancy agreement as there are a few onerous sections in the Agreement?	Yes, we are principally open to discussing adjustments. This would then need to be seen with our legal team.
66	Re. criteria #6 for evaluating the technical proposal: Website of the proposer (5%) - This criterion is quite uncommon and we kindly suggest removing it, as it's not directly related to the project scope and objective. If that is not possible, please detail what are the minimum requirements to be met by a vendor's website in order to achieve the maximum score.	This criterion typically forms part of RfPs issued by IUCN for website development projects, but as you note, the weighting relative to other criteria is low. It will contribute to assessing the overall suitability of the vendor to the project, e.g. additional background information on the vendor's capacity, prior experience etc, which does not form part of the proposal, can be assessed from the website.

67		Is it acceptable that our financial proposal is made in Euro or USD instead of Swiss Francs? If not possible, our price would likely include some provisions for bank fees and exchange rate risks.	In order for IUCN to be able to compare different proposals we received, all need to be submitted in the same currency - thus we kindly request you to prepare your proposal in CHF.
68	Architecture of current site / migration / content	Please could you let us know the number of web pages on your site currently?	The site is built on a CMS, so there are no "web pages". Currently, there is a total of 10.212 Drupal nodes. These include various content types like Solutions, Building Blocks, Organization Profiles. There is a total of 12 different content types.
69		Our understanding is selected consultant will migrate all current pages and add on pages to the new site. Please confirm.	Yes, migrate all current pages. Adding new pages is likely, but dependent on exact concept for new functionalities.
70		Please share the estimated volume and format of data to be migrated.	About 10.000 nodes, 2.000 user accounts, 3.000 Taxonomy terms. Keep in mind, that content nodes are often related to each other (solutions for example reference one or more building blocks), and all content types are build on various fields. Solutions for example are build using more than 60 fields. For most content types and taxonomy terms there can basically be translations in english, spanish and french
71		In regards to migration, please clarify how many different page layouts do you have on your current site?	As the site is build on a Content Management System, the question is rather difficult to answer. Each content type (the 12 mentioned above) has its own template. Furthermore, there are various view modes for content types as they are dynamically rendered in various contexts (basically using views, references or custom code). You can get a good overview on public part of the page itself.
72		Please confirm whether you anticipate the firm creating content for the redesigned website.	no. Only migration of existing content. Any new content will be provided by IUCN.

73		Can a test access / stage system to the current Panorama platform be provided?	Any member of the public, including interested bidders, can create a user account on the platform. Access to the code can be provided, once the vendor has been selected and contracted (during project implementation stage).
74	Hosting / maintenance	We assume that we will only assist to host the application on the hosting environment provided by client. Please confirm.	The hosting is also to be taken over by the contractor
75		Please could you let us know the duration of the post-launch support/maintenance period that should be included in the proposal.	Annual, but budgeted separately (see p.5); 1 month hosting to be included in core budget (see p.21)
76		Please share the current web hosting architecture.	On server side: The current production server implements a classic LAMP stack (Linux, Apache, MySQL, PHP). PHP is currently locked to PHP 7.3 as the site in its current state is not compatible with PHP 8+. There is one feature that uses AWS Lambda - this feature fetches the current Twitter Feed which is shown on the landing page of the portal. The code for this feature is of rather low complexity.
77		- Do you have any traffic metrics allowing us to select a proper tier for a web hosting solution?	See here: https://panorama.solutions/en/news/2022-website-statistics
78		4) Re. hosting requirements, chapter 2.9, REQ-79: " The supplier should offer maintenance services which includes module upgrades, security patch updates, and ongoing site monitoring until the launch of the website " - Does this requirement refer to hosting and maintenance services for the current website? Or to the new version of the website, during development, but before the official launch?	new version of the website
79	New features	The site should have functionality to host surveys and provide results and analysis to site managers? Can you brief on what type of survey you are referring to?	The surveys are simple and comparable to Gforms in terms of forms. In the backend, for example, information on receipts is to be visualised.

80	- REQ-30 "Users should have the option to sign up to a newsletter that is sent to personal email addresses for specific categories and organisations updates." How are you going to collect subscriptions and send out newsletters?	"subscribe" button on web platform. We also have an existing list of around 6,000 subscribers which we will continue to use. These are stored on a separate system, i.e. IUCN's contact management system. Newsletters are sent out through that system as well, i.e. not through the PANORAMA web platform.
81	Are you considering a dedicated/reliable commercial solution such as Mailchimp or Sendinblue?	No, we would likely continue to use IUCN's newsletter/contact management system.
82	Which newsletter system should be integrated, for example Cleverreach?	see above
83	5) Newsletter (REQ-30 and chapter 3.7.8): Is there a newsletter already in the current website? If yes, could you please provide a short description? (e.g. is there an external tool which delivers the newsletters?)	Yes - there is a comprehensive semi-annual newsletter, and a brief monthly email update. All sent through IUCN's newsletter system, where also the PANORAMA subscriber list is stored (see above). Examples: https://panorama.solutions/en/news/semi-annual-newsletter-panorama-2022-review-and-2023-outlook ; https://civicrm.iucn.org/civicrm/ mailing/view?reset=1&id=8850&cid=1078&cs=11ace0ef57b9bc2c7837cab32a85b78a_1670317285_168
84	- May we ask you to elaborate more on REQ-61 "Partner Organisations should be able to create public and private groups for collaboration with other members."? What do you mean by groups? Is such a feature already available on the current website?	Users can be assigned to organisations and organisations can be assigned to communities. The organisations should be able to collaborate with each other in so-called groups.
85	REQ-61: What features are meant by "collaboration"?	tbd in more detail
86	REQ-61 und REQ-68: How do public and private groups define themselves in relation to the roles of external, internal and collaboration partners?	Groups are "spaces" on the platform. Collaboration partners are simply organizations, websites, networks to which the PANORAMA initiative is connected (see here: https://panorama.solutions/en/collaborators)

87		REQ-48: Can the requirements for messages be defined more precisely in technical terms, because the possibilities range from e-mail notifications to chat systems with live push messages?	The technical system is not explained in detail, the contractor can make suggestions here. Real-time communication is not required.
88		In section 2.9. REQ-66 Can you elaborate more on this request? What type of messaging are we talking about - One-way, two-way? Inside the CMS admin or some other type of interface. Do you currently have this feature?	We currently have a feature whereby site administrators can send an email message, via the platform, to all users of the platform, or a subset of users. Users also receive automatic email notifications from the platform, e.g. when a Solution they have submitted has been published. We wish to maintain this feature in a similar manner on the new platform.
89		3) Re. chapter 2.8, and in particular about the PANORAMA API: - Is this API implemented also in Drupal, or in some other framework? - Must the API remain backwards compatible in the new website (i.e. identical methods, parameters and identifiers)? Or small adjustments are acceptable (especially when it comes to the values used for filtering), assuming the documentation is updated accordingly?	The current API is implemented in Drupal. Small adjustments are acceptable.
90		REQ-64: Which data should be exported in which format(s)?	All information displayed on the Solution page in an open and structured format, f.e. .csv
91	Open data requi	Is there a specific Open Data standard that should be taken into account?	No, The definition of Open Data is based on https://opendefinition.org/
92		Is there a specific metadata standard that should be considered?	no
93		Are there examples of engagement with Open Data that reflect the use in the project?	We are not entirely clear on the question. All solutions published on the web platform are open data.
94		It should be possible for users to chose how they want to license their content (CC-License / Open Data-License)? What types of content you are referring to?	Solutions submitted by a particular user

95	miscellaneous	Is there anything else not covered in the RFP that would help us in winning this project and delivering something amazing for you?	Please see section 4.4. of the RfP: Furthermore, “additional services” will be considered but are not part of the evaluation criteria: 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.
96		In section 2.9. REQ-14 and REQ-71 The requests are not MoSCoW rated, can you provide the rating?	For REQ-14: S (to clarify: a system for reviewing solutions is "must have" - M, but it might be an option that this is directly integrated into the platform itself, rather than making use of an external service. However, we have a preference for integration of an external service); for REQ-71: M
97		We believe that all the technical documents will be provided to us in English language. Please confirm	yes