

**REQUEST FOR PROPOSAL  
No. [ HPI20210702 ]**

**Integrated Program Management System, IPMS**

<b>RFP Release Date:</b>	July 14, 2020
<b>Performance Period:</b>	6 weeks
<b>Proposal Submission Deadline:</b>	August 26, 2020 2:00pm Central Standard Time
<b>Question/ Inquiry Submission Deadline:</b>	July 23, 2020 2:00pm Central Standard Time
<b>Electronic submission to the attention of:</b>	Hilary Haddigan, Chief of Mission Effectiveness
<b>Electronic submission:</b>	<a href="mailto:Procurement@Heifer.org">Procurement@Heifer.org</a>
<b>Contact information for inquiries about this RFP:</b>	Alyssa Ivaska, Coordinator IPMS Business Process Integration <a href="mailto:Procurement@Heifer.org">Procurement@Heifer.org</a>

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## Acronyms

Collaborating, learning and adapting	CLA
Create, read, update, delete	CRUD
Indicator Performance Tracking Table	IPTT
Integrated Program Management System	IPMS
Intermediate Result Based Budget	IRBB
Monitoring, Evaluation and Learning	MEL
Performance Indicator Reference Sheets	PIRS
Project management	PM
Project Specific Indicator	PSI
Results Framework	RF
Scope of work	SOW
Service level agreement	SLA
Software Development Life Cycle	SDLC
Virtual Indicator Library	VIL

## General Information

Heifer International (Heifer) is a global non-profit development organization working to end hunger and poverty while caring for the earth, in partnership with the communities we serve. Our programs support entrepreneurs around the world, engage with local partners and stakeholders, and create lasting change from the ground up. Heifer uses sustainable practices engaging smallholder farmers in agricultural development to facilitate processes where families and their communities reach a living income.

Heifer is expanding the scope, scale, and impact of its work to empower the most vulnerable small holder farmers who most times have minimum resources for farming, by strengthening the markets they are operating in. Heifer achieves its objective in collaboration with partner organizations such as Donor Agencies, Foundations, Private Sector Partners, and Host Government Institutions.

This document contains the requirements for procuring a Bidder to propose a solution for building an Integrated Program Management System (IPMS) and its application that will meet the purpose stated below.

## Background

Heifer is dedicated to being transparent and accountable to the communities and the donors we work with around the world by effectively and reliably demonstrating project impact. Heifer has committed to streamline the process of managing projects for quality outcomes and impact and align to industry standards. Therefore, the IPMS will be a state of the art, industry standard project management (PM) of scope, schedule and budget, monitoring evaluation and learning (MEL), and collaborating, learning and adapting (CLA) system. It will serve the end user needs to achieve a high level of integration in project management and data analysis to effectively achieve Heifer's mission.

To ensure a consistent approach to project management, information sharing, and learning, Heifer wants a system to provide project teams a tool to assist making informed programmatic decisions, manage their scope, schedule and budget for optimum impacts, and track results for donor reporting. It will promote collaboration and integration between area field teams and their partners, as well as field teams and HQ support functions, which is critical to successful design and implementation. A fundamental component of this system is a fully functional integrated multiple-project/program portfolio management application to support Heifer Signature Programming Portfolios and HQ support with data and fundraising. Heifer is in processes of globally standardizing its IPMS processes, which will integrate the PM, MEL, and CLA processes. The IPMS system aims to assist project teams to make informed programmatic decisions and to manage project scope, schedule, and budget for optimum impact.

Part of Heifer's scaling strategy is Catalytic Leverage Fund (CaLF)/Blended Finance+ (BF+), which are all funds leveraged that do not enter Heifer's financial books, but the data and impact need to be captured. this module will be a part of IPMS to ensure quality data collection, aggregation, and reporting at the program, portfolio, and global level. CaLF/BF+ will be aligned to the standard budget template and reported that way.

Heifer already has various robust internal business systems; it is expected that the IPMS integrates with these systems and builds them up further to their full ability. IPMS should include

an API architecture that is flexible, scalable, and easy to use for current and future application and data integrations. Below are Heifer's current systems:

- Unit4 Enterprise Resource Planning, internally known as Agresso, is an integrated financial and information management system including general ledger, accounts payable and accounts receivable, budgeting, human resources, timesheets, payroll, procurement, and fixed asset accounting. Agresso is the system of record for all of Heifer's financial and human resource data and reporting.
- Laserfiche is Heifer's global enterprise content management system that provides a system of record for documents, digital content, and forms. Business processes, forms and approvals can be developed, customized, and automated using Laserfiche forms and workflow to reduce use of paper forms and lengthy approval times while streamlining the business process.
- Blackbaud CRM, internally known as BBEC, is Heifer's enterprise constituent relationship management system and is the system of record for all donors, their donations, and our relationships with those donors.
- Tableau: used for visualizing data from various systems, predominantly in the form of organizational and team dashboards for revenue, donor research, team metrics and analysis.
- SPSS: Heifer's statistical and analysis software
- SurveyCTO is Heifer's field data collection for project interventions.
- Power BI: Microsoft business data analytic and visualization tool.
- Microsoft 365, including Teams, SharePoint online and OneDrive

## Purpose and Objectives

The IPMS will be agile to respond to dynamic projects, multiple donor requirements, integrate with current systems and better position Heifer for programmatic decision making and fundraising activities. It must be able to clearly track information in all three streams (PMF, MEL, and CLA) in consolidated dashboards. It is vital the system is user friendly, intuitive and can provide value for Heifer staff, partners, and donors. Compatibility with current Heifer systems, technology, and architecture is fundamental.

The vision for IPMS user experience is for a project manager to login into the IPMS and their home page is a dashboard displaying activity progress, current expenditures, schedule, and impact. Key project information is vital to prepare for the day's activities and ensure other project staff are on track. They can go to the partner module and see the status of implementation and expenditures for the project partners. Data is being entered in real time by their fellow project staff across the project geography many times in an off-line template and up-loaded later to be reviewed and cleaned before approved for up-load. Multiple times through the year the project manager is taking this data, reflecting on it with their team, and strategizing around adjustments, scaling, or phasing out.

The project manager is using this data for reporting which the donor can see through their own login. This will assist with discussion if an amendment is required. Fundraising teams can access the data for their marketing materials and to show donors. Senior leadership use the system to look at projects, programs, and portfolios. They will see high level impact data and aggregated expenditures to help them guide the strategic vision for the region. Please see Appendix C. for the high level IPMS process flow.

IPMS is the larger scope for Heifer's project management system guiding all processes for project implementation through the life of the project. Within the IPMS Heifer has identified the basic modules of IPMS (Appendix A.), which are to be developed first before expanding to other modules. The basis of IPMS is the minimum required guidelines, tools, and processes to manage projects for optimum impact and can produce data for fundraising.

Heifer is seeking a Bidder who can provide solutions for the core requirements of IPMS, provide development or additional solutions and support services for future feature evolution, modules, and integrations of the system. The Bidder will be selected based on a competitive procurement process. The expected timeline for completion of the basic IPMS is less than 1 year.

The following future module are not considered IPMS core requirements, but Heifer wants the Bidder to propose viable options and estimated costs for the following:

- Business Management Module –mobile application that assists farmers/SMEs to make business decisions and the data can feed into IPMS. The app will be separated into two parts for farmers and SMEs and provides local market information, production techniques, sales, and financial management. This could be an off the shelf application and these are modules that are not required but optional for Heifer projects to office project stakeholders.
  - o Farm Business Management: assists farmers to increase incomes and close the Living Income Gap.
  - o SME Business Management: assists SMEs to increase revenue.

Heifer's Impact Capital Financial Management System will be a new module and will integrate with IPMS. This module tracks flow of funds loaned, raised funds, repayment rates and other financial metrics. IPMS, through its MEL and CLA components, will track complementary indicators to measure the impact of these investments. These indicators in IPMS will be created at the same level (i.e. Result or IR) that the capital is providing support and expecting to generate a change. These two sets of indicators will be linked and reported or rolled up in the same way that other indicators will be in IPMS.

### **Specific Objectives**

- a. Review Heifer current systems, business processes and suggest a solution to support the business processes of the basic IPMS (Appendix A.). This includes expansion of current systems within their capabilities and integration.
- b. Develop the approved scope of work.
- c. Propose a training plan for the different user levels.
- d. Propose capacity to provide development and support for additional business processes/modules to be built beyond the core requirements. Not required to be within the expect timeline of the IPMS basics.
- e. Propose a maintenance and improvement plan to support the current and future evolution of the system as the system and Heifer's use of it grows.
- f. Service level agreement (SLA) and Help Desk support.
- g. Breakdown of annual maintenance and licensing costs as applicable.
- h. Proposed options for the future modules.

## Scope of Work

The Bidder should identify what business processes and/or tools (e.g. result framework, work plan, indicators performance tracking table, etc.) would-be built-in Heifer's current systems and what would be hosted externally. The process is expected to follow the phases of Software Development Life Cycle (SDLC) methodology. This is a Fixed Price Deliverable based Contract. The expected completion of the tasks below is within less than one (1) year.

### Proposed tasks and deliverable(s) schedule:

No.	Tasks	Deliverable(s)	Responsible
<b>1.0</b>	Discovery and assessment: Full review of Heifer's business process requirements, current field systems and HQ systems to recommend which requirements would be in current systems and what would be external and how would they integrate.	1. Requirement Analysis Report 2. Presentation	1. Bidder 2. Bidder
<b>1.1</b>	Adjustments and planning for the proposed solution.	1. Scope of Work (SOW)	1. Bidder
<b>1.2</b>	Approval of SOW.	1. Review SOW 2. Approval of SOW	1. Heifer 2. Heifer
<b>2.0</b>	Design: Once the requirements are understood and SOW agreed upon, develop the architecture for the software system. Designing integration based on Heifer's current systems.	1. Process flows	1. Bidder
<b>2.1</b>	Software Development: Build the system and integrations.	1. Testable software	1. Bidder
<b>2.2</b>	Test groups: test the software with small groups within departments in Heifer, including partners	1. Testing workshops 2. Provide testing feedback	1. Bidder and Heifer 2. Bidder
<b>3.0</b>	Pilot/testing: User acceptance testing of the functionality of the system, potentially in the field with specific projects. Find and fix issues or defects.	1. Pilot of software with selected Signatures Programs for designated timeframe. Log and report issues and defects. 2. Support user acceptance testing. 3. Resolve reported issues and defects.	1. Heifer 2. Bidder 3. Bidder
<b>4.0</b>	Design and produce training workshops and training materials for users and system administrators. Be specific in the training plan on the different users.	1. Training Plan, training workshop, training videos and manual	1. Heifer and Bidder
<b>4.1</b>	Deployment/launch: prepare a plan to launch globally with a training plan	1. Production launch of system for all projects defined in the Requirement Analysis Report 2. Support global launch.	1. Bidder and Heifer 2. Bidder

<b>5.0</b>	Proposed design and/or integration of a Farm/SME Business Management application within IPMS	1. Proposal	1. Bidder
<b>6.0</b>	Proposed data integration with Heifer Impact Capital Financial Management System with IPMS	1. Proposal	1. Bidder

**a) Relationship and Responsibilities**

The Bidder will keep Heifer informed of their progress during the implementation via a mutually agreed upon program report format and timeframe. The contractor may directly address all inquiries and communication to the assigned Heifer Project Manager.

**b) Approval of deliverables**

The assigned Business Process Owner will be responsible to approve all deliverables submitted by the Contractor.

**Required Expertise**

Experience and reliability of the Bidder’s organization are considered in the evaluation process.

**Therefore, the Bidder is advised to submit the following information:**

- a) Capacity and capability to perform the work as outlined in the business requirements. Including, the types of services your firm is particularly qualified to perform.
- b) Demonstrated experience building similar systems with similar organizations in the industry, these organizations may be contacted by Heifer.
- c) The principle in charge and the individual members of the project team and the specific qualifications and experience (CVs). These individuals shall be highly skilled and have a minimum of five (5) years’ experience implementing the proposed software.
- d) Contact persons in at least three (3) organizations who have employed your firm for projects of the nature and capacity as outlined in the business requirements. At least one (1) reference for implementation of systems with high-level of customization.
- e) Available time commitment and staffing to complete the basics of IPMS within 1 year from contract signing and continue surge support after.
- f) The address from which your firm will be providing services for this RFP.

**Proposed Method of Implementation**

Proposals will be evaluated based on the Bidder’s distinctive plan for performing the requirements of the RFP. The Bidders should present a written narrative, which demonstrates the methodology the Bidder proposes to satisfy the requirements. The language of the narrative should be concise and limited to facts, solutions to problems, and plans of proposed actions with estimated timeline. Heifer will shortlist bidders who have current systems that appear to meet the needs to present a demonstration. Heifer is not required to view all systems proposed only those deemed to fit Heifer’s objectives.

**Proposal submission requirements:**

Heifer will *not* be responsible for any costs incurred in submitting proposal. All interested Bidders will submit their proposals with the following information not to exceed 15 pages:

General Information

- a. Cover page (*not included in the page limit*)
  - Organization summary
  - Primary and secondary contact information



- b. Organizational capacity statement including past experiences developing and implementing state of the art systems for international development organizations with high level of integrations and sound security.
- c. Reference (at least 3) information must include the location and brief description of work performed.

Technical Proposal

- a. Detailed methodology on how the SOW will be implemented, including a clear and comprehensive work plan, outlining the major activities, milestones, roles and responsibilities, and time schedule
- b. List the proposed technologies and other system not a part of the bidder primary system.
- c. Describe potential integrations with Heifer's systems .
- d. Verify capacity to meet each of the business requirements – Attachment A (*not included in page limit*).
- e. List and briefly describe the team and its proposed personnel, indicating what role each proposed individual will have and the qualifying skill set. (Curriculum vitae (CV) of Key personnel to be provided in attachment).
- f. Proposed viable options for future module integrations.

Financial Proposal (*not included in the page limit*)

- a. The Bidder should provide sufficient detail to allow evaluation of costs proposed. It should at least contain cost of the following (Heifer reserves the right to request further information supporting detailed costs and prices):
  - IPMS Software Discovery and Design.
  - IPMS Software System Design and Setup.
  - IPMS Software Integrations.
  - IPMS Software System annual support with a detailed schedule over a 10-year period.
  - IPMS Software users 1000+ (*clearly define what Bidder constitutes as a user*)
  - IPMS Software System user training for up to 100 users.
  - Estimated costs for the future module development: Farm Business Management and SME Business Management modules
  - Cost breakdown for annual maintenance and licensing.
- b. - Costs for additional surge support for continued developed of system components.

Interested Bidders are requested to submit a proposal typed in Georgia font, size 11, and in English by [August 26, 2020] to email: Procurement@heifer.org. Subject line must state IPMS RFP Submission. Please include the name of the person in your organization who will be involved with negotiating the contract as well as a telephone and email contact. All pages must be numbered, included the RFP reference number and name of the organization at the bottom of each page.

Late submissions and verification:

Proposal received after the submission deadline will *not* be considered. Bidders are responsible to ensure their proposals are submitted according to the instructions stated herein. Heifer retains the right to terminate this RFP or modify the requirements upon notification to the bidders.

## Selection Criteria

Submitted proposals must clearly demonstrate alignment with the SOW outlined above with appropriate level of details. The award of an agreement will be made to a vendor, whose proposal receives a favorable evaluation and recommendation of the selection committee. Proposals will be evaluated according to the following criteria and eligible for up to 60 points:

### Short-List Identification Criteria

Criteria	Responsiveness to the RFP - Description	Points
Functionality	This criterion considers but is not limited to the following: <ul style="list-style-type: none"> <li>- The bidder's written responses to the Functional and Technical Requirements for proposed functional areas.</li> <li>- The ability for the proposed integrate system with Heifer's systems environment.</li> </ul>	20
Technical	This criterion considers but is not limited to the following: <ul style="list-style-type: none"> <li>- Alignment of the proposed system to the Heifer's preferred technical specifications.</li> <li>- The bidder's written response to each Potential Interface.</li> <li>- The ability of the bidder to support the Project Objectives, and Heifer Leadership Goals and Objectives, in terms of technical criteria.</li> <li>- The level of integration among proposed functional areas.</li> </ul>	15
Approach	This criterion considers but is not limited to the following: <ul style="list-style-type: none"> <li>- The described approach to implement an enterprise system to achieve the Heifer's goals and objectives.</li> <li>- The alignment of the proposed implementation timeline to the Heifer's desired timeline.</li> <li>- The distribution of implementation tasks among Heifer and bidder teams.</li> <li>- The proposed resources hours among Heifer and bidder teams.</li> <li>- The bidder's approach to key implementation tasks including but not limited to data conversion, testing, and training.</li> <li>- The bidder's planned ongoing support and maintenance services.</li> </ul>	10
Bidder and Proposed Staff Experience	This criterion considers but is not limited to the following: <ul style="list-style-type: none"> <li>- The bidder's experience delivering the services requested in the RFP.</li> <li>- The bidder's experience with similar implementations for comparable organizations.</li> <li>- The bidder's experience deploying comparable interfaces to the Heifer's related applications.</li> <li>- The experience of named staff delivering the services requested in the RFP.</li> <li>- The experience of named staff with similar implementations for comparable organizations.</li> <li>- The qualifications of named staff to deliver the services requested in the RFP with a focus on business process optimization.</li> </ul>	10
User Experience	This criterion considers but is not limited to the following: <ul style="list-style-type: none"> <li>- The Bidder understanding of what the end users need from this system.</li> </ul>	5

	- The Bidder clearly explains how the proposed solution will be user friendly, agile, and operate in low bandwidth	
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**Finalists Identification:** Heifer intends to utilize the criteria presented below following the demonstrations by Short-List bidders. Each Proposal will be eligible to be awarded up to 10 points at this stage.

**Finalist Identification Criteria Scripted Demo**

Criteria	Presentation/Demo - Description	Points
Functionality Demonstrated and Approach	This criterion considers new information learned through a scripted bidder demonstration including but not limited to: <ul style="list-style-type: none"> <li>- The demonstrated user interface.</li> <li>- The alignment of demonstrated functionality with preferred business processes.</li> <li>- This approach criterion considers new information learned through the Implementation Approach Discussion as part of bidder demonstrations as well as other sessions.</li> </ul>	5
Experience Discussion	This criterion considers new information learned through the Company Overview Discussion as part of bidder demonstrations as well as other sessions.	5

**Cost Point Allocation:** Heifer will evaluate cost proposals based upon these criteria. Cost points will be applied at the timing determined by the Evaluation Team. Cost points may be refined or replaced in the event of a subsequent Request for Clarification or Request for Best and Final Offer (BAFO). Each Proposal will be eligible to be awarded up to 30 points for cost.

**Cost Point Criteria**

Criteria	Description	Points
Cost	<p>This criterion considers, as applicable, the costs related to the <b>Proposed Tasks and Deliverables</b> table. It should include the cost of the software license/subscription schedule, services, and terms of any offered ongoing maintenance and support (including applicable service level agreements, disaster recovery, etc.) proposed in response to the information solicited by this RFP. Respondents will be evaluated on their pricing scheme, as well as on their price in comparison to the other proposers.</p> <p>In evaluating cost, Heifer will evaluate on a fully loaded ten-year total cost of ownership. Fully loaded is defined to include (but is not limited to): software purchase/subscription and implementation costs; user license costs; ongoing support and service costs; hardware costs; hosting and associated hardware support costs. Heifer reserves the right to add their own estimates of the costs (including any anticipated savings) associated with the required level of internal staffing (business users and IT staff) for implementation and for ongoing support, hardware and overhead costs and savings, and may rely on the Respondent’s resource estimates as a basis for their calculations.</p>	30

The bidder selection committee will evaluate the technical proposal based upon the criteria listed above and the financial proposal will evaluate the reasonableness of costs and cost-effectiveness.

## Validity of Proposals

Proposals submitted shall remain open for acceptance for 90 days form the last date specified for receipt of the proposal. This includes, but is not limited to pricing, terms and conditions, service levels, and all other information. If your organization is selected, all information in this document and the negotiation process are contractually binding.

## Award Process and Contract Mechanism

The proposed contracting mechanism is Milestones/Fixed Price Contract. The following award process is subject to change if Heifer deems necessary.

No.	Activity	Due date
1	Posting of RFP	July 14, 2020
2	Written Q&A 2:00pm CST	July 23, 2020
3	Signed and submitted NDA	July 23, 2020
4	Heifer response to Q&A	July 30, 2020
5	Proposal deadline 2:00pm CST	August 26, 2010
6	Selection Committee review	August 27-Sept 11, 2020
7	Scripted demonstrations of systems – selected bidders	September 16-18, 2020
8	Reference review	August 31 – September 11, 2020
9	Notification of award	September 23, 2020
10	Award agreement negotiation	September 23 – 30, 2020
11	Signing award	October 1, 2020

Heifer will issue a Contract based on submission and Heifer acceptance of deliverables. The contract will include payment schedule with deliverables specified above. The non-disclosure agreement must signed and submitted prior to the July 23, 2020 by email to [procurement@heifer.org](mailto:procurement@heifer.org).

## Limitations

This RFP does not represent a commitment to award a contract, to pay any costs incurred in the preparation of a response to this RFP, or to procure or to contract for services. Heifer reserves the right to accept or reject in its entirety and absolute discretion any proposal received because of the RFP.

## Whistleblower

This policy was created in connection with Sections 806 and 1107 of the Sarbanes-Oxley Act. Heifer implemented this policy to maintain high standards of conduct and ethical behavior. Heifer Staff, Board members, and Vendors should report suspected waste, abuse, Fraudulent or Dishonest Conduct and/or violations of Heifer’s Policies or applicable law (i.e. act as a Whistleblower). Heifer will investigate such claims, and will protect Whistleblowers who report them from retaliation, in the manner described in this policy.

## Other Contract Requirements

Standard Contract: The awarded contractor will be expected to enter a contract that is in substantial compliance with [Heifer’s standard contract](#). Proposal should include any desired

changes to the standard contract. It should be noted that there are many clauses which the Heifer cannot change.

## Applicable Regulations

Bidders must be legally registered/licensed to operate and provide the required services.

### Appendix

- A. Non-disclosure Agreements
- B. IPMS business process requirements
- C. IPMS flow

## A. Non-Disclosure Agreement

This MUTUAL CONFIDENTIALITY AGREEMENT (“MCA”) is entered into as of \_\_\_\_\_, 20\_\_\_\_ (“Effective Date”), by and between HEIFER PROJECT INTERNATIONAL, an Arkansas nonprofit corporation (“Heifer”), and \_\_\_\_\_, a(n) \_\_\_\_\_ (“Company”). For good and valuable consideration, the receipt and sufficiency of which are hereby acknowledged, the parties hereto (singularly a “Party” and collectively the “Parties”) agree as follows:

**Section 1. Relationship/Warranties.** Parties contemplate a relationship whereby Company may complete certain work and/or projects for Heifer (“Project”). In order for Company to complete the Project each Party (the disclosing Party is known hereinafter as the “Discloser”) must provide to the other Party (the receiving Party is known hereinafter as the “Recipient”) certain proprietary, secret, confidential and/or other information not generally available to the public, which may include but not be limited to trade secrets, project participant information, donor information, fundraising and business strategies, materials, processes, procedures, systems, computer programs, devices, operations, personnel records, and financial information (the “CI”). THE CI IS PROVIDED “AS IS”, AND DISCLOSER MAKES NO WARRANTIES, EXPRESS, IMPLIED OR OTHERWISE, REGARDING THE ACCURACY, COMPLETENESS, OR PERFORMANCE OF THE CI.

**Section 2. Confidentiality/Damages.** No license is granted hereby, and the CI shall remain Discloser’s property. The CI is being disclosed to Recipient solely for the express purpose of allowing Recipient to complete the Project, and Recipient shall not use the CI for any other purpose. Recipient agrees it will hold the CI in strict confidence and (a) shall not misappropriate or mishandle the CI, or otherwise disseminate, divulge, or disclose, or cause, assist, or allow any other party to disseminate, divulge, or disclose, all or part of the CI to any third party, other than Recipient’s third party professionals also bound by a duty of confidentiality at least as comprehensive as that contained in this MCA (“Authorized Individuals”), and (b) shall not take any other steps to prevent or circumvent the broad goals and intentions of this MCA. If Recipient finds it necessary to disseminate the CI to Authorized Individuals, it shall inform them of the confidential nature of the CI, and Recipient shall be responsible for any and all damages caused to Discloser if said Authorized Individuals do not abide by this MCA. Recipient agrees irreparable damage may result from a breach of this MCA, and that a breach may be remedied by specific performance, immediate injunction, and any other remedies allowed by law. Within ten (10) days of Discloser’s request, Recipient shall return all CI to Discloser, and will not retain any copies thereof. CI shall not include any information which Recipient can establish (a) was publicly known and made generally available in the public domain prior to the time of disclosure to Recipient, (b) becomes publicly known and made generally available after disclosure to Recipient by Discloser through no action or inaction of Recipient, or (c) is in the possession of Recipient, without confidentiality restrictions, at the time of disclosure by Discloser as shown by Recipient’s files and records prior to disclosure. Notwithstanding anything herein to the contrary, Recipient may disclose CI to the extent necessary to comply with any law, regulation, or court order; provided Recipient must promptly notify Discloser of such proposed disclosure or delivery prior thereto. In addition, Recipient shall, if requested by Discloser, use its best efforts to lawfully cooperate with Discloser to seek a protective order or other appropriate remedy to prevent the disclosure of CI. This **Section 2** shall survive the termination or expiration of this MCA.

**Section 3. Miscellaneous.** This MCA may be executed in multiple counterparts which, when read together, shall constitute and comprise a single document. Facsimile signatures hereto shall be as enforceable and binding as manual signatures hereto. This MCA shall be governed by the laws of the State of Arkansas, and all disputes that might arise hereunder shall be adjudicated exclusively in Pulaski County, Arkansas. This MCA may only be modified or amended by a written document executed by and between the Parties. This MCA constitutes the entire agreement and understanding

between the Parties relating to the subject matter contained herein, and supersedes any prior or contemporaneous terms, representations, statements, or agreements, whether made orally or in writing, with respect to the subject matter contained herein. Each party executing this MCA covenants that he/she has the power to enter into this MCA and bind his/her principal, if any, thereto. Each provision of this MCA is severable and to the extent any provision is deemed invalid or unenforceable, such invalidity or unenforceability shall not affect the validity or enforceability of the remaining provisions of the MCA. Parties are independent contractors, and this MCA is neither intended to, nor shall it be construed as, creating a joint venture, partnership, agency, employment relationship, or any other relationship that may result in vicarious liability. Nothing in this MCA shall obligate the Parties to enter into any further agreements with one another. A Party may not assign this MCA in whole or in part without the prior written consent of the other Party. Either Party may terminate this MCA upon ten (10) days' prior written notice sent to the other Party.

IN WITNESS WHEREOF, the Parties execute this MCA as of the Effective Date.

HEIFER PROJECT INTERNATIONAL

\_\_\_\_\_ (COMPANY)

Signature: \_\_\_\_\_

Signature: \_\_\_\_\_

Name: \_\_\_\_\_

Name: \_\_\_\_\_

Title: \_\_\_\_\_

Title: \_\_\_\_\_

Date: \_\_\_\_\_

Date: \_\_\_\_\_

## B. IPMS Business Requirements

<b>Function</b>	<b>Business Requirements</b>	<b>Basics</b>	<b>Associated Document(s)</b>
Project Management			
1.0	The system allows managing activities with person responsible and checklists. Activities have targets and are linked to a project and can be linked to an output or outcome	Yes	Workplan Template
1.1	The user can create Gantt charts to plan for activities with start date, end date. The activity's milestones can be specified to track the progress of the activity.	Yes	Workplan Template
1.2	Create, read, update, delete (CRUD) and track progress of an annual work plan by project that is integrated clearly with the Results Framework, Integrated Performance Tracking Table, the Intermediate Result Based Budget, and MEL reporting calendar	Yes	Workplan Template
1.3	Within an activity, users have access to file and photo storage, discussion and communication tools, event calendars.	No	
1.4	Using the Analytics module, you can consult the Activities dataset and produce grids, charts, or maps.	Yes	
1.5	Risk log functionality, including auto-calculated risk ratings and export to Excel	Yes	Risk Matrix (built into Workplan Template)
1.6	Agreements tab, including agreements and amendments log and milestone management functionality	No	PMFIC
1.7	History of modification to see changes made	No	
1.8	System announcements are integrated with discussion spaces to alert everyone to the status of the current reporting window, when results have been submitted for review or returned for changes.	Yes	
1.9	The planning documents (project plans) and reporting documents (quarterly report or annual report) can be configured. Able to choose the title of the document, the period it covers (i.e. month, quarter, or year), the requested data and the workflow of approval	Yes	
1.10	Standard geography overview tab showing key scope, schedule and budget data depending on permissions, including map and key figures roll-up	Yes	
1.11	Automatically generated reports of approvals (including approvers, dates, comments, and ratings) to capture decision-making history	Yes	



1.12	Alerts for overdue milestones, burn rate (over or under spending), other ratios and upcoming tasks	Yes	
1.13	Offline and low bandwidth capability	Yes	
1.14	Manage sub-awards separately	Yes	
Integration & modules			
2.0	Farm computer and mobile application- local market information, production techniques, sales, and financial management.	No	
2.1	SME computer and mobile application- membership, market information, inputs, sales, and financial management.	No	
2.2	Integrations with data from Heifer Impact Capital Financial Management system	No	
Monitoring, Evaluation, and Learning			
3.0	CRUD and track Results Framework (RF);	Yes	MEL Template
3.1	Develop, update and track an Indicator Performance Tracking Table (IPTT)	Yes	MEL Template
3.2	Develop, update and track Monitoring, Evaluation, and Learning (MEL) Calendar	Yes	MEL Template
3.3	CRUD of indicators per project (Indicator Performance Tracking Table IPTT) and globally	Yes	
3.4	Access Performance Indicator Reference Sheets (PIRS) via integrating to Heifer Laserfiche technology solution;	Yes	Indicator Library
3.5	Database for number of farmers, farmer coop, or farmer producer organizations currently working with globally.	yes	
3.6	Incorporate Heifer's Household and Business Transformation models to show targets and progress across the three levels, ABC, to reach sustainable living income for households and economic sustainability for businesses	No	
3.7	Direct entry indicators targets and progress per reporting period, per geographic, demographic, and other disaggregation groups, which are created per indicator. Submitters have the option to key in data and reviewers can review and approve based on workflows	Yes	

3.8	Formula indicators allow users to define a mathematical or logic operation that automatically calculates results based on other component indicators, such as dividing two indicators to generate a percentage indicator (i.e. Heifer's transformation model, project specific indicator (PSI), etc.)	Yes	
3.9	Up-load data via integrations from Survey CTO at various frequencies (including Calf/BF+ data)	yes	
3.10	Should have Data quality reviews and approvals, user permission to access and manipulate data.	Yes	
3.11	Develop reports by project aggregating data within projects and across projects	Yes	
3.12	Provide pre-determined analysis with up-loaded data sets from Survey CTO	Yes	
3.13	Ability to import/export data (via Excel template: Results Framework structure, indicator values, budget, data records)	Yes	
3.14	Link to document and track methodologies and approaches employed to reach IPTT targets, which are linked to work plans	Yes	MEL Template
3.15	Review and adapt methodologies used to reach targets on a scheduled basis (as part of the adaptation process in CLA, adaptive management and using Results Chains)	Yes	Results Chain template
Collaborating, Learning and Adapting			
4.0	Develop and track customized CLA calendar by project	Yes	CLA calendar
4.1	Track CLA checklists for status up-dates on learnings and adaptations to project implementation following the CLA calendar	Yes	
4.2	Integrate with Laserfiche or SharePoint for CLA templates and forms for project use per calendar requirements	Yes	
4.3	Record of activity adjustment with approval.	Yes	
4.4	Link to Laserfiche Forms for amendment process; including amendment checklist	No	

Dashboard/Visualization			
5.1	Dashboard visualizes project progress against the budget and schedule at various levels, including stakeholders progress.	Yes	
5.2	Create dashboards to visualize data on a real-time basis.	Yes	
5.3	Maps can show data for individual reporting periods as well as cumulative results up to a chosen point in time.	Yes	
5.4	User ease of looking up projects, ease of exporting data, ease of developing reports	Yes	
5.5	Dashboard of multi- country, regional or global summaries	Yes	
Operational			
6.0	Link procurement activities within the annual workplan; link to procurement process in LaserFiche	Yes	
6.1	Develop and track donor reporting calendar (integration with Blackbaud - BBEC);	Yes	
6.2	Develop and track project set-up checklists and documentation	Yes	Startup Checklist
6.3	Develop and track project closeout checklist and documentation	Yes	Closeout Checklists
6.4	Standardized folder structures by page type, managed by Administrators	Yes	
6.5	Copy and move project documents between folders or sites	Yes	
6.6	Send documents or link via email from the system	Yes	
6.7	Develop and track inventory	Yes	
Stakeholder Management/Project CRM			
7.0	Standard stakeholder Overview tab showing key data	Yes	
7.1	Able to manage different types of stakeholders (e.g. donors, partners, farmers and farmers coop)	Yes	
7.2	Checks in place for data quality verification	Yes	
7.3	Visibility of stakeholder's related pages (e.g. linked grants and projects) Contacts tab showing contact information for individuals within a stakeholder organization	Yes	

7.4	Activities tab for stakeholder management, including activity and milestone management, activity templates and review and approval functionality	Yes	
7.5	Agreements tab, including agreements and amendments log and milestone functionality	No	
7.6	Roll up for multiple partner level data and information to project/program level	Yes	
7.7	User accessibility for data entry, technical and financial reporting	Yes	
Analysis			
8.0	Run ad-hoc queries on all relational data in the system	Yes	
8.1	Advanced filter functionality to filter query results	Yes	
8.2	Option to save queries for frequent use	Yes	
8.3	Set up Group queries for select users or user groups	Yes	
8.4	Set up Global queries for all users (managed by Administrators)	Yes	
8.5	Export to Excel functionality	Yes	
8.6	The Analytics module allows users to create and save their own reports and data visualizations based on a Theme (dataset) configurable tables, charts, and maps.	Yes	
Human Resources			
9.0	Develop organizational chart to support project implementation; roles may set levels of authority within the system	Yes	
9.1	Develop and track recruitment for staffing plan for project set up	Yes	
Finance			
10.0	Show correlation between Activity-based budget with scope and schedule of a project within the IPMS (integration with Agresso accounting system) based on industry standards ratios for scope, schedule, and budget	Yes	IRBB
10.1	Allow tracking of financials by donor and Heifer requirements and fiscal years	Yes	
10.2	Comprehensive Agresso integration	Yes	

10.3	Project budgeting functionality that supports the IRBB template, including version control, multi-level hierarchy, cost types, multiple currencies, and export to Excel functionality	Yes	
Compliance			
11.0	Develop and track risk assessment matrix integrated with operations calendar	Yes	
11.1	Track project against Compliance Requirement Matrix (integration with Laserfiche documentation);	Yes	
11.2	Track external donor compliance requirements.	Yes	
11.3	Integrate country compliance metrics for graduation.	Yes	
Reporting			
13.0	The reporting functions shall support multilingual (Spanish, French, English) data labels and report filters	Yes	
13.1	The online version of reports should display the language based on the user's profile that is set up as they register to use the system the first time	Yes	
13.2	There will be standard pre-determined reports (determined at the project set up stage) organized to run on a pre-defined schedule for all projects, consolidation of project data, and analyses as they are determined by Heifer	Yes	
Security			
14.0	Identities and credentials are issued, managed, verified, revoked, and audited for authorized devices, users and processes.	No	
14.1	Encryption of data in transit and at rest.	Yes	
14.2	Provide audit trail capability of system including login attempts, data changes, account creation\deletions, and system changes.	Yes	
14.3	Utilize SSL/TLS to encrypt data between servers and clients.	Yes	
14.4	Regular data, server, and configuration backups. Defined process of data recovery/system rollback documented,	Yes	

	and proof of testing performed. Defined disaster response plan is in place and managed.		
14.5	Support EU GDPR.	Yes	
14.6	Each service of the app (webserver, database, mail,) are either on a separate server or use a separate SaaS.	Yes	
14.7	Security protocols and industry best practices on apps and/or devices to prevent theft and protect privacy including data encryption on mobile devices	Yes	
14.8	Firewalls, intrusion detection and prevention services in use and up to date based on current industry standard to protect the server and data infrastructure. A detailed incident response and communication plan must be provided.	Yes	
14.9	Infrastructure and OS's are regularly updated with the service with the latest and stable operating system update, application, and security patches, following best practices.	Yes	
14.10	All data integrations (API's, Web Services, services linking) must adhere to industry best practices for authentication and data encryption.	Yes	
14.11	Must support all recent versions of popular web browsers (Chrome, Firefox, Edge, and Safari).	Yes	
14.12	Access permissions and authorizations are managed, incorporating the principles of least privilege and separation of duties.	Yes	
14.13	Support multi-factor authentication methods.	Yes	
14.14	The development and testing environment(s) are separate from the production environment.	Yes	
14.15	Defined configuration change control processes are documented and in place.	Yes	
User Management			
15.0	Must be able to accommodate and scale to many users (1000+).	Yes	
15.1	Support Single Sign On and/or authentication via Active Directory Federation Services (ADFS).	Yes	
15.2	Role based access with pre-defined roles and the ability to define custom roles based on Heifer needs.	Yes	

15.3	Ability to define role-based access globally across projects and at a granular level within each project. Including donor access with high level project information.	Yes	
15.4	Ability to define and identify internal and external users.	Yes	
15.5	Ability to define time/date restrictions and terminations on user accounts.	Yes	
15.6	Ability to bulk load users via an import process.	Yes	
15.7	Ability to bulk change users' access via an import/update process.	Yes	
15.8	System administrator(s) has access to more system configuration options (system or user management, data integrations, backup and recovery settings, categories in dropdown lists, etc.)	Yes	
15.9	Confirmation messages are presented before deletion.	Yes	
15.10	Data validation should be done server-side, partner side, client side, online and offline	Yes	
Integration			
16.0	Integration with future and existing Heifer systems listed below via either API's, CSV import/export, database views, etc.	Yes	
16.1	Blackbaud CRM (Known internally as BBEC): donor reporting up-loaded into the intake form at set-up stage in IPMS.	Yes	
16.2	Unit4 ERP (Known internally as Agresso): Intermediate Result Based budget in Agresso will be synced into IPMS against scope and schedule to be determined at set-up stage; One way pull IRBB actuals to Agresso.	Yes	
16.3	Laserfiche CMS (Used internally for content storage and forms-based processes\approval workflows): document and photo storage. Lookup of project data to display in forms.	No	
16.4	Laserfiche: PMFIC code to be same for IPMS and entered in set-up stage; Virtual Indicator Library (VIL) and Performance Indicator Reference Sheets (PIRS) to be linked to IPMS in IPTT tables; Procurement; Operations project set-up and close-out checklists – documentation to be linked to Laserfiche folders, and Compliance reporting matrixes documentation to be linked to Laserfiche folders.	Yes	

16.5	Survey CTO: IPMS to up-load all data from survey CTO into the IPMS enterprise management system to integrate with other IPMS data and report on data and conduct analysis	Yes	
16.6	ArcGIS or other industry standard mapping solution: either an internal integration into the IPMS software or an integration with an external software; to be proposed	Yes	
16.7	System needs to support workflow integrations and exchanges of information.	Yes	
16.8	Integration or building our SharePoint online to its full capabilities	Yes	
Forms			
17.0	The ability for form elements to be replicated with different projects (including option lists);	Yes	
17.1	The ability for form copying within and between projects	Yes	
17.2	The ability for customized forms to be replicated and used within and between projects	Yes	
17.3	The ability to support multiple languages per form, there should not be a form per language (Spanish and French)	Yes	
17.4	All form templates as well as actual forms should be available as a library and access restricted depending on users' permissions	Yes	
17.5	Form design to include robust and complex data validation on each input field depending on data type	Yes	
17.6	The ability for an administrative role to create form groups/packages for bulk form sharing within a project	Yes	
17.7	SurveyCTO forms (i.e. CaLF/BF+ survey forms)	Yes	
17.8	Error messaging to occur when forms fail to up-load properly, GPS capture, data management reporting, etc.	Yes	
Warranty			
18.0	For a period of 1 year following the official launch of the system for all the customized features. After 1 year, the maintenance of the customized features can be done under a support agreement.	Yes	



### C. IPMS Flow

