REQUEST FOR INFORMATION

I.   **PROJECT TITLE**: Design and development of Heifer International's Integrated Program Management System (IPMS)

II. **STATEMENT OF NEED:** This is a Request for Information (RFI) only and does not constitute a commitment, implied or otherwise. The information gathered from this RFI will allow Heifer International (Heifer) to better understand the market landscape of potential vendors. Heifer will be responsible for any costs incurred in furnishing this information.

Heifer International is in processes of globally standardizing its Program Management System (IPMS), which will integrate project management (PM), monitoring, evaluation, and learning (MEL), and collaborating, learning and adapting (CLA) processes. The IPMS will be a cloud-based system aiming to assist project teams to make informed programmatic decisions and to manage project scope, schedule, and budget for optimum impact.

This RFI is being used to gather market research for Heifer to assist with making decisions regarding development of its IPMS. Therefore, Heifer is seeking information from vendors who can design solutions and support a system that improves efficiency in project planning, implementation, data collection, monitoring, learning, and reporting. The system will be agile and dynamic to respond to multiple donor requirements, integrate with current systems and better position Heifer for fundraising activities. The vendor will be selected based on a competitive procurement/RFP process. The expect timeline in the RFP will be:

Phase one (approximately 2 months)	Discovery and assessment of Heifer's minimum viable product (MVP) that will be followed by a detailed proposal for the recommended system and costs
Phase two (approximately 2 months)	Adjustment of tools, templates and guidelines reviewed in phase one. Process flow development.
Phase three (approximately 4 months)	Software creation and pilot implementation of the system based on the MVP with an adjustment period of the system.
System support including progressive improvements	Additional surge support for continued developed of system components

Potential system requirements are:

MEL	Create, read, update, delete (CRUD) the Results Framework (RF) for a project
	CRUD of Result Indicators per project (Indicator Performance Tracking Table IPTT) and globally
	Update and report of project progress against targets (based on indicators)

	Creation of dashboards to show project status based on Scope, Schedule and Budget
CLA	Track CLA checklists for status up-dates on learnings and adaptations to project implementation following the CLA calendar;
	Integrate with documentation repository for CLA templates and forms for project use per calendar requirements
Project Management	CRUD of Work Plan based on the Results Framework of the project
	Update and track progress of the annual Work Plan that is integrated with the RF, IPTT, the Intermediate Result Based Budget, and MEL reporting calendar;
	Update and track MEL, Financial, CLA, donor reporting calendars
Finance	Integration with financial system to received project budget and actual expenses data
	Integrate offline Activity-based budget to electronic Intermediate Results Based Budget (IRBB) with scope (RF and IPTT) and schedule (Work Plan) of a project within the IPMS
Flexibility	Option for libraries of customized forms to be replicated and used within and between projects
	Integrations of projects at the program level, then integrate programs at the portfolio level. Aggregation for reporting.
	Off-line templates that can sync to the cloud-based system and be up-loaded. Work in low bandwidth. Accessibility.
User Management	User interface that allows for creation of a user and assignment of credentials, ability to create user groups, user roles per project and detailed access
	Support users in Latin America, Africa and Asia
	Provides multilanguage feature with English, Spanish and French
	Partner access with limitations. Donor access as dashboard of aggregated project information and results.
Integrations	System needs to support workflow integrations and exchanges of information.
	Integration with CRM, documentation, and data collection systems

Heifer will use the results of this RFI to determine interest that may lead to selecting of specific organization to receive an RFP for the full scope of the development of Heifer's IPMS.

III.   **BACKGROUND**: Heifer International is committed to ending hunger and poverty in a sustainable way by investing in farmers and business owners around the world, through implementing international development projects in 21 different countries. 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. The organization has committed to streamline the process of managing projects for quality

outcomes and impact and align to higher level of effectiveness industry standards. Therefore, the IPMS will be a state of the art, industry standard PM (scope, schedule and budget), MEL and CLA system that 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.

IV.   EXISTING TECHNOLOGY ENVIRONMENT
Heifer's current core global systems include the following.
- 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, payroll, procurement, document archive and fixed asset accounting. Agresso is the system of record for all of Heifer's financial data and reporting.
- Laserfiche is Heifer's global enterprise content management system that provides a system of record for digital documents, content and forms. Business processes, forms and approvals can be customized, streamlined and automated using Laserfiche forms and workflow to reduce use of paper forms and lengthy approval times.
- 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.

V.   QUALIFICATIONS:
- At least 10 years' experience developing and implementing state of the art systems for international development organizations with high level of integrations and sound security.
- Qualified personnel with software development skills in project management, project monitoring, and financial systems
- Available time commitment and staffing to complete the project within a year from contract signing

VI.   INFORMATION REQUESTED:
Whenever possible, respondents are asked to draw their response from objective, empirical, and actionable evidence; as well as cite this evidence within the response. Heifer is particularly interested in lessons learned from vendor's previous experiences in designing and building similar systems. Heifer is open to existing systems that can be configured to meet our needs. Heifer will draw upon the responses in creating the full Request for Proposal.

- Additionally: Submit 5 description briefs of past systems developed.
- Submit 5 references and contact information.
- Budget
    o General estimate cost of the phases
    o Provide product license costs if available

      o Provide option for surge system support including progressive improvements and new features

VII.   **CLOSING TIME FOR RESPONSE**
Due June 19, 2020 at 5 pm CST

VIII.   **SUBMISSION OF RESPONSE**:
All submissions must be electronic to the email address Programeffectiveness@heifer.org