

Request for Proposal

IT Strategy Development and Software Evaluation and Implementation

4 September 2012

1. Background

The Verified Carbon Standard Association (VCSA) manages the VCS Program, which provides a quality assurance framework for greenhouse gas emissions (GHG) reduction and removal projects. VCS is one of the most widely used standards for generating GHG credits in the voluntary carbon market. Under VCS, a GHG credit representing one metric ton of CO₂ equivalent removed from the atmosphere is known as a Verified Carbon Unit, or VCU. Investors in the voluntary carbon market rely on VCS to ensure that all VCUs are real, additional, measurable, verifiable, permanent, and transparently registered and listed online.

The VCSA's information technology (IT) system currently includes a project database where more than 800 projects and 100 million credits are registered and traceable online, a website, and an internal IT network that includes a server and approximately 12 employee work stations. The VCSA contracts with separate outside vendors for each of these services. Looking to the future, the VCSA anticipates that, at the very least, it will need to add a collaborative workflow management system to manage internal processes efficiently.

The VCSA seeks an information technology consultant to: 1) conduct a comprehensive assessment of its current IT systems and develop an IT strategy for the organization; and 2) to evaluate and implement a collaborative workflow management system/ system.

2. Scope of Work and Deliverables

Deliverables will include, at a minimum:

- 1) IT Strategy - The VCSA requires an information technology consultant to develop an IT strategy. Specifically, the consultant will:

- a) Conduct a comprehensive assessment of VCSA's current IT capacity and spending.
- b) Make recommendations for rationalizing spending.
- c) Make recommendations for improving IT capacity and systems and ensuring better alignment of IT system with organizational goals and objectives. This shall include recommendations for an IT system to automate inter-registry transfers. (See Annex 1)

The IT review will include evaluating the database, the website and internal IT systems in order to identify strengths, weaknesses and any potential synergies. The consultant will be given access to information from all outside vendors in order to conduct a comprehensive assessment. The consultant must also gather information from VCSA management and staff to understand and provide recommendations for internal and external IT needs.

- 2) Evaluation and implementation of a collaborative management system to track interactions with a wide range of clients and vendors, and automation of various aspects of the VCSA's internal workflow (See Annex 2). Specifically, the consultant will:
 - a) Evaluate and select the appropriate software and vendor.
 - b) Work with the chosen vendor to customize the software to VCSA's functional requirements.
 - c) Facilitate the user testing and implementation of the software, and provide training to staff as needed.

The consultant will need to review key internal management procedures and gather information from VCSA staff to understand the needs of the VCSA, and to ensure that the software is appropriately customized to VCSA's functional requirements.

3. Review of Proposals

The VCSA will review proposals based on the following criteria, with the corresponding weight assigned to each:

- Experience with relevant systems and technologies (25%)

- Experience consulting on company-wide IT solutions (25%)
- Timeframe for completing the assignment (25%)
- Cost of completing assignment (25%)

Proposals are due by 30 September 2012. The selection of the consultant is expected to be finalized by 30 October 2012.

4. Milestones and Timeline

Milestone	Indicative Timeline
Kick off meeting	5 November 2012
Brainstorming session(s) on IT needs and functional requirements for collaborative management software	12 November 2012
Functional requirements document for collaborative management software	19 November 2012
Briefing on recommended software and implementation plan	26 November 2012
Implementation of software	December 2012/January 2013
User testing of software	7 January – 11 January 2013
Briefing on recommended IT strategy	14 January 2013
Draft IT strategy	21 January 2013
Final IT strategy	28 January 2013

Should you have questions, please contact

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Annex 1

New Communication Standard for VCS Registries: Objectives and Functional Requirements

Objectives

In an effort to strengthen the current system of VCU issuance, retirement, transfers and reconciliation, the VCSA has committed to moving towards a more secure and efficient registry communication standard. The key objectives that will drive the implementation of the new registry communication standard are as follows:

- 1) Streamline registry procedures through increased automation
- 2) Reduce the need for manual registry operations
- 3) Reduce human error risks in respect of registry operations
- 4) Enhance security of inter-registry transfers

Key functional requirements

The new registry communication standard should have the following functionalities:

- Automation of VCU issuance through the VCS project database
- Automation of VCU retirement
- Automation of inter-registry VCU transfers
- Automation of registry account reconciliation
- Enhanced security features

In selecting the communication standard, the consultant should evaluate, at minimum, the following options.

- 1) UNFCCC Standard: The UNFCCC's communication standard was developed to handle its own registry messaging needs in respect of the Kyoto structure.

- 2) SWIFT: The SWIFT Standard was designed to send standardized peer-to-peer messages amongst financial firms.
- 3) VCS Automated Programmatic Interface (API): The VCS API would be an adaptation of a system of communication designed by APX for managing inter-registry transfers across all Renewable Energy Registries in the U.S (ie, transfers of Renewable Energy Certificates (RECs)).

The selection should be based on fit with the objectives and functional requirements as set out above, cost and technical robustness of software. The selection of the communication standard should also take into account the risks and benefits of adopting a given standard from a broader carbon markets perspective.

Annex 2

Collaborative Management Software System for VCSA: Objectives and Functional Requirements

Objectives

Given the rapid growth of the organization and its volume of work, the VCSA seeks to set up an internal software system that would enable it to track stakeholder interactions and manage work flows more effectively. The key objectives that will drive the implementation of such a platform are as follows:

- 1) Track and manage interactions with stakeholders – includes all stakeholder enquiries, complaints and appeals.
- 2) Automate various aspects of VCS workflow:
 - a) Track and manage methodology approval process
 - b) Track and manage registry audits
 - c) Track and manage validation/verification bodies oversight procedures (ie, project reviews)
 - d) Track and manage program updates
 - e) Track and manage public consultation process
- 3) Track and manage contacts and communications – this includes newsletters, webinars, and public announcements.

Key functional requirements

The system should have the following functionalities:

- Ability to share and manage documents
- Ability to automate approvals
- Ability to create issue logs
- Ability to generate reports
- Search capabilities

- Ability to allow multiple users in multiple sites to access it
- Integration with email and phone
- Data recovery and backup features
- Security and authentication features
- Ability to send automated email responses in certain cases
- Ability to allow for future functional enhancements as needed.

In selecting the software, the consultant should evaluate both enterprise software and cloud based software, and consider a range of packages such as Sales force, Sharepoint, Basecamp and Carbonflow. The selection should be based on fit with the objectives and functional requirements as set out above, cost and technical robustness of software. The selection should also take into account the ease of use of the software.