Specification of Requirements/Terms of Reference

Preamble

The International Union for Conservation of Nature (IUCN) is seeking to completely rebuild the Red List's Species Information Service (SIS). The SIS is a critical database and application used to store and manage species assessments for publication on the IUCN Red List website. As the current system is outdated, the IUCN aims to develop a new tool that retains all current features while incorporating advanced UI/UX enhancements to meet modern standards and user expectations.

Therefore, the IUCN wishes to award a consultancy contract to an experienced UI/UX agency to develop a UI/UX strategy and redesign for this application, in a way that facilitates user tasks and streamlines the assessment review and publication process. The UI/UX architecture should improve user experience, allowing both consistency across the various parts of the website while maintaining enough flexibility to allow future developments.

The Contractor will be required to work according to the detailed Terms of Reference contained in the following sections. The Contractor must uphold high standards of professionalism in its work and interactions with IUCN internal and external stakeholders, including IUCN leadership.

Background

The International Union for Conservation of Nature is the global authority on the status of the natural world and the measures needed to safeguard it. Embedded in our mission is the mandate to assess and report on the condition of animal species worldwide, which we accomplish through the IUCN Red List of Threatened Species™. Central to this effort is the Species Information Service (SIS), a robust but aging system that facilitates the assessment and management of species data.

Originally developed over a decade ago, the SIS has been instrumental in supporting the IUCN Red List's goal of providing information and analyses on the status, trends, and threats to species to inform conservation decisions. However, technology and user expectations have evolved significantly since its inception. The existing system, while comprehensive, is outdated in both its technological framework and its user interface design, which impacts the efficiency and user experience of the conservationists, researchers, and administrators who interact with it.

Recognizing these challenges, the IUCN is committed to modernizing the SIS by developing a new application that not only improves upon current functionality but also revolutionizes the user experience. This new system will incorporate all the reliable features of the current system, integrate advanced UI/UX enhancements to meet modern usability standards, and introduce new functionalities that address emerging needs in species assessments.

This Request for Proposals (RfP) aims to identify a skilled UI/UX consultancy firm that can partner with IUCN to undertake this critical task. The project will be carried out in two phases: the first focusing on developing a comprehensive UI/UX strategy, and the second on supporting the implementation of this strategy through the system development life cycle.

The UI/UX redesign of the SIS is not just a technical upgrade but a step towards enhancing global efforts in biodiversity conservation. The new system will play a crucial role in streamlining processes and improving the accessibility and effectiveness of the IUCN Red List, thereby helping to shape conservation policies and actions around the world.

Scope of Work and Activities

It is essential to clearly define the application's concept before starting development. While there is room for refinement during the latter development phases, the fundamental structure of the application should be established at this stage. The chosen consultancy must therefore implement a thorough UI/UX strategy, which includes the following activities, to be implemented in partnership with IUCN teams:

Stakeholder Consultations

Conduct extensive consultations with key stakeholders involved in the use of the SIS, including conservationists, researchers, and administrative personnel. These sessions are crucial for identifying specific needs, expectations, and potential improvements from a diverse range of user perspectives. While consultations could be undertaken remotely/hybrid, we think they may—at times—be more effective in-person. We expect at least two in-person meetings and sessions with the Red List Unit and the IUCN team. One in the beginning of the process and one to present the outcome of the project.

Workshops Facilitation

Facilitate interactive workshops aimed at brainstorming, idea refinement, and alignment of the project objectives with user needs and organizational goals. These workshops will help in mapping out the requirements and the expected outcomes of the UI/UX redesign. We expect one workshop in the second month of the process and another one when a draft version of the project is ready, at least one month before the end of the contract. The Contractor should be responsible for all travel expenses to these workshops that will take place in Cambridge. IUCN will be responsible for all the workshops' expenses and other participants travel.

Define User Personas

Develop detailed user personas representing the different types of system users. This will involve analysing user behaviours, needs, and goals based on the data collected during stakeholder consultations. Personas will guide the design process and ensure that the system meets the varied needs of its users.

Scenario Mapping

Create detailed scenario maps to outline typical user interactions with the system. Scenario mapping will help in visualizing the specific tasks that users perform, their decision points, and the interactions that need to be supported by the new system.

User Journey Maps

Develop user journey maps that illustrate the path taken by users through the system, highlighting critical touchpoints, pain points, and opportunities for enhancing user experience. These maps will aid in understanding the user flow and the necessary design interventions.

Information Architecture Definition

Redefine the information architecture of the SIS to ensure that it is logical, user-friendly, and facilitates easy access to information. This will include organizing, structuring, and labelling content in ways that support usability and findability.

Wireframing and Prototyping

Produce detailed wireframes and prototypes of the new system design. These will be instrumental in visualizing the structural layout and interactive elements of the system before full-scale development begins.

Style Guide Development

Develop a comprehensive style guide that outlines the design standards, branding guidelines, typography, colour schemes, and other elements of visual design. The style guide will ensure consistency throughout the system's interface.

Mock-ups

Create high-fidelity mock-ups that provide a realistic preview of what the final application will look like. These mock-ups will be used for internal reviews and stakeholder presentations.

Design Validation

Validate the design with stakeholders through multiple review cycles to ensure it meets all user requirements and quality standards. This step involves collecting feedback on the mock-ups and prototypes and making necessary adjustments.

Handoff to Development

Once the designs are finalized and validated, prepare and hand over detailed design specifications along with all assets to the development team. This handoff must include all necessary documentation to ensure a smooth transition from design to development.

Final deliverables

The consultancy will be required to collaborate closely with IUCN's project management and IT teams throughout these activities to ensure that the project remains aligned with organizational goals and technology standards.

The final deliverables should include:

- A summary report of strategic directions, information architecture, a style guide and guidelines for development

- A summary report of workshops and stakeholder consultations

- User journey maps and a sitemap

- Wireframes and mock-ups of all key pages

Requirements

The IUCN has done an initial analysis of the current application architecture and has developed preliminary ideas for regrouping and re-structuring SIS. The overall goal is to develop a new system that is easy to use, saves time for assessors and Red List Unit team members and allows a smooth and frequent publication process. The Contractor will be responsible for applying its professional experience to challenge and augment these concepts. The IUCN will assess the Contractor's added value based on how well it applies the below requirements to the work provided as outlined in the Scope of Work.

Along with the system requirements detailed in the table below, the Contractor should note that, as an international organisation, the IUCN operates in multiple languages: English, French, Spanish and Portuguese. The application should have the functionality to allow users to select their preferred language and for it to apply to the various UI/UX elements described below.

In addition to SIS, there are several similar systems designed for global and national Red Lists (e.g. sRedList, RAMAS Red List, and national databases used by SANBI, CNCFlora etc.) The Contractor may consider investigating how these other platforms handle analogous data to inform design and workflow decisions for a new implementation of the SIS.

ID	Requirement	Description
1	Browser Compatibility	Ensure compatibility with modern web browsers including Mozilla Firefox, Google Chrome, Apple Safari.
2	User Account and Permissions	Design personalized user interfaces for account management with specific permissions for editing, viewing, and managing assessments and taxa. Include secure login and password management interfaces.
3	Taxon Management UI	User interfaces for searching taxa by name or through a taxonomic tree, and for managing taxonomic information including synonyms, common names, and taxonomic notes.
4	Assessment Editing UI	Interfaces for creating and editing assessments, including tools for managing comprehensive fields such as geographic range, population, threats, and Red List Criteria and Green Status Calculator. Support for adding attachments to assessments is essential.
5	Photograph Support	Functionality for uploading individual photographs to species or bulk uploading photographs to many species. This will necessitate the management of photograph metadata and permissions (e.g. how the photos can be used in terms of licensing)
6	Working Sets UI	Design interfaces for creating and managing working sets to organize taxa and assessments. Include options for adding or removing taxa, subscribing to existing sets, and managing permissions for collaborative work. Simple dashboards for tracking the status of working sets.
7	Data Entry and Management UI	Interfaces for data entry and management. Tools for importing and exporting data should be easy to access and use. Particular attention should be paid to developing a robust reference management system.
8	Reporting UI	Interfaces to generate and manage reports from working sets or individual assessments in various formats.
9	Publication UI	Interfaces to send an assessment to a publication target (e.g. 2024-1) and for administrators to easily see what assessments are in the publication folder prior to publication. Simple dashboards for tracking the status of submitted assessments.

10	User Interface and Experience	Design a user-friendly interface that allows for easy navigation through the system's various functionalities. There should be options for administrators to customise view settings for different assessment types. Integrated training and help resources should be easily accessible for all users. A global search system should be easily accessible, allowing users to search by taxon, assessor, reviewer etc.
11	Workflow Management UI	Interfaces for activity logs, and undo and redo functionalities. Design a system to easily access historical versions of assessments.
12	Geospatial Data Management UI	Design interfaces for importing, exporting, visualizing, and editing geospatial datasets. Include functionalities for overlaying maps with other datasets and assessment data.
13	Security and Data Integrity Features	User interface elements that promote secure handling of sensitive information and data integrity, compliant with data protection regulations.
14	National/Regional Red Lists features	User interface should be flexible and adaptable to incorporate National and Regional Red Lists including multi-language features
15	Information Architecture	Assessment data held within the new SIS must be exportable as JSON so that it can be easily exported from the system for use on the Red List website and Red List API.
16	Conflict of Interest	Conflict of Interest declarations—which much be signed by assessors prior to submitting their data—should be handled by the new SIS as a form. Declarations are linked to user accounts within the system such that only conflict-free assessors can submit assessments.
17	Admin UI	This will contain top-level administrative functionality to control; adding/editing/deleting users, adding specialist groups, references, regions, adding tags, invasive species, CITES listed species etc. Ability for administrators to trigger data integrity checks and workflows. Administrators should be able to communicate to users via an internal (to SIS) bulletin board or via application notifications.

Preferred Competencies

The Contractor will have relevant experience in developing visual solutions for large, complex, multi-national and multi-lingual organisations, especially not for profit, government or other non-sales oriented websites. It should be able to understand the importance of the SIS within the IUCN. The Contractor should have experience providing and leading quality, engaging and effective workshops with diverse stakeholders, including with top leadership and other key audiences. It should have experience providing in-person and remote workshops as well as proven methods of soliciting, curating and prioritising stakeholder input through surveys, interviews or other means. The Contractor should have efficient means of cloud-based project management allowing convenient access for clients to track progress and provide input.

Duration

The IUCN will work with the Contractor to determine the duration of the assignment, but it should take around six months. The IUCN intends to move into the development phase of the project in March 2025. Therefore, the Contractor should provide near-final preliminary versions of all deliverables by the end of February 2025.

The final and curated deliverables must be made available latest by end of March 2025.

Evaluation Criteria

The technical proposal must address each of the criteria stated below explicitly and separately, quoting the relevant criteria reference number (left-hand column).

Ref	Evaluation criteria	Score	Weight	Maximum points (and threshold)
1	Approach and implementation plan	0-5	6	30
2	Quality of processes and systems to collect stakeholder information	0-5	4	20
3	Quality of methods and systems used to build the UI/UX part of a complex project	0-5	4	20
4	Experience as demonstrated by relevant portfolios of work of the supplier in handling projects of similar scope and size, including demonstrated	0-5	3	15
5	Sufficient, relevant and competent staff assigned to the work.	0-5	3	15
Total technical score				**100**

Proposers are required to submit the following details in their technical proposal:

1. Description of **approach and implementation plan**, including:

    a. The overall principles and UX/UI best practices the Proposer would apply to address the needs of this complicated website project

    b. Overall implementation plan for the project including timeline, interim deliverables or steps to facilitate the process and final deliverables

2. Description of proposed consultation **processes and systems** for facilitating strategic direction and engaging relevant stakeholders, including:

    a. Proposed process for identifying, refining and prioritising user personas

    b. Options for in-person and remote consultations and workshops

    c. Proposed process for combining and prioritising stakeholder input in line with overall strategic objectives

3. Description of the **methods and systems** used when designing and building complex UI/UX projects

    a. Proposed software for mockups/wireframes

4. Design **experience** for large, complex organisations. This must include:

    a. Links to a maximum of 3 examples of relevant website architecture work

b. Descriptions of each example including key strategic challenges and how the Proposer helped overcome them

c. Specific description of how, in similar past projects, the Proposer balanced user-based priorities, strategic objectives defined by management and communication priorities and provided information to organisation leaders to help them make strategic decisions

d. Website of the proposer

5. Description of the team proposed to work on this project including relevant experience and roles of each person (**staff competencies**)