International Rescue Committee, Inc.

Request for Proposal for Program Data Platform System and Implementation Services

IRC Reference: ##288769##

Contents

1. Introduction

1.1. IRC Background

The International Rescue Committee (IRC) responds to the world's worst humanitarian crises and helps people to survive and rebuild their lives. Founded in 1933 at the request of Albert Einstein, the IRC offers lifesaving care and life-changing assistance to refugees forced to flee from war or disaster**.**

At work today in over 50 countries and in 22 U.S. cities, the IRC restores safety, dignity and hope to millions who are uprooted and struggling to endure. The IRC leads the way from harm to home**.**

Please see http://www.rescue.org/irc-a-glance for more information.

In 2014, the IRC and our partners:

- Helped 17.6 million people whose lives and livelihoods were shattered by conflict and disaster to survive, recover, and gain control of their future.
- Provided 16.1 million people with primary and reproductive health care
- Gave 3.3 million people access to clean drinking water and sanitation
- Vaccinated over 364,000 children under the age of one against disease
- Helped 331,448 women deliver healthy babies in IRC-supported clinics and hospitals
- Treated 104,096 children under the age of five for acute malnutrition.
- Provided schooling and educational opportunities to over 1 million girls and boys, and trained over 23,000 educators

- Provided counseling or cared for over 32,499 vulnerable children and provided skills training or access to financial services to another 10,917 young people
- Counseled and provided essential services to over 10,809 survivors of gender-based violence and educated and mobilized over 1,255,877 men, women and children to lead prevention efforts in their communities
- Created 1,531 village savings and loan associations (VSLAs) that benefited some 35,752 members in 8 countries
- Provided 18,338 farmers with agricultural or agribusiness training
- Provided job-related skills training (entrepreneurship, business and financial literacy, vocational training) to 18,417 people
- Provided legal assistance to 22,000 people through IRC-supported legal centers
- Through our Resettlement Support Center in Thailand, the IRC assisted over 14,488 refugees who departed from camps and cities in East Asia to enter United States and build new lives with help from the IRC and sister resettlement agencies
- In the United States, the IRC helped resettle some 10,922 newly arrived refugees other immigrants

Please see http://www.rescue.org/irc-fast-facts for more information.

1.2. Project Background

IRC has not historically been able to systematically measure organization-wide progress against objectives created during periodic strategic plans. At the field level, most projects are based on logical frameworks with measureable indicators, but typically the focus is on reporting to donors rather than improving project performance, and there is no system to automatically aggregate data to get a country, regional or organization-wide report of IRC performance.

IRC has developed a strategic plan to continue and accelerate efforts to improve the use of data to make evidence-based decisions. Examples of previous work include:

- A series of short user-friendly guides – the "Data Driven" series – published by the Research, Evaluation and Learning (REL) Unit in 2008 that remains relevant and valuable to this day, along with more standard guidelines on monitoring and evaluation
- From 2000 to 2007, the IRC Health Unit conducted a ground-breaking series of mortality surveys in the DR Congo that led to international publicity (and controversy), calling attention to the massive civilian death toll indirectly caused by conflict

Data are integral to how the IRC does business, from budget analysis to evaluating whether our interventions have saved lives. We are deluged with data – IRC-supported health facilities alone generate a combined 75,000,000 data elements annually – but there is currently no organization-wide information system to manage data and indicators and aggregate results automatically from projects through various organizational levels.

As part of a measurement strategy, IRC has identified improved use of evidence and data as a strategic organizational priority and has begun a multi-faceted approach in support of that priority. In FY15, (September 2014 to September 2015), key investments include:

1. Creation of an outcome and evidence framework and an associated library of core indicators
2. The "Monitoring for Action" initiative to provide tools and guidance to staff on the use of data for program management and address challenges to this around the themes of clarity, commitment, capacity, and culture
3. Program Data Platform: this will be a fundamental component of IRC's ability to measure progress against project and strategic outcomes
4. Analysis of indicator and financial data to develop cost-efficiency metrics
5. Hiring of regional measurement action coordinators

This RFP is issued to select the primary program data platform for IRC (#3).

1.2.1. Project Drivers

The following factors have been identified as drivers for the project:

- There is no systematic automatic tracking of organization-wide performance
- Various units have measurement initiatives underway, but there is no consistency nor linkage among them
- There are a wide range of data gathering tools in place, from paper forms to Excel/Word/Access to online tools such as ODK/onadata, KoboCat, Magpi, CommCare, Primero, and others.
- The quality of monitoring varies greatly from project to project and country to country
- There is a lack of commonality among outcomes and indicators across projects even within the same sector
- The IRC has no standard staffing structure to handle monitoring and evaluation (M&E) either across the organization or within country programs, nor any systematic way of providing monitoring support to field teams
- A culture of managers' insisting on receiving data, reviewing it, and providing feedback to staff does not exist consistently organization-wide

1.2.2. Potential Project Value

The values that IRC anticipates from the data platform project include:

- IRC will be able to measure the scale of our work with insight to trends over time from project to organizational level.
- Program delivery staff would be able to access and analyze data easily, reducing the time and effort spent by eliminating the additional burden of spreadsheet creation and consolidation
- Grants coordinators and business development staff would have immediate access to data from past projects for proposal development, and data for current projects would be available for reporting.
- A data platform that will reduce time spent entering and analyzing data
- Ability for the first time to track progress against strategic outcomes
- Country directors would be able to view data for individual projects or aggregated across projects at a glance, with the ability to view data from other countries for comparison
- Regional directors will be able to view summaries of program performance
- Technical advisors and technical unit directors will have access to all project data in their purview, enabling proactive follow-up and potential adjustments as necessary

- IRC will be able to measure and share quantitative summaries of progress toward our strategic objectives with the IRC Board
- IRC will be able to provide higher-quality and more consistent data to our donors and partners

1.3. IRC Footprint

1.3.1. Staffing and Mission

IRC currently employs approximately 12,000 staff in 42 countries across a variety of humanitarian response and longer-term development sectors. The IRC focuses on countries and regions who are in or near crisis. The list of countries where IRC operates can be found at:

In addition to country programs, the IRC has a cross-cutting Emergency Preparedness and Response Unit (EPRU), as well as six technical units that countries and the EPRU:

1. Governance and Rights
2. Health
3. Women's Protection and Empowerment
4. Economic Development
5. Child and Youth Protection and Development
6. Research, Evaluation, and Learning

The IRC is also one of the leading support agencies for the settlement of refugees in the United States and maintains offices in 22 US cities.

IRC Headquarters is at 122 East 42nd Street, New York, New York with approximately 500 staff.

1.3.2. Information Systems

Due to the nature of IRC's work during disaster, conflict, and crisis, and the consequent inconsistency of ISP services, IRC projects operate in environments with particularly severe problems of connectivity and bandwidth. Approximately 30% of programs operate in an environment where access to any online systems is particularly challenging, thus the deployment of an enterprise information system at the IRC requires creative solutions for local functionality and synching of data.

IRC uses the following information systems with relevance to the data platform project:

- Microsoft Active Directory for authentication
- Infor Sun financials
- Windows 7
- Mix of data center and cloud (AWS) infrastructure
- Custom .NET grants management system
- Box.com for document management
- ServiceNow helpdesk

1.4. RFP Document Overview

This RFP covers the system and implementation and support of an organization-wide enterprise program data platform, including the following components:

1) Initial licenses
2) Implementation support for the proposed system, potentially including:

    i. Analysis
    ii. Project management
    iii. Consulting
    iv. Configuration
    v. Integration
    vi. Customization
    vii. Testing
    viii. Documentation
    ix. Training

    Each component may be handled by IRC or the selected vendor depending on vendor capabilities and costs.

3) Hosting and infrastructure costs if relevant
4) Ongoing licensing costs
5) Ongoing support and management of the data platform system either by IRC or vendor

The rest of this RFP is organized into the following sections:

1) Section 2 & 3 - Business process and systems architecture overview: these sections provide an overview of IRC's current analysis of the business processes that the proposed system will support and where the proposed system will fit overall with other systems that IRC uses. Guidance is included on what IRC is seeking in the RFP in response to the information presented.
2) Section 4 - Detailed program data platform requirements: this section includes a mix of the requirements that IRC has identified and specific questions that we have about the proposed system.
3) Section 5 - System Implementation and Support: IRC is seeking implementation services for the proposed system and, depending on the service portfolio of individual vendors, ongoing support, hosting and maintenance of the system. This section outlines IRC's requirements and guidance for responding to the RFP
4) Section 6 - Terms and Conditions
5) Section 7 – Responding to this RFP: including details on how schedules, how IRC will interact with vendors, response requirements and evaluation criteria

Please note: at the end of sections 2, 3, 4, and 5 additional guidance on responding is provided in individual sections of this RFP and called out with an outline and background similar to this one.

2. Business Processes Overview

IRC has identified the following high-level business processes groupings involved in the management of the data lifecycle at various organizational levels.

2.1. Indicator & Data Element Definition

2.1.1 Core Indicator Definition

This designates the process of defining and maintaining core organizational indicators that contribute to IRC strategic objective and outcomes. Led by Headquarters technical units in substantial consultation with field offices.

2.1.2 Outcomes, Logical Framework, Project Indicator & Data Element Definition

This designates the process of defining and maintaining core organizational indicators that contribute to IRC strategic objective and outcomes. Led by Headquarters technical units in substantial consultation with field offices.

2.2. Dashboard Creation

This process covers the definition and creation of core indicator dashboards and dashboards specific to project, country and regional teams. The process can occur at various times (project startup, new country definition, regional re-organization) depending on the specific dashboard in question.

2.3. System Indicator and Metadata Management

This process covers the definition, setup, and management of indicators, collection periods, validation rules, data sets, and metadata such as organizational units, time periods, shape files, naming conventions, indicator mappings, standards definition and other metadata associated with indicator management.

2.4. Data Collection

The collection of different data types at various levels using various methods throughout IRC. This covers types of data including randomized surveys, aggregate data, and individual-level data (which may derive from sources such as class registration and attendance, cash transfer, case management, or electronic medical records systems.

This process includes the definition and setup of custom tools and interfaces.

2.5. Data Entry & Aggregation

The entry of data into a data system, including manual entry and automated data from a systems integration. Data is then aggregated manually or automatically across the required organizational levels (project, country, region, organization) or project requirements (geographical, community, governmental, catchments).

2.6. Data Quality

The process of ensuring data quality through manual review or automated cleansing, including validating source data. Data quality procedures will require system-based workflows that facilitate approvals before data is published, checks on quality, records of completed reviews, etc.

2.7. Analysis

The systematic review of data via dashboards and tabular summaries at various organizational levels, including procedures for more in-depth review and subsequent data quality and/or project design interventions as needed. Similar to data quality, analysis will require system-based workflows that facilitate approvals before data is published, escalations, etc.

2.8. Report Creation

The creation of IRC, government, donor, compliance or ad-hoc reports for online or offline use.

2.9. Core System Configuration

Initial setup of the organizational structure within the system, specifically user roles and permissions, naming conventions, definition of indicators and their components, as well as creation of standard geographical structures (i.e. countries, districts, etc.).

2.10. Ongoing System Administration

Maintenance of the underlying data platform system such as system databases, integrations, synchronization links, security profiles and groupings, and performance.

2.11. Business Process RFP Response Guidance

Please describe the way in which the system proposed can support the business processes identified above. What options are available for configuring automated and event-driven workflows? What workflow options are available for automated handling of data, communications with groups of end users, step handling, and logging?

3. Anticipated Program Data Platform Architecture at IRC

Today, IRC uses a variety of systems to gather and process data across all projects. This section delineates the boundaries of how the proposed program data platform will be situated in IRC's current architectural vision for overall data management.

IRC has identified three primary scenarios architectural scenarios in which the project data platform will interact with other systems in use at IRC across the entire data lifecycle. Below are high-level diagrams which illustrate these scenarios.

These scenarios are not exhaustive in covering every single use case but are indicative of broad categories of projected immediate use.

Note all diagrams are Microsoft PowerPoint slides and can be expanded for readability.

3.1. Scenario 1: 3.4.1. Case Management / Personal Data Collection Systems

IRC does not anticipate using the data platform to gather individual-level information but will instead rely on primary systems – such as Primero, OpenEMIS, Dimagi CommCare, OpenMRS, Vecna – to assure compliance and best operational fit. Some of these systems will be integrated with the data platform to pass summary level disaggregated indicator information such as:

- *Number of cases registered*
- *Number of winterization kits distributed*

The systems listed may operate at a project, country or regional level.

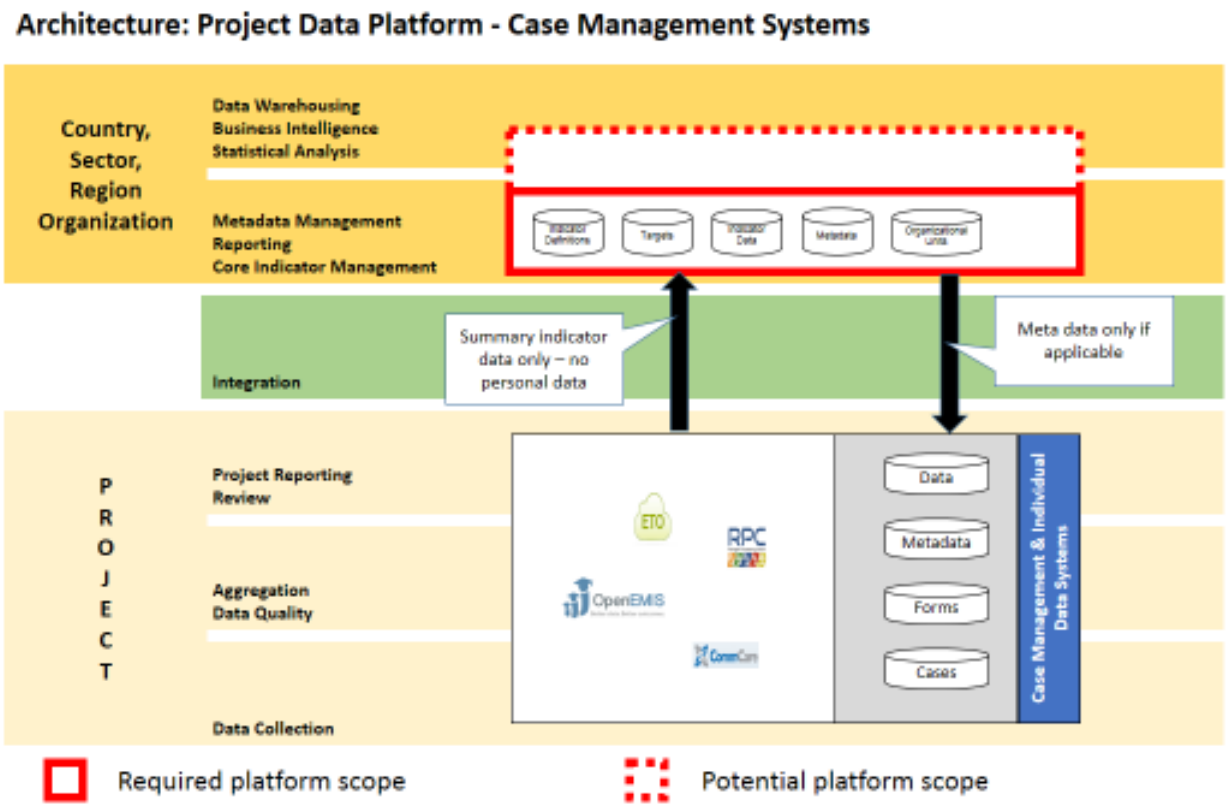

Diagram notes:

1) Individual project systems in use, such as OpenEMIS and CommCare may provide varying functionality across collection, aggregation and reporting
2) Not noted in this diagram are additional detailed project & outcomes management functionality
3) The potential platform scope indicates areas where IRC is interested in learning more about the proposed system's capabilities

3.2. Scenario 2: Survey Data Collection Systems

IRC will not use the data platform to collect survey data but anticipates that other tools such as ODK/onadata, Magpi, and the KoboCat will continue to be used by projects for extensive and varied data collection needs. IRC anticipates using ETL tools to pass summary indicator information or detailed information into the data platform – a determination will be made based on the specifics of each project

and the needs / desirability for recording the detailed data, and the features of the proposed platform. An alternative platform for longer-term storage of detailed survey data may also be defined.

The systems listed may operate at a project, country, regional or organizational level.

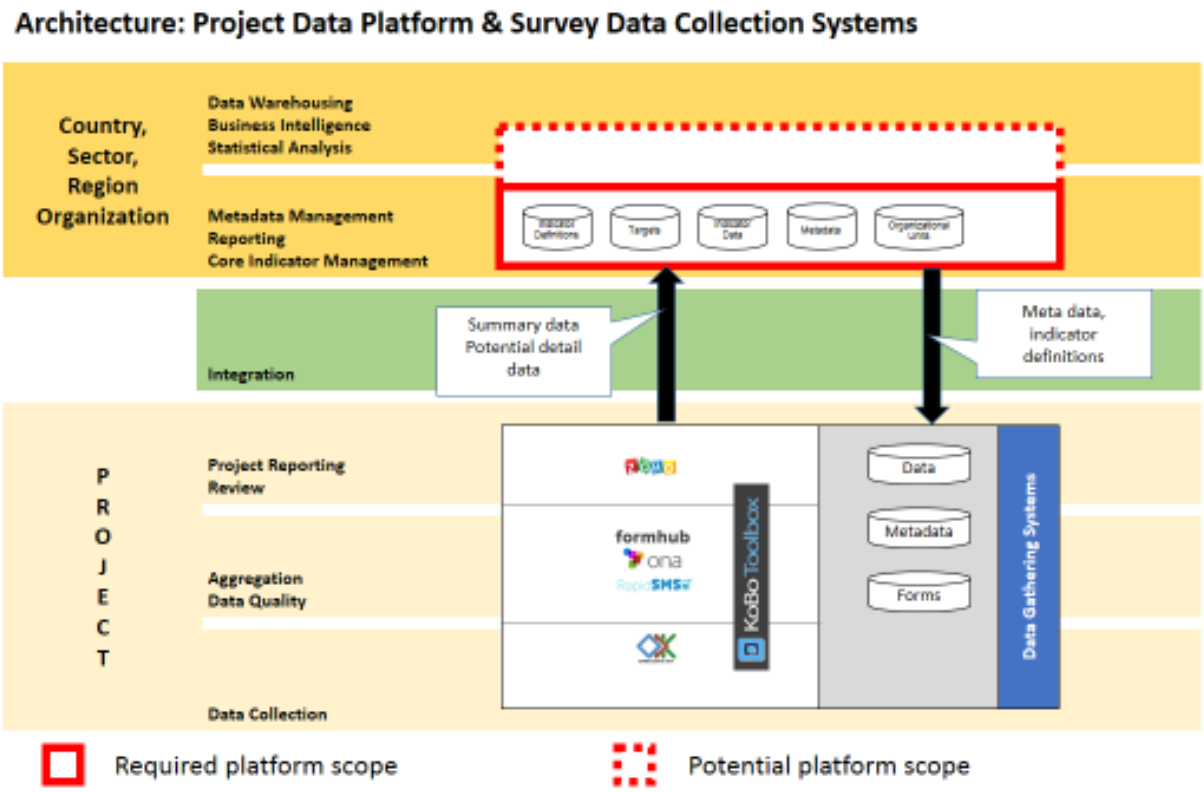

Diagram notes:

1) Individual data collection systems such as KoBoCat, ona, and Zoho Reports provide varying functionality across collection, aggregation and reporting
2) Not noted in this diagram are additional detailed project & outcomes management functionality
3) The potential platform scope indicates areas where IRC is interested in learning more about the proposed system's capabilities

3.3. Scenario 3: Indicator Data Collection System

In this scenario, the proposed data platform is used end-to-end to set up, collect, manage and report on project indicators. All project, regional, country, sector and organizational staff would use the proposed data platform to interact with those indicators.

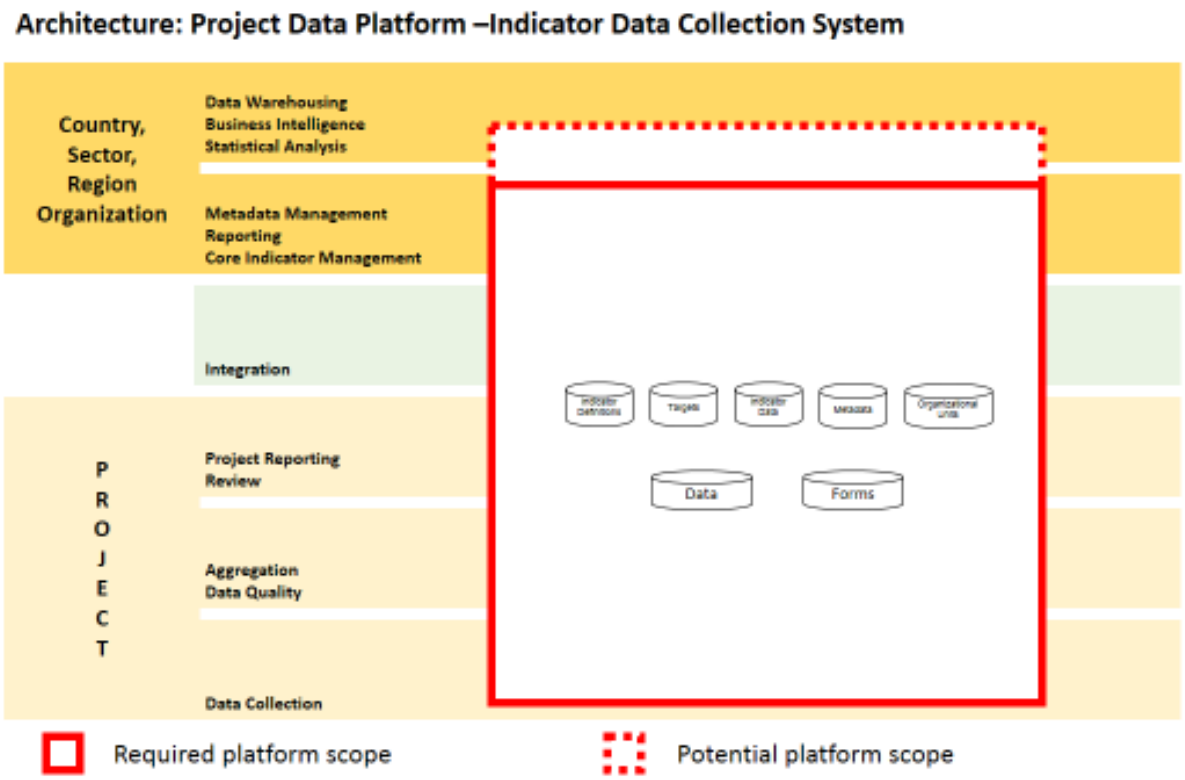

Diagram notes:

1) Not noted in this diagram are additional detailed project & outcomes management functionality The potential platform scope indicates areas where IRC is interested in learning more about the proposed system's capabilities

3.4. Reporting, Visualization, and Analysis Systems

Depending on the data platform capabilities and project requirements, IRC anticipates using additional reporting systems (e.g. Tableau) and data analysis tools (e.g. SPSS) to further interpret and present results. The integration will be through manual or automated extraction of data sets from the data platform. However, by far most analysis will be done within the data platform in the form of graphical and tabular summaries at various levels of disaggregation.

Some of the systems listed may operate at a project, country, regional or organizational level. Data warehousing and visualization systems will operate at a whole organizational level but will use and present data at the project, country, regional and organizational levels.

3.5. System Architecture RFP Response Guidance

In responding to this RFP, please illustrate how the data platform proposed would accommodate the proposed architecture and system interactions listed above. Please provide examples of previously

deployed data and systems architectures and the rationale behind the construction of those models.

4. Features and Functionality

The following are required features and functionality of the program data platform, unless otherwise designated. We understand that there may be variability in the provisions of some of these features; within each section there is additional detail around the specific functionality that the IRC requires as well as specific questions we have. Please provide detailed responses to best of your ability.

4.1. Data Entry, Data Collection, Data Validation

Please describe the proposed data platform's capabilities for data entry, data types supported, and the options for validation of data entered. Please provide screenshots (or online demos) of the data entry screens and describe the extent to which they are configurable and customizable.

Please note that we will not be capturing individual level data in the system.

4.2. Time Periods

Please describe the options for handling different data periods for data collection and analysis.

- Does the system support multiple custom time period overlays for a project or data set; e.g. project year, donor year, financial year, and calendar year.
- Does the system support whole project time periods to allow setting of denominators such as population?

4.3. Indicators, Complex Indicators, Data Sets, Targets, Aggregation

Please describe the capabilities of the proposed data platform for handling the setup, collection, validation, aggregation, cleansing, and grouping of indicators in the system.

- What is the flexibility for tagging and grouping indicators?
- Can complex indicators be created which are automatically calculated from other indicators? To what extent beyond simple numerator / denominator combinations?
- Is aggregation automatic across all organizational units defined in the system which might bear on a particular indicator? Is there a time lag for calculation?
- What functions, features are available to support data quality processes?
- Is all activity logged and reversible?
- At what levels can targets be set for indicators and data points?
- How does the system track performance to targets across varying timeframes?
- What different types of targets are available?
- Can we create and manage logframes in the system?

4.4. Reporting

IRC anticipates using the data platform for a wide variety of repeating and ad-hoc reporting needs, including donor reports, organizational reports and project operations and progress reports.

Please describe the systems capabilities for creating and managing reports including:

- User interface and process for creating reports
- Limitations on the complexity of reports
- Where reports can be combined (e.g. sub reports to represent one-to-many data relationships)
- Charting and visualization options within reports
- Interactivity features of reports (similar to complex reporting platforms such as SQL Server Reporting Services / Tableau / LogiXML / Qlik)
- Any limitation on the amount or size of data that can be included in reports
- Access controls and sharing options for reports
- Ad-hoc reporting options
- Options for central management of reports
- Options for central management to restrict user options for creating new reports or editing existing ones

Screenshots and examples are encouraged.

4.5. Security

The security of the data platform system and its ability to prevent malicious and unintended misuse is a priority. Please indicate how IRC data will be protected at rest and in-motion, and the level of granularity available in the proposed system for user-access controls.

- Is the proposed data platform system and hosting / setup PCI / SafeHarbor / HIPAA compliant?
- Can the system use Microsoft Active Directory/LDAP for authentication?
- Can the system use Microsoft Active Directory/LDAP groups for permissions controls?
- At what level of granularity does the security model operate? (e.g. Organizational Units, Indicator, Indicator Groups)?
- Can the assignment of system permissions be delegated? At what levels (e.g. project, indicator, indicator group, organizational unit)

4.6. Database

Where possible, please describe the underlying database architecture / data model / ER diagrams and the database platforms supported of the data platform proposed.

- Are there limitations on database sizes (absolute size, transactions)? What is the largest current deployment (if relevant)?
- Can IRC interact with the underlying database using standard SQL tools?
- Can IRC modify the data model and / or create additional fields?
- Can IRC export the entire database?
- What whole database synchronization/ETL technologies (such as Microsoft SQL Server Integration Services) are supported?

- What options are available to IRC for standard database administration functions (tuning, backup & recovery & failover, sizing, etc.)

4.7. Workflows

Please describe the capabilities of the data platform proposed for configuring and handling simple and complex workflows, such as approvals, including:

- Communication options (email, SMS, user notifications)
- Parallel workflows
- Step options
- Workflow size or complexity limitations
- User interface and options for configuration
- Monitoring of workflow operations and statistics

4.8. GIS / Mapping

Please describe the GIS / mapping options available in the proposed data platform including:

- Shape file types supported
- Pre-existing operational functionality with standard GIS systems such as ESRI
- Built in functionality for interacting with shape files
- How GIS / mapping options are supported in operational, visualization and reporting functions
- Options for central management of shape files and mapping options
- Options for central management to restrict user options for mapping
- Options for users to use ad-hoc or custom map files in their projects

4.9. Visualization and Dashboards

Please describe the systems capabilities for creating data visualizations (such as charts) and combining those into dashboards, including:

- Chart and visualization types supported
- Mapping / GIS options available
- User interface and process for creating visualizations
- Interactivity features of visualizations
- Any limitation on the amount or size of data that can be visualized
- Access controls and sharing options for individual visualization and dashboards
- Ad-hoc visualization creation options
- Options for central management of core data visualization
- Options for central management to restrict user options for restricting the creation of new visualizations or editing existing ones
- Built-in options for connecting to external systems such as ESRI online, Google Maps, and visualizations

Screenshots and examples are encouraged.

4.10. Integrations

As described in the architecture section above, IRC anticipates that the data platform will co-exist and interact with several “internal” and “external” systems during the data lifecycle. We further anticipate creating guidance for end users on which subset of those systems are best supported for data collection, and creating automated integrations where feasible and cost effective to support the business processes.

Please describe the overall integration capabilities of the data platform proposed, the availability, coverage and maturity of APIs, bulk upload functionality, and the alternatives for manual actions to move data between systems.

Please describe how the proposed data platform could integrate with the systems listed below. Note we are not looking for specifics, such as data mapping, but the overall methodology and approach and any previous experience with the specific system:

1. OpenEMIS – to pull aggregate data summaries and raw data
2. CommCare – to pull aggregate data summaries and raw data
3. KoboCat – to pull aggregate data summaries and raw data. Potential for more interaction for data cleansing.
4. Onadata – to pull aggregate data summaries and raw data. Potential for more interaction for data cleansing.
5. Custom internal .NET application – to pull and present summary information on the status of data management for a project

Please describe additional integrations or data exchanges such as IATI that are supported by the proposed platform.

4.11. Offline Capacity and Synchronization

Given the communications and connectivity context in which IRC programs often operate, please describe how the data platform proposed will work in situations of very low bandwidth, and episodic or missing Internet connectivity.

- How will the data collected be transferred and combined to create a consolidated organizational system? Please give real-world operational examples.
- If automated synchronization between databases is an available feature, please describe the maturity of the technology, the technical details of synchronization used, monitoring and recovery options for interrupted synchronizations, typical schedules supported, whether the synchronization is two-way (e.g. for central management of distributed metadata), and any limitations on the sizes or completeness of data synchronized (sizes, types, ages, etc.).

4.12. Organizational Units

Please describe how organizational units are created and managed within the proposed platform to map to the IRC organizational hierarchies of global, regional, country, project, and locations.

- Does the system support many-to-many mappings (one OU reporting to multiple parents)

- Are there limitations on the number of levels of organizational hierarchy?
- How would the system handle multiple overlapping multi-sector projects which may create overlapping organizational units (this village is part of this OU in this sector in this project and part of that OU in that sector in that project? Can there be imperfect overlaps?
- What information can we specify about an organizational unit (metadata, shape files)?
- What organizational units are built in (countries, regions, cities etc.)?

4.13. Metadata

Please describe the features of the proposed data platform that support management of metadata throughout the system.

- Which aspects of the system's data can be associated or tagged with metadata? Indicators, data sets, organizational units, others?
- What are the best practices for metadata management in the proposed system?
- Can the system integrate with organizational metadata repositories such as SharePoint term stores?
- Are there any limits on the uses of metadata?
- Can metadata be multi-level (metadata about metadata)?
- Can metadata be hierarchical?
- What metadata types are supported (text, numeric, other)?
- Are any standard metadata libraries supported, such as ICD-10?

4.14. User Interface and Customization

Please describe the technologies and principles that underlie the user interface design.

- How will users access the system?
- Is it browser-based or an application?
- What are the guiding design principles and how are they expressed?
- Can the interface be customized? What is the process to do so and the required knowledge set?
- Is data auto-saved during data entry?
- Which languages does the system support? *Please note: At a minimum, the system must support English, French, and Arabic.*
- Does the system support Unicode character encoding and alternate page orientations?

4.15. Documentation and Training Materials

Please describe and provide links and / or examples that illustrate types and quality of the available administrative and user support documentation and training materials.

- In what formats are the materials available?
- Are there course tracking or testing mechanisms to track progress and validate end user competencies?

4.16. Document Management (optional)

Please describe the capabilities of the system to attach documents (links, Microsoft Office, images, etc.) to indicators or other system entities at the point of collection, review, approval or other events.

- Is there a size limitation (individual or total)?
- Are certain types supported natively (e.g. can be viewed in the system rather than downloaded)?

4.17. Project management (optional)

Please describe any project management options included in the proposed data platform such as status tracking, workflows, type data and summaries.

4.18. Financials (optional)

Please describe what kinds of financial information the proposed data platform can store and use and how it can be reflected in reporting and data visualization.

- Can the financial information be used to calculate cost-efficiency for arbitrary indicators?
- How would the system facilitate the association of financial information with indicators and outcomes?
- What support is available for multiple currency calculations?

4.19. Features and Functionality RFP Guidance

We like to read! Please include detailed examples, screenshots, lists of features, and online demos if you think relevant to the question. For online demos, please provide detailed guidance and make them specific to the questions asked rather than a broad demo of entire system capabilities.

5. System Implementation and Support

5.1. Services

IRC will require implementation support during the system implementation. We anticipate needing support in the areas of:

1) Consulting
   Including subject matter expertise on the enterprise systems architecture of whole organization indicators, naming conventions, metadata management, standards and policies in order to promote a successful organization-wide data platform

2) System configuration
   Implementation and setup of the proposed data platform

3) Training

End-to-end training of project staff to successfully use the proposed data platform

4) System Documentation
   Documentation on the system configurations, data and database architecture, metadata management plans and reasoning, and operational maintenance plans.

5) Integration
   Manual and automated integration of the proposed data platform with target systems as listed in the architecture section of this document.

6) End user documentation
   Specific, actionable and simple end-user documentation for each class of users of the system

Please describe the services that you provide in each of these areas and bios of your team members who would be working with IRC.

5.2. Project Timeline Overview

Below is a high-level project timeline overview that IRC has established. Please provide detail on how you would assess this timeline, provide additional detail of how you would break down the implementation and pilot phases, and any additional steps you would include.

Project Stage	Q1 FY15			Q2 FY15			Q3 FY15			Q4 FY15			FY16
	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	
Scoping & Analysis													
Vendor Selection													
System & Change Implementation													
Pilot Rollout & Analysis													
Enterprise Rollouts													
Feature Enhancements & Integrations (FY17 and Beyond)													

5.3. Project Management

IRC has established a project team, steering committee, change management approach, risk register, list of subject matter experts, communications plans and business analysis. Please describe your project management approach and how members of your team will coordinate with each other and the IRC, including schedules, communications, tools, and metrics.

5.4. IT Infrastructure

Please describe in detail the proposed IT infrastructure to support the data platform, including hosting, local installation, multiple installations and synchronization (see above for offline system needs), system and hardware (CPU, storage, memory) sizing information, network loads, transactional volumes, disaster recovery and failover options, archiving, data retention, and security. If multiple options are available, please describe the pros and cons of each using past operational experience and your recommendations to IRC.

5.5. Ongoing Maintenance and Support

Depending on cost and services provided, IRC anticipates an ongoing relationship with the vendor selected to provide long-term support of the system. Please describe whether you provide the following services, and your experience and recommendations:

1. Level 1 support – first line of support to end users
2. Level 2 support – referrals from IRC helpdesk of end user questions where necessary
3. Level 3 support – support to IRC experts
4. System operational performance monitoring
5. Proactive system maintenance (patching, version upgrades, implementation of new capabilities)
6. Consulting services on demand

5.6. Implementation and Support RFP Guidance

Vendors are encouraged to quote a full range of services based on prior experience to ensure a successful implementation. This includes consulting, training, ongoing support and maintenance, and hosting services if provided. IRC acknowledges that this may produce substantial cost variances in proposals: please provide cost breakdowns for each component proposed to enable us to compare appropriately.

Please provide summaries of your experiences, team bios, case studies and your best practices and methodologies with regards to analysis, implementation, configuration, training and documentation.

6. Terms and conditions

By responding to this RFP the Vendor signifies agreement with and is bound by the following Terms and Conditions.

6.1. Definition of Terms

Participating Vendor: a company that has submitted a proposal in response to this Request for Proposals (whether or not it is successful).

Proposal: A response to this RFP submitted by a Participating Vendor.

RFP: Request for Proposals.

Vendor: any company or individual that has received a copy of this Request for Proposals.

6.2. Confidentiality

IRC expects the Vendor to respect the confidentiality of our information. The Vendor shall treat all information gained through participation in this RFP as confidential and shall not use or disclose the information beyond the intended purpose, being the Vendor's preparation and response to this RFP; and shall not disclose the information to any third party, except where the information exists in the public domain and/or is exempt from protection under applicable law. Any other distribution, copying or disclosure is strictly prohibited.

If the Vendor is required to release any of the information to a third party for the purposes of preparing for its proposal, the Vendor is required to solicit at least the same confidentiality obligations from this third party prior to releasing the information.

IRC will consider proposals submitted by Vendors as confidential. All materials submitted by the Vendor will become the property of IRC and will not be returned.

6.3. Marketing References

All Vendors responding to this RFP shall be prohibited from making any reference to IRC in any literature, promotional material, brochures, or sales presentations without the express written consent of IRC as applicable.

6.4. Proposal Validity

Proposals must be valid for 120 days from the Proposal Due Date.

6.5. Acceptance or Rejection of Submissions

IRC is not obligated to accept the lowest cost or any proposal.

IRC reserves the right to:

- Reject any or all proposals
- Issue no contract for any of the services described within this RFP
- Negotiate any or all of the scope and terms of any contract that flows, directly or indirectly, from this RFP
- Add or remove scope into the contract negotiation process

IRC has no obligation to reveal the basis for contract award or to provide any information to vendors regarding the evaluation or negotiation processes.

All participating vendors will be notified promptly of bid acceptance or rejection.

6.6. Contract Negotiation and Execution

It is the intent of IRC that, after the successful vendor has been selected, IRC and the selected vendor will enter into contract negotiations containing all terms and conditions of the proposed service. Any acceptance of a proposal is contingent upon the execution of a written contract and IRC shall not be contractually bound to any vendor prior to the execution of such written contractual agreement.

6.7. Costs

All costs related to the preparation and submission of this RFP shall be borne by the Provider. Under no circumstances shall the IRC be liable for any costs.

7. Responding to this RFP

7.1. Communicating with IRC

All communications in response to this RFP should be addressed via email to:

Sherif Blaku, Procurement Officer, Global Supply Chain
(Sherif.Blaku@rescue.org)

Quentin Scott, Project Manager, IT
(Quentin.Scott@rescue.org)

Copying GSCHD@rescue.org

Please include the following subject line:

<Vendor Name> - IRC Program Data Platform RFP ##288769##

No other communications from vendors is acceptable to the IRC. Any attempt made to communicate with IRC outside the channels noted will be counted against a vendor during the RFP evaluation.

7.2. Schedule

IRC intends to complete this RFP and the section of the data platform system in two phases:

Phase 1 (to be completed by February 23rd 2015)
Initial RFP and responses from vendors. Selection of 2-3 final candidates.

Phase 2 (to be completed in March 2015)
On-site test case evaluations, negotiation, contracting

7.2.1. Schedule for Phase 1

Please be aware of the following schedule for responses to this RFP Phase 1:

January 21st 2015	**RFP Published**
January 29th 2015 5pm Eastern US Time	Intent to respond and written questions submitted to IRC through email
February 2nd 2015 US Close of Business	Responses to written questions sent to all vendors
February 4th 2015 8am Eastern US Time	First open vendor Q&A call – please see below for call information
February 5th 2015 1pm Eastern US Time	Second open vendor Q&A call – please see below for call information – note this call will be canceled if not needed depending on volume of responses and availability of vendors
February 16th 2015 5pm Eastern US Time	**Proposals due to IRC**
February 23rd 2015	IRC evaluations complete and vendors informed of outcomes

7.2.1.1. Open vendor calls

IRC will conduct the first open vendor call as listed above. The second call will be canceled if all vendors who indicate an intent to respond can participate in the first call.

Meeting invites will be distributed with conferencing details on Friday, January 30th.

7.2.1.2. Written Q&A

Questions will be accepted and responded to according to the schedule laid out above. Please try to include references to the specific section of the RFP under question.

Please send all questions via email to Sherif Blaku (Sherif.Blaku@rescue.org) and Quentin Scott (Quentin.Scott@rescue.org), copying GSCHD@rescue.org with the following subject heading:

<Vendor Name> - IRC Program Data Platform RFP ##288769##

All answers to all questions submitted by vendors will be shared with all vendors.

7.2.2. Schedule for Phase 2

IRC intends to complete the final vendor selection and contracting phases as rapidly as possible following phase 1. **For final vendor selection, please reserve availability for an all-day, on-site presentations at IRC New York headquarters to be scheduled during the week of March 2nd, 2015.**

7.3. Proposal Responses Requirements

7.3.1. Two Primary Documents

In making the final decision, IRC considers both the system / implementation and financial aspects. The evaluation team first reviews the system and implementation aspect of the proposal followed by review of the financial aspects of the technically compliant Vendors.

Please submit separate technical and cost proposals in response to this RFP. No price information should be contained in the System and Implementation proposal.

7.3.2. System and Implementation Proposal

The technical proposal should address all aspects and criteria outlined in this RFP. Each requirement indicates the criticality of the particular system feature: vendors are free to suggest/propose alternative solution but must address each requirement. IRC welcomes new ideas and innovative approaches.

IRC strongly encourages vendors to provide relevant case studies of other multi-sector international non-profits who are using the proposed system.

The System and Implementation Proposal should consist of not more than 50 readable pages of content, including relevant company background, experience, staff bios, and system scope.

7.3.3. Cost Proposal

Please submit a separate cost proposal that includes the following costs broken down for each relevant component where you offer the service:

1) Licensing costs for the system to purchase and license for the first year
2) Hosting cost to use the proposed platform in a SAAS model
3) Ongoing licensing maintenance costs (years two and beyond)
4) Implementation costs
    a. Consulting
    b. Project Management
    c. Anticipated Travel
5) Documentation costs
6) Training – please give an indicative staff and setup costs for a full service training under the following scenarios:
    a. Primary, new user training on site at IRC headquarters in New York for 20 M&E officers
    b. Primary, new user training on-site in Port-au-Prince, Haiti for 10 M&E officers
    c. Primary, new user training on-site in Kinshasa, DRC for 20 M&E officers
    d. Refresher training for scenarios a, b, c

    Please include items such as package costs, staff costs, per diems, location pay, materials, and setup. Do not include travel costs.

7) Technical support (under defined level 1-3 above)
8) Consulting rate card – IRC would prefer to have information on the per hour/day cost of ongoing consulting services

The cost proposal does not count against the 50 page limit.

7.3.4. References

Please provide three references for implementations of the data platform system proposed who can speak to the system and / or implementation and / or support services and / or team members in the proposal.

7.4. Evaluation Criteria

IRC will evaluate the proposals according to the quality of the proposal, the ease of use of the system proposed, the fit of the system proposed with IRC's requirements, the reputation and experience of the vendor, and the implementation and ongoing cost of the proposal.

7.4.1. Cost

The cost weight assigned above indicates the general process and weighting that IRC will follow to evaluate competing proposals. However, IRC reserves the right to reject a proposal purely on a cost basis.