**GICHD**

Geneva International Centre for Humanitarian Demining
Maison de la paix | Tower 3
Chemin Eugène-Rigot 2C | PO Box 1300
1211 Geneva 1 | Switzerland
T +41 22 730 93 60 | info@gichd.org | www.gichd.org

# Request for Offer

## *Software and Implementation Services for CRM, Results & Projects*

## Introduction

The [Geneva International Centre for Humanitarian Demining](#) (GICHD) is pleased to invite qualified consultants to submit an offer for the provision of the description the system and services described below as per requirements set out in this request for offer.
**Reference number:** RFO/2024/TOCSYS
**Issue date:** 2 July 2024
**Deadline for submission of the Request for offer form:** 23 July 2024, 08:00, GMT+1.
**Currency:** The proposal and quotation shall be presented in Swiss Francs (CHF)
**Language:** The proposal and quotation shall be submitted in English
**Submit to:** consultants@gichd.org   cc: h.tejerina@gichd.org

## Background

The Geneva International Centre for Humanitarian Demining (GICHD) works toward reducing risks to communities stemming from explosive ordnance, with particular focus on mines, cluster munitions, other explosive remnants of war and ammunition storages. The Centre helps develop and professionalise the sector for the benefits of its partners: national and local authorities; donors; the United Nations; other international and regional organisations; non-governmental organisations; commercial companies; and academia. It does so by combining three distinct lines of service: field support and capacity development and advice; multilateral work focused on norms and standards; and research and development focused on cutting-edge solutions.

The GICHD has grown substantially in recent years in the scope of programmatic work as well as overall staff headcount.  The organisation's systems and structures have been updated at varying paces, striving to keep up with both the overall organisation growth as well as to adapt to new ways of working.

The GICHD employees about 90 staff with an annual budget of approximately 21 million CHF.

## Current Systems

The GICHD uses a patchwork of tools to manage information about its Theory of Change and the activities that advance it.  The relevant information may be grouped into three areas:

1. Projects – A list of projects is maintained in SharePoint, offering a description of each project. However, each project manager uses their own preferred toolset to track the details of their project schedule, activities and interlocutors.  To gather information about the current status of projects requires asking each project manager individually.
2. Monitoring – With the start of the latest strategy, an intentionally temporary method was setup using Access and Excel to track results. The toolset has limited capability, is difficult to use, and difficult to report from.  It complements and, in some areas, duplicates the previous results-based management toolset.
3. Constituent relationships – Information about the organisations and individuals that the GICHD interacts with is scattered in many lists, spreadsheets, systems (eg, conferences, trainings) and, most critically, in individuals' email boxes and notes.  This is arguably the most important dataset that the Centre should have for coordination and institutional memory, and it simply does not exist in a reliable format.

The GICHD is largely a "Microsoft shop" using corporate tools for collaboration, digital workplace services and financial accounting from the Microsoft suite.

## Desired System and Services

This request for offers seeks software and implementation services to equip the GICHD with a platform to manage information about its projects, results and constituents; specifically:

1. Software-as-a-service subscription;
2. Implementation services (including project management) to gather requirements, define processes, configure the system and migrate historical data;
3. Change management services to train staff and prepare power users/administrators; and
4. Ongoing maintenance and support.

### High Level Requirements

The GICHD is looking to use this system for:

1. Project Tracking
   a. Ability to maintain a portfolio of projects.
   b. Ability to plan and track the activities and schedule of each project.
2. Results Based Management (see further detail in Annex 1)
   a. Ability to establish indicators, set targets and record results.
   b. Ability to organise objectives and outputs within the context of a logframe.
   c. Ability to link results to financial expenditure, by integrating data from the accounting system.
3. Constituent Relationship Management (see further detail in Annex 2)
   a. Ability to store and retrieve information about the organisations and individuals the GICHD works with.
   b. Ability to track formal and informal interactions, event attendance and other activities.

The GICHD also views the following as important considerations:

1. Reporting and Analytics
   a. Ability to create custom reports using various filters and criteria.
   b. Ability to create dashboards for key indicators.
   c. Ability to export reports and data to formats such as Excel, PDF or CSV.
2. Forms and Workflows
   a. Availability of configurable workflows to submit/review/approve processes such as setting targets and recording results.
   b. Logging every step of approval workflows.
   c. Ability to configure fields to fit various of various teams and functions.
   d. Data cleansing and deduplication mechanism to maintain high quality data.
3. Integration
   a. Integration with Microsoft Office 365 such as, but not limited to, logging constituent interactions directly from emails.
   b. Integration with financial system, if necessary (current financial system is Microsoft Navision 2017; anticipating upgrade to Microsoft Dynamics 365 Business Central in late 2025).
   c. Integrate TYPO3 forms with the CRM to automatically capture the contacts from the GICHD websites and the online training portal registration.
   d. Ability to import data from configurable webforms (such as Microsoft Forms or similar).
   e. Availability of APIs for other custom integrations if necessary.
4. User Interface and Accessibility
   a. Intuitive user interface that is easy to navigate.

     b. Compliance with accessibility standards for users with disabilities.
     c. Access via web and mobile.
5. Data Protection
     a. Data classification
     b. Encryption of sensitive personal data.
     c. As a Swiss based organisation, the GICHD's systems and where its data is processed/transmitted must comply with Switzerland's Federal Act on Data Protection.
6. Security
     a. The GICHD uses Active Directory for single sign-on, including multi-factor authentication, and expects to extend such SSO and MFA to this system.
     b. Role-based access control and user permissions.
     c. Backup and Recovery: Regular data backups and disaster recovery plans.
7. Support and Training
     a. Availability of user training programs and materials.
     b. Access to customer support (helpdesk, phone, email) and service level agreements (SLAs).

## Activities and Timeline

The following activities and high-level timeline is anticipated:

- Q3 2024 – partner selection and contracting
- Q4 2024 (subject to funding availability) – Q1 2025
  - Review existing processes, datasets and documentation to understand the context
- Q1-Q2 2025
  - Design, configure and integrate selected software
  - Define and implement a change management plan to train staff and ensure successful system adoption
- Q3 2025
  - Migrate historical data
  - System rollout
- Ongoing
  - Provide system support

The timeframe and content of the project that the consultancy will support may be subject to change.

## Specific Knowledge, Experience and Qualifications

All of the following qualifications are required for this engagement:

1. The service provider must have proven experience and competence implementing software for projects, results and constituents at similarly sized organisations.
2. The consultant must have expertise in:
   a. The proposed software offering
   b. System implementation and integration
   c. System adoption and change management
3. The GICHD implements a Gender Equality and Inclusion Policy and commits to gender equality and inclusion as a criterion in the evaluation of consultant and supplier services.
4. The service provider must hold an independent position; in particular, they cannot be an employee of the Swiss Federal Administration, the GCSP, the GICHD or DCAF, or have been employed by these institutions within the past 24 months.

## Project Coordination

The GICHD's Results Based Management and Digital Communications Coordinators will jointly serve as the primary interlocutor. A task force will be formed to ensure needs of relevant stakeholders are represented in the project. Throughout the period of this engagement, the service provider will coordinate regularly with the GICHD to define, review and update assigned activities and schedules.

## Location

The majority of the work may be conducted remotely from the consultant's place of business. Travel to Geneva is expected periodically to facilitate project activities.

## Legal Requirement

Interested candidates/entities must provide a guarantee that they are registered as an independent legal entity. By applying to the tender, the applicant authorizes the GICHD to use their personal information to administer the tender and for internal purposes only. Such information will not be passed onto other parties without first obtaining the applicant's explicit written consent. For more information about data protection or the applicants' rights, see the GICHD's data protection notice.

## Proposal Format

Each applicant must submit the following:

1. A **technical offer** describing concepts, ideas, and methodologies that the service provider will bring to this engagement to provide the desired system and services enumerated above, including a **qualifications statement** specifying past performance and experience that explains the relevant subject matter expertise;
2. A **financial offer** specifying all costs, preferably in a modular format separating software/services for "constituents", "results" and "projects"; denote the one-time/setup fees and recurring fees. The service provider's daily fees and anticipated working days, travel costs, must be enumerated as well as any other relevant costs (costs for equipment such as laptops and connectivity are not covered by the GICHD);
3. Applicant's Gender & Diversity Policy;
4. Applicant's Environmental Policy;
5. Applicant's Data Protection Policy;
6. Curriculum Vitae of primary staff assigned to this engagement;
7. Two reference examples and their contact details; and
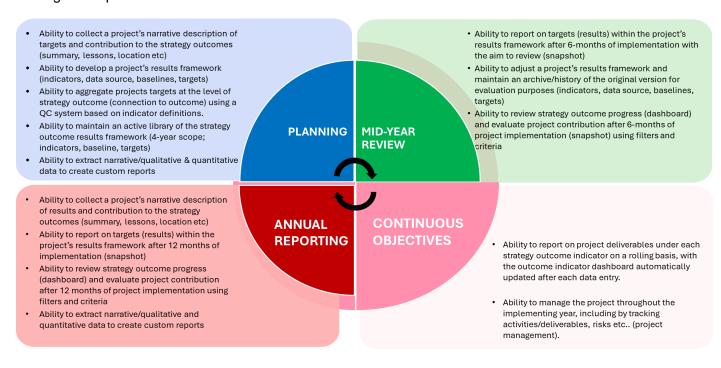8. Proof or registration as an independent legal company.

Successful applicants may be contacted to clarify details of their proposal and discuss specific contractual matters following the deadline for submissions.

All applicants will be contacted and informed of the status of their applications.

# Annex 1

The GICHD is interested to learn about how the proposed system may reflect good practices and accrued experiences of organizations that have adopted the software for monitoring & evaluation / results-based management.  This notwithstanding, the GICHD considers the following important to its results-based management practices:

**PLANNING**

- Ability to collect a project's narrative description of targets and contribution to the strategy outcomes (summary, lessons, location etc)
- Ability to develop a project's results framework (indicators, data source, baselines, targets)
- Ability to aggregate projects targets at the level of strategy outcome (connection to outcome) using a QC system based on indicator definitions.
- Ability to maintain an active library of the strategy outcome results framework (4-year scope; indicators, baseline, targets)
- Ability to extract narrative/qualitative & quantitative data to create custom reports

**MID-YEAR REVIEW**

- Ability to report on targets (results) within the project's results framework after 6-months of implementation with the aim to review (snapshot)
- Ability to adjust a project's results framework and maintain an archive/history of the original version for evaluation purposes (indicators, data source, baselines, targets)
- Ability to review strategy outcome progress (dashboard) and evaluate project contribution after 6-months of project implementation (snapshot) using filters and criteria

**ANNUAL REPORTING**

- Ability to collect a project's narrative description of results and contribution to the strategy outcomes (summary, lessons, location etc)
- Ability to report on targets (results) within the project's results framework after 12 months of implementation (snapshot)
- Ability to review strategy outcome progress (dashboard) and evaluate project contribution after 12 months of project implementation using filters and criteria
- Ability to extract narrative/qualitative and quantitative data to create custom reports

**CONTINUOUS OBJECTIVES**

- Ability to report on project deliverables under each strategy outcome indicator on a rolling basis, with the outcome indicator dashboard automatically updated after each data entry.

- Ability to manage the project throughout the implementing year, including by tracking activities/deliverables, risks etc.. (project management).

## Annex 2

The GICHD is interested to learn about how the proposed system may reflect good practices and accrued experiences of organizations that have adopted the software for constituent relationship management. This notwithstanding, the GICHD considers the following important to its CRM needs:

- Contact Management (institutional donors, events and workshops contacts and registration, training registration, newsletters subscribers, and media contacts):
    - Record and organise contacts in one centralised location including the contact source and relationship with the GICHD.
    - Maintain detailed records of contacts' interactions, preferences, and history (events attendance, training, sector, etc.)
    - Managing consents and communication preferences.
- Communication Automation:
    - Campaign management: plan, execute and analyse communications campaigns across various channels.
    - Email marketing: create, send, and track email communication campaigns.
    - Segmentation and targeting: Classify contacts based on various criteria for more focused and targeted communications messages and efforts.
    - Survey tool to collect and analyse target audiences' feedback through surveys and questionnaires.
    - Integration with the GICHD's social media channels.
    - Subscribe to newsletters via the website, and this subscriber data should be integrated with the CRM.
- Event management:
    - Event planning and management including registration, attendance tracking and follow up communications.
    - Full event attendance history logged per individual/organisation record.
    - Searchable calendar of events.