Terms of Reference
Platform Development for Grant and program management
Since 2014, the Mediterranean Cooperation Centre of the International Union for Conservation of Nature (IUCN-Med), based in Malaga, Spain, has provided support to North African civil society organizations (CSOs) for the implementation of biodiversity conservation projects. IUCN-Med currently manage 2 programs: PPI OSCAN and TransCap. Theirs objectives are:

1. To support projects implemented by CSOs on the basis of calls for projects
2. To provide continuous capacity building
3. Disseminating results nationally and regionally

Eighty associations have already benefited from the PPI OSCAN program from 2014 to 2021. A 3rd phase has just started (2021-2025) which will support around 40 CSOs and new projects lasting from 18 to 30 months in Algeria, Libya, Morocco and Tunisia.

The TransCap program, implemented in Morocco and Tunisia, is currently supporting six projects lasting 12 months and a new call for 6 new projects has already been launched in May 2022.
IUCN-Med wishes to promote its management approach for its programs supporting CSOs, in particular through better management of the flow of information and exchanges between IUCN and candidate and beneficiary CSOs (Grantees), from the call for projects and receipt of proposals, through the selection and technical and financial reporting phase to the project closing phase for beneficiary CSOs, including images and videos produced by CSOs.

For accomplishing this, IUCN-Med is looking for a web development company which is able to:

- Design and develop a tailor made solution for Grant and program management
- Or to integrate and customize with some existing applications.
Platform
Main Tools
Expectation

- **Users:** To create Project / IUCN teams / Grantees Teams (CSOs) with different levels of users and permissions.

- **Media content Management:** To cap photos and videos upload.

- **Formatted content:** Build pre-formatted forms, documents to ease Grantees reporting

- **Milestones and timeline:** Define steps completion architecture within the platform that will allow to avoid email communications.

- **Automated communication:** use automated email notifications, reminders, calendar for events.

- **Reporting:** Customize Build pre-formatted reports based on forms that will allow to ease the fulfilment for the CSOs.
Grant Project Workflow
WORKFOW PPI OSCAN

A

APPLICATIONS

1. Submit Proposal (short concept)

2. Classification by code and Country

3. Assessment and Pre-selection

B

GRANT AGREEMENTS

1. Submit detailed Proposal (Full Proposition Budget A and B)

2. Regional Committee Decision making

3. Communicate specific decision

4. Preparation and Signature of convention with selected CSOs

5. Complete Due Diligence


7. Signature convention

C

PROJECT MANAGEMENT

1. Submit installment request 1

2. Payment Installment 1

3. Submit Tech&Fi report 1

4. Report Checking Tech&Fi 1 (Exchange adjustment reports + Final validation)

5. Submit installment request 2 (+ Provisional Budget month+6)

6. Payment Installment 2 (Report T&F 1)

7. Submit Tech&Fi report 2

8. Report Checking Tech&Fi 2 (Exchange adjustment reports + Final validation)

9. Submit installment request 3 (+ Provisional Budget month+6)

10. Payment Installment 3

11. Submit Tech&Fi Final report

12. Report checking Tech&Fi Final

13. Final Validation

D

FINAL REPORTS & CLOSING

1. Submit final instalment (10%) request

2. Payment Final installment

3. Closure of final reports for funders

LifeCycle: 3 Years

IUCN-Med ACTIONS

OSC ACTIONS

PROJECT SUBMISSION
WORKFLOW TransCap

A
APPLICATIONS
1. Submit Proposal (Detailed concept)
2. Classification by code (Tcp1) and Country
3. Assessment and Pre-selection

B
GRANT AGREEMENTS
2. Complete Due Diligence
3. Bank Certificate + Admin Documentation
4. Signature convention

C
PROJECT MANAGEMENT
1. Submit installment request 1
2. Payment Installment 1
4. Report Checking Tech&Fi 1
6. Payment Installment 2
8. Report checking Tech&Fi 2
9. Final Validation

FINAL REPORTS & CLOSING
1. Submit final instalment (10%) request
2. Payment Final installment
3. Closure of final reports for funders

OSC ACTIONS
IUCN
IUCN - Med ACTIONS

PROJECT SUBMISSION
LifeCycle: 1 Years
Grant Project Management -
Main Features
Platform
Main Features for Grantees (CSOs)

The Grant project workflow for the CSOs users is divided into 4 steps:
- A - The CSOs applications
- B - Grant Agreements
- C - Project Management
- D - Final reports and closing

All the platform requirements are listed below according to each step of the project workflow.

<table>
<thead>
<tr>
<th>Requirements</th>
<th>Step</th>
<th>User story</th>
</tr>
</thead>
<tbody>
<tr>
<td>Register and create Account</td>
<td>A</td>
<td>CSOs user should register and complete a profile with mandatory fields.</td>
</tr>
<tr>
<td>Complete Proposal form</td>
<td>A</td>
<td>CSOs can access from its account to a form for submitting a short proposal</td>
</tr>
</tbody>
</table>
The **Step B** is dedicated to online Grant agreements. Documents has to be signed online and stored. The platform should be configured for sending automatic Emails for reminders and due dates for grant paperwork.

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<tbody>
<tr>
<td>Complete Proposal form</td>
<td>B</td>
<td>CSOs that is pre-selected can access from its account to a form for submitting a full proposal (Budget A and B)</td>
</tr>
<tr>
<td>Sign Due Diligence</td>
<td>B</td>
<td>Complete and sign online the due diligence</td>
</tr>
<tr>
<td>Complete Administration docs</td>
<td>B</td>
<td>Upload Administrative documents and Bank certificate</td>
</tr>
<tr>
<td>Sign Convention (Grant Agreement)</td>
<td>B</td>
<td>Review and sign grant agreement online. After validation of signature, the doc can be downloaded.</td>
</tr>
</tbody>
</table>
The **Step C** is dedicated to the project follow ups in its different phases with the corresponding technical and financial report. Key features needed for smooth process are:

- Creation of events / Activities
- Calendar and notifications on the CSOs dashboard
- Automated communications (reminders, add calendar, auto responses)
- Media folder

The CSOs reporting space should be organise under 3 Folders/Tabs and subfolders:

- Technical reports (Intermediate and final subfolders)
- Financial Reports
- Media

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</tr>
</thead>
<tbody>
<tr>
<td>Submit installment request</td>
<td>C</td>
<td>From a model the CSOs submit an instalment request 1, 2, 3 ...</td>
</tr>
</tbody>
</table>
## Platform Main Features for Grantees (CSOs)

<table>
<thead>
<tr>
<th>Requirements</th>
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</tr>
</thead>
<tbody>
<tr>
<td>Submit Technical report</td>
<td>C</td>
<td>From a model the CSOs submit a technical report phase 1, 2, 3 … This has to be linked to an instalment request. Allow to submit forms and upload docs, pictures and videos.</td>
</tr>
<tr>
<td>Submit Financial report</td>
<td>C</td>
<td>According with the initial budget tables, the CSOs needs to the complete the budget for the engaged activity corresponding to the phase of the project. In addition they need to fill in the staff cost and equipment expenses. The data corresponding to phases 1, 2, 3 of the financial report need to be compared and match with the initial budget.</td>
</tr>
</tbody>
</table>
| Submit media content       | C    | For each event/Activities corresponding to the different phases of the project, the CSOs will upload pictures and Videos on a Media folder. Rules per upload :  
• Each upload is attached to an event  
• Each upload have a capping (10 or x pictures / Videos max.) |
The **Step D** is dedicated to online Grant agreements. Documents has to be signed online and stored. The platform should be configured for sending automatic Emails for reminders and due dates for grant paperwork.

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</tr>
</thead>
<tbody>
<tr>
<td>Submit Final installment request</td>
<td>D</td>
<td>From a model the CSOs submit a final instalment request.</td>
</tr>
</tbody>
</table>
The Grant project workflow for the managers of IUCN-Med is divided into 4 steps:

- A - The CSOs applications
- B - Grant Agreements
- C - Project Management
- D - Final reports and closing

All the platform requirements are listed below according to each step of the project workflow.

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<tr>
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</tr>
</thead>
<tbody>
<tr>
<td>Customized forms</td>
<td>A</td>
<td>Manager can create a form for the short proposals with the following attributes: Name, typology (Form1, 2, ...), Program (PPI OSCAN, TransCap...)</td>
</tr>
<tr>
<td>Requirements</td>
<td>Step</td>
<td>User story</td>
</tr>
<tr>
<td>------------------------------------------</td>
<td>------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Applications screening with preselection process</td>
<td>A</td>
<td>Receive application forms (which are associated to an CSOs account) in a main reception queue. The manager should operate the following tasks: Task 1: Classification application by code and country Task 2: Reviewers complete an assessment form Task 3: Add a status (under review, pending decision ...) Task 3: Attributing final status: rejected or pre-selected</td>
</tr>
<tr>
<td>Project validation</td>
<td>B</td>
<td>Communicate email/notification that the project is validated by committee. Activation the project to the next level.</td>
</tr>
<tr>
<td>Installment payment</td>
<td>C</td>
<td>By receiving the instalment request within the application: set reminders for payment, status of processing the payment of installment.</td>
</tr>
<tr>
<td>Requirements</td>
<td>Step</td>
<td>User story</td>
</tr>
<tr>
<td>--------------------------------------</td>
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<td>-------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
</tbody>
</table>
| Shared folders management            | C    | Create folders for the different reports and follow-ups within the application (e.g. Technical reports, Financial reports, Media...). Inside each folder creation of sub-folders corresponding to:  
|                                      |      | • Global workflow (report 1, 2, 3 ...)  
|                                      |      | • Events/Activities  
|                                      |      | • Themes ("Activités terrains", "Sensibilisation et formation", "Réunion et mise en réseau"...)  
|                                      |      | Permissions management:  
|                                      |      | • CSOs user (grantees) can edit documents, but cannot delete after saving it.  
|                                      |      | • Grant Manager: can create new, edit, delete.                                                                                                                                                                                                 |
| Create project milestones and reminders | C    | Assign as many grant follow ups as needed on a grant program. Only completion of each grant follow-up (report + paid installement) triggers the next step. |
## Platform Requirements for Managers (IUCN-Med)

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</thead>
<tbody>
<tr>
<td>Create Surveys</td>
<td>C</td>
<td>Create surveys, questionnaires at different steps of the grant program. Create a data report from the answers of the surveys. Make it mandatory or not for a step completion.</td>
</tr>
<tr>
<td>Communication within the application</td>
<td>C</td>
<td>The manager team need to communicate with the application via email, notifications, calendar reminders and keep a track record all along the project journey. Communication is used between manager and grantee also for commenting and adjusting reports before validation.</td>
</tr>
</tbody>
</table>
| Validation process rules                  | C and D | Creating validation rules for each step of the projects. Rules:  <ul>  
• Partial/Final validation (validation per type of report (Technical, financial...))  
• Multiple manager validation  </ul>|
The Administration side of the application should managing set ups and configuration for 2 type users:

- A - CSOs Applicants
- B – IUCN-Med managers and Teams

IUCN-Med expects to customize the reports and analytics (KPIs) in the Admin side.

To be considered within the global platform is also:

- Additional language for the front end (Number and language has to be defined)

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</thead>
<tbody>
<tr>
<td>Managing CSOs user account</td>
<td>Create or Activate CSOs account registration. Create child users for each account</td>
<td></td>
</tr>
<tr>
<td>Managing Managers account</td>
<td>Create a team accounts and child users need to be linked to 1 or several teams. Assign a role to users and permissions to users (e.g. different level of validation permission).</td>
<td></td>
</tr>
<tr>
<td>Requirements</td>
<td>Step</td>
<td>User story</td>
</tr>
<tr>
<td>--------------------------------------</td>
<td>----------------------------------------------------------------------</td>
<td>----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Managing Team Workflow</td>
<td></td>
<td>Defining Grant workflow for each team. Grant workflow is the number of steps that are mandatory to complete in the application journey (A+B) and in the project management Journey (C). In Application journey, the steps that can be added are submitting different proposals and communication and decision making steps.</td>
</tr>
<tr>
<td>Create report templates</td>
<td></td>
<td>Create templates for all type of docs: application forms, technical reports, financial reports, surveys / Questionnaires...</td>
</tr>
<tr>
<td>Reports and analytics series</td>
<td></td>
<td>Collect all programs/projects data and build different type of reports on a dashboard such as: Grant payment details, Grants balance report, grant completion reports, survey reports ...</td>
</tr>
</tbody>
</table>
### Platform

**Main Features for ADMIN**

(IUCN-Med)

<table>
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<tbody>
<tr>
<td>Reports and analytics series</td>
<td></td>
<td>More specifically, reports and analytics should be customized under 2 main categories:</td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>Financial:</strong> With the following indicators: disbursement rate (global, per activity, per budget line), payment rate (Global programs, per project, per country)</td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>Project performances:</strong> With the following indicators per project and global: Project completion rate, Events completion rate, total training completed, total workshop completed, total trees planted, Total hectares restored, Total actions carried out in protected areas, Total project involved in endangered species, Total project that contributed to creating a Data Base on endangered species (Fauna), Total conservation-related economic activities created</td>
</tr>
<tr>
<td>Requirements</td>
<td>Step</td>
<td>User story</td>
</tr>
<tr>
<td>----------------------------------</td>
<td>------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Reports and analytics series</td>
<td></td>
<td>• Project performances:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>With the following indicators per project and global:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Total development and management plan created, Total technical and financial</td>
</tr>
<tr>
<td></td>
<td></td>
<td>partnerships signed during the project, Total application new projects, Total</td>
</tr>
<tr>
<td></td>
<td></td>
<td>application new projects, Total awards won.</td>
</tr>
</tbody>
</table>
Submission criteria & deadlines
Profile of bidders

- IT companies and Grant management system integrators.

Selection criteria

- Experience in customising or integrating grant management systems, Time of delivery in 2022 and the financial proposal.

Time Schedule

- The assignment shall be expected to be completed no later than December 31st, 2022.
Applicants should submit the following by email to uicnmed@iucn.org (cc: maher.mahjoub@iucn.org) before 28 June 2022, 23.59 UTC+2 (Madrid Time):

- A curriculum vitae including highlighted references to previous relevant work and publications;
- A covering letter outlining their suitability for the job, providing initial observations on the ToRs and an outline of the methodology they would use;
- A financial offer in Euros\(^{(1)}\) for completion of the required tasks, including the daily rate used for calculations.

\(^{(1)}\) IUCN in Spain is not subject to the reverse charge VAT system. For this reason, the invoice must have a certificate explaining why the VAT is not included in the total to be paid. If this service is exempt from VAT in the country of the consultant, the latter must add the reference of the law in force explaining this exemption. If not, VAT must be added to the invoice or indicate in the total that all taxes are included.
THANK YOU