



Request for Proposals (RfP)

CiviCRM & Drupal support master agreement

Attachement 1 Specification of Requirements

IUCN headquarters, Global Information Systems

RfP Reference: IUCN-24-08-P90145-1

Introduction and Context

The Union Applications Team at IUCN develops and maintains a group of web applications and digital systems to support the IUCN Secretariat on their tasks and to provide communication and interaction tools to IUCN's constituents – Member Organisations and expert Commission Members. A few examples:

- CiviCRM – our Constituent Relationship Management system. The source of truth for constituent data. This includes:
 - Name and contact details
 - Relationship to IUCN Constituent (Member Organisation or Commission)
 - Event attendance
- Union Portal – an extranet for all 20'000+ of our constituents to share documentation and information
- Commissions System – an extranet to manage commission memberships
- Membership Application Platform – a digital platform for organisations to apply for IUCN Membership

- NbS Self-Assessment Platform – a digital platform to perform self-assessments on Nature Based Solutions
- Accounts System – A centralised account and login system for the other platforms
- The Leader’s Forum website – a public event website including a registration form
- The IUCN Congress website – a public event website including event management features

All these applications are built with Drupal and depend on and integrate with the CRM (CiviCRM).

As such, our team is looking for a CiviCRM and Drupal expert partner to assist us with the development and maintenance of these applications.

Scope of work

The scope of work considered in this master agreement includes, but is not limited to:

- Yearly maintenance and support for CiviCRM and Drupal platforms:
 - Drupal upgrades
 - CiviCRM upgrades
 - Bug fixing
- Evolution of CiviCRM and Drupal platforms:
 - Improvements: analyze and propose solutions to the known problems
 - New features: Help ideate and define solutions for new features that need to be implemented
 - Implement the agreed upon features or fixes:
 - Install / uninstall drupal modules
 - Update the backoffice configuration
 - Develop custom code to suit IUCN’s requirements
- Hosting of Drupal applications
- Server maintenance for internal IUCN servers hosting Drupal and CiviCRM platforms
 - Server and database upgrades

- Configuration tweaking
- Performance optimizations
- Server monitoring

The scope of work is expected to evolve as the internal and external needs evolve.

Output of the RfP

The goal of this RfP is to identify a suitable vendor for a long-term partnership with IUCN and the Union Applications Team. This RfP will not result in signing a single consultancy agreement with a specific scope, but rather it will serve to allow to signing multiple consultancy agreements, each with its specific scope, on a **per-need basis**.

Evaluation

Since this is an RfP for a master agreement and not for a specific project with a specific scope, the contenders will be evaluated on their track record of relevant competencies for the presented scope of work and expertise on the relevant technologies.

Contenders are expected to present the core team including relevant competencies and experiences.

Contenders are expected to demonstrate their ability to work with complex structures with multiple stakeholders like IUCN and with complex systems with hundreds of thousands records by presenting their record of working with similar clients / in similar situations.

Contenders are expected to present their preferred project management strategy, including collaboration tools and methodology, both for support and maintenance as well as a for development project.

IUCN reserves the right to request more information from the contenders including via a scheduled interview.