International Rescue Committee, Inc.
Request for Proposal of Services:
A Web browser-based Commodity Tracking System

Proposals Due: March 24, 2014  IRC Reference: 272245

The contents of this Request for Proposal (RFP) as well as any subsequent communication between the International Rescue Committee (IRC) and the Provider are to be treated as confidential and are not to be distributed or shared without prior written authorization from IRC’s Authorized Representative.

STATEMENT OF WORK AND TERMS OF REFERENCE

1. BACKGROUND

International Rescue Committee (IRC) responds to the world’s worst humanitarian crises and helps people to survive and rebuild their lives. Founded in 1933 at the request of Albert Einstein, the IRC offers lifesaving care and life-changing assistance to refugees forced to flee from war or disaster.

At work today in over 50 countries and in 22 U.S. cities, the IRC restores safety, dignity and hope to millions who are uprooted and struggling to endure. The IRC leads the way from harm to home.

2. RFP/PROJECT OBJECTIVES

IRC has built a remote verification and monitoring system in order to track and report on the movement of goods to ensure that the intended beneficiaries receive them. Due to staffing and lack of access in some of the places we work, the monitoring system makes use of creative remote monitoring methods (such as mobile data collection, QR coding and GPS mapping) that integrates with a Web application for administration, management and reporting on the status of shipments. This system is known as the Commodity Tracking System (CTS), and is roughly analogous to the systems of well-known freight carriers like DHL, UPS or FedEx, though greatly simplified.

Remote Verification Strategy
Due to continually changing access to various locations in which the IRC works as well as the desire to work through local partnerships, a multi-tiered verification strategy is employed. The objectives of this strategy are:

- Verify the handover of goods to the transporting organization;
- When possible, track the movement of shipments (packages) from an IRC warehouse to a final destination;
- Verify the receipt of goods by the target recipient (via electronic data capture & transfer).
Methodology
There are multiple methods of remote monitoring that have been employed during this project:

1. Transporters use smartphones with customized electronic forms to scan package QR codes affixed to packages to periodically record their location, and the End User affirms/denies shipment has arrived via email, Skype &/or other means.
2. End Users use smartphones with customized Kobo/ODK forms and QR codes to scan shipments upon arrival.
3. Weekly End-User check-in via e-mail or Skype.

All methods must link into a single database for ease of monitoring and reporting.

The IRC wishes to engage the services of a software engineering firm, the ‘Provider’, for the purpose of developing the next generation of the Commodity Tracking System (CTSv3), ‘the Project’.

A detailed CTS Specification and source code are available for Providers who wish to submit a proposal.

3. PURPOSES AND OBJECTIVES

Purpose:
To develop the next version of CTS, a Web-browser application. The current version is PHP-based; the next version shall be developed using the Django/Python framework.

The application must be easily deployable as a cloud-hosted, Web-based application on a well-known managed-service provider.

It must support conventional data input and output (CSV, Excel) as well as digital information gathering tools, such as ODK\(^1\), KoBo\(^2\) and – potentially – RapidSMS\(^3\). It will need to provide a RESTful Web Services interface in order to communicate with existing and future applications.

IRC is looking for a Provider to:

- Design, develop, test and document a Web browser-based platform with granular security to accommodate multiple views depending on user role, and includes the development of a RESTful Web Service interface in addition to the UI.
- Support existing open-source Android and standalone browser client mobile data collection tools (e.g. ODK Collect).

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1 Open Data Kit is an open source mobile data collection technology. See: http://opendatakit.org/
2 KoBo is an open source mobile data collection technology. See: http://www.kobotoolbox.org/
3 Rapid Short Message Service, see: http://www.rapidsms.org
Key outputs per Phase as envisioned in the IRC Project Proposal:

<table>
<thead>
<tr>
<th>Phase One: Software development and testing</th>
<th>I</th>
<th>Design, develop, test and document a Web-based CTS platform</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>II</td>
<td>Design, develop, test and document the migration of the existing CTSv2 database to the new Web-browser based application (CTSv3)</td>
</tr>
</tbody>
</table>

| Phase Two: Deployment and distribution | I | Implement a deployment plan to a cloud-based hosting provider, such as Amazon, Google, Heroku, etc., including data migration, ODK interoperability, communications materials and documentation of software and processes. |

It is *critical* that all developments made by the Provider be capable of being shared under open source license in order to allow IRC to share and reuse the software as it pleases. This does not apply to branded elements such as logos, photos or images. (UNICEF’s RapidSMS project is a good example.)

4. SCOPE OF WORK

The selected Provider will undertake the following activities:

A) Client relations & project management
B) Software development
C) Documentation
D) QA deployments
E) Distribution and deployment plans
F) Data migration from old systems/transition
G) A comprehensive risk analysis/mitigation strategy

5. IRC RESPONSIBILITIES

- Availability for consultation, technical and project discussions, daily meetings, and a general project coordination support.

6. EXPECTED DELIVERABLES AND TIMELINE

<table>
<thead>
<tr>
<th>Deliverable</th>
<th>Time line</th>
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<tbody>
<tr>
<td>Project Management:</td>
<td>Minimum once per week</td>
</tr>
<tr>
<td>Collaborate with IRC Project Coordinator(s) on regular basis.</td>
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</tbody>
</table>
Response to IRC regarding impact to timelines for change or feature requests after project start | Within three days of request
---|---
Weekly reports on system status, software improvements and added features and technical analysis (template to be provided) | Weekly during Phase 1
Regular risk management / analysis reports (minimum one page) | Monthly during Phase 1

**Software Development (General):**

| Software Development Process Documentation | Throughout Phase 1
---|---
Full unit tests | Routinely, as process requires
Automated build, deploy and test scripts | Routinely, as process requires
User Acceptance testing of all component systems | Routinely, as process requires

**Software Development (Specific):**

| Develop CTSv3 | Within 6 months of contract issuance
---|---
Finalizing all major code and documentation, including tests, four (4) weeks prior to completion of contract for review, questions and fixes. | Four weeks prior to completion of contract

**Training, Deployment and Rollout:**

| Deployment and software support plan completed at least one month prior to the end of Phase 1 | Four weeks prior to completion of contract
---|---
Training materials for deployment, monitoring and troubleshooting for tech admins | Four weeks prior to completion of contract
Training materials for users | Four weeks prior to completion of contract
Rollout strategy for all platforms and deployment mechanisms, including mobile devices, locally and globally managed cloud-hosted instances. | Four weeks prior to completion of contract

7. KEY SKILLS, TECHNICAL BACKGROUND, AND EXPERIENCE REQUIRED

We are looking for a Provider with the capacity to work collaboratively with IRC on a project using mobile and Web technologies. The Provider should have the following skills:

- **Experience building large, highly customized solutions with assistance from reusable apps**
- **Experience with agile best practices**
- **Experience with scaling problems and solutions**
- **Experience with internationalization**
- **Experience building Web-based multitenant applications**

Team size and composition may vary depending on the approach taken. The Provider
should clearly outline their proposed team structure and provide specific details on each member, including CV. This outline must demonstrate that the Provider has the human resources and capacity to meet the deliverables provided within the Expected Deliverables and Timeline section.

The Provider must have experience with distributed open-source projects using Python, Django, HTML5, Web Services, and document and object-oriented databases using Agile development practices. Specifically, the Provider should explain their philosophy and provide pertinent examples showcasing their work with regard to the following:

- **Implementation of Django/Python community best practices and standards (e.g. virtual environments; PEP8 compliance; reusing existing Django applications)**
- **Unit test coverage, automated builds and deployment**

8. DURATION

The work is planned to start as soon as possible. Based on a typical request for proposal process, IRC anticipates awarding the contract no later than April 2014. Although IRC acknowledges that the duration for different approaches to this solution may vary, based on initial project scoping we foresee the development life cycle of the applications to take between 2-6 months.

The tentative schedule of the contractual process is as follows:

<table>
<thead>
<tr>
<th>Contractual processes</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Confirmation from Providers to participate</td>
<td>07 March</td>
</tr>
<tr>
<td>Questions and clarification from Providers</td>
<td>14 March</td>
</tr>
<tr>
<td>Q&amp;A from IRC to be shared with all potential Providers</td>
<td>17 March</td>
</tr>
<tr>
<td>Technical and price proposals received no later than 23:59 NY time</td>
<td>24 March</td>
</tr>
<tr>
<td>Technical and Price evaluation completed by technical team</td>
<td>31 March</td>
</tr>
<tr>
<td>Anticipated Institutional/Corporate Contracts award date</td>
<td>18 April</td>
</tr>
</tbody>
</table>

9. EVALUATION OF PROPOSAL

IRC shall conduct regular assessments of the Provider’s performance. Results of the assessment will be shared with the Provider for discussion and possible corrective measures. At the end of the implementation phase, IRC shall assess the Provider’s ability to:

- Deliver in a timely manner
- Fulfil IRC’s requirements
- Advise IRC and recommend best practices
- Provide or recommend hosting solutions
- Perform Quality Assurance testing, Fix bugs and update the software
- Document key aspects of the system as well as deployment steps
- Address project management $/or communication issues
• Deliver any other service agreed upon.

Poor performance may result in the partial or total termination of the contract, at the discretion of IRC.

In making the final decision, IRC considers both technical and financial aspects. The evaluation team first reviews the technical aspect of the offer followed by review of the financial offer of the technically compliant Providers.

a. Technical Proposal (70 Points)
The technical proposal should address all aspects and criteria outlined in the Request for Proposal of Services. However, all these requirements represent a wish list from IRC. The Providers are free to suggest/propose any other solution. IRC welcomes new ideas and innovative approaches. Providers may be asked to provide additional information.

No price information should be contained in the technical proposal.

Ensure that the level of effort to be committed by the different team members in each phase is visible within the technical proposal. That same information with additional cost data should feature in the financial proposal.

The proposal should very clearly articulate how you propose to address key questions included in the PURPOSE AND OVERVIEW OF THE PROPOSED WORK section of RFP.

Keep in mind that the following specific items must be present, in addition to whatever other approaches and methods are proposed as per the requirements detailed above:

1. Information that will enable IRC to determine whether the Provider (or the Provider’s team) has relevant specialized knowledge in the areas that are critical to this work.

2. Information on any additional experience that may be critical to the success of the proposed work, including but not limited to: a) Affiliation to communities of practice; b) Any other information that the Provider deems relevant to this work that would give the Provider an advantage over others competing for the same contract.

<table>
<thead>
<tr>
<th>REF</th>
<th>CATEGORY</th>
<th>POINTS</th>
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<tbody>
<tr>
<td>TE1</td>
<td>Timeline with project Overview and Team makeup</td>
<td>15</td>
</tr>
<tr>
<td></td>
<td>• The summary CVs (maximum one page) and current titles (and links to public, open-source code repositories of developers, if available) of all proposed team members, and an acknowledgment that any changes to the team prior to or during the contract term will be subject to written approval by IRC after review of CVs, current titles and links to public, open-source code repositories, if available.</td>
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<tr>
<td></td>
<td>• A timeline, as detailed as possible, that includes:</td>
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<tr>
<td></td>
<td>- Project overview including analysis, development, testing, and delivery. It is understood that this may change and is not binding.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>- Person hours and roles necessary for each segment of the project</td>
<td></td>
</tr>
</tbody>
</table>
An indication of points on the timeline where an increase in person hours would lead to faster results.

**Project Management**
- Provide a short narrative (1 page or less) that explains how members of your team will coordinate with each other and the IRC project coordinator to produce the deliverables listed in the “Project Management” section of the Expected Deliverables and Timeline section. Include a skeletal calendar for a typical two-week period.

**Software Development**
- Provide a creative plan for completion of the project that reflects a thorough understanding of the requirements, annexed user scenarios and technologies involved. Make sure this plan touches on:
  - Testing philosophy
  - Plan the Web-based application for CTS
  - Plan the data migration from CTSv2 to CTSv3
  - Short narrative exploring how you’d build the different deployment and hosting options
- Two examples of code documentation from previous project (wikis, arch. diagrams, etc.)

**Training, deployment and rollout**
- 1 page describing deployment and support plans

**Communications pieces**
Successful bids will reflect an understanding of the importance of high-quality pieces and technical and non-technical documentation.
- 1 example or link to an example of previous communications pieces such as presentation decks, one-pager, or user manuals.
- 1 example or link to training materials (presentation deck, pdf cheat-sheet)

**Total Technical**

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<table>
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<tr>
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<tbody>
<tr>
<td>TE2</td>
<td>Project Management</td>
</tr>
<tr>
<td>TE3</td>
<td>Software Development</td>
</tr>
<tr>
<td>TE4</td>
<td>Training, deployment and rollout</td>
</tr>
<tr>
<td>TE5</td>
<td>Communications pieces</td>
</tr>
</tbody>
</table>

**Only proposals which receive a minimum of 50 points will be considered further.**

**b. Price Proposal (30 Points)**
The price proposal should be separate from the technical proposal. The price shall be broken down for each component of the proposed work, based on an estimate of time taken which needs to be stated.

The total amount of points allocated for the price component is 30. The maximum number of points will be allotted to the lowest price proposal that is opened and compared among those invited firms/institutions which obtain the threshold points in the evaluation of the technical component. All other price proposals will receive points in inverse proportion to the lowest price; e.g.:

\[
\text{Max. score for price proposal} \times \frac{\text{Price of lowest priced proposal}}{\text{Price of proposal X}} \]

**Price Proposal – Mandatory.**
Fees for providing the services laid out in this RFP.
Price Schedule – Mandatory.
  • Proposed payment schedule.
  • If applicable/offered discount payment terms.

The calculation of fees should indicate the all-inclusive cost in US dollars and an estimate of the time-effort to be allocated for the services, expressed in number of working days by designation of staff performing the service and their fees per working day. Estimates for other items required by output, if any, must be detailed and listed separately. Institutional overhead expenses must be indicated by a percentage of the total.

Due to the nature of the required services and expressed desire of IRC to adopt an Agile development methodology, we understand that preparing a comprehensive financial proposal for this project represents a challenge. Offerors are asked to break down their financial proposal according to the deliverables outlined in the Expected Deliverables and Timeline section. In order to guide this process, please see the sample table below. This is only a guide. The budget should be presented in three categories: personnel costs, project costs, overhead costs. Sub-headings within the categories may be done at offeror’s discretion.

All prices/rates quoted must be exclusive of all taxes as IRC is a tax-exempt organization.

<table>
<thead>
<tr>
<th>Total Price</th>
<th>30</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Technical and Price</td>
<td>100</td>
</tr>
</tbody>
</table>

The quotation will not be subject to revision unless officially invited to re-submit by IRC.

The Cost Proposal must include detailed item-wise quotations, based on the project narrative and other relevant documents.

**Deadline to submit the proposal is March 24, 2014.**

Providers shall submit their proposals and bids electronically to the following email addresses: semir.tanovic@rescue.org and GSCHD@rescue.org making sure that the subject line follows this pattern: IRC Jordan RFP ###272245## Your Company Name.

**Deadline for asking questions is March 01, 2014.**

Providers shall direct questions to: Semir Tanovic, Director, GSC semir.tanovic@rescue.org and copy GSCHD@rescue.org following this pattern in the subject line:
IRC Jordan RFP ###272245## Your Company Name Question About …

This communication protocol is important element of our record keeping, so IRC reserves the right to disqualified providers whose communication does not follow it.

**10. GUIDING PRINCIPLES FOR THE CORE PRINCIPLES FOR THE PROJECT**
The following principles should guide the work of the vendor through the implementation, customization, support and maintenance of the application. Vendors are encouraged to refer to these principles when developing their answers to the project requirements.

- **Security**: The security of the application and its ability to prevent malicious and unintended misuse is an absolute priority. Encryption should be used where appropriate. All communication between systems shall use SSL and/or certificates.
- **Usability**: Applications must be modern, intuitive, and easy to use. It should be built with accessibility in mind. Layouts and features should remain simple, consistent throughout, and to the point.
- **Scalability**: Application must be designed in such a way that it is possible to horizontally scale in the case of a hosted deployment.
- **Extensibility**: As much as possible, the system should be built to adapt to varying needs, diverse audiences, changing requirements based on user’s profile. This will be particularly important for the customizations of the product, as one should aim at developing reusable and adaptable features rather than one-time development for a specific project.
- **Connectivity**: IRC works all over the world, including the most isolated locations and in regions affected by disasters or conflicts. It is critical to develop solutions to ensure access to essential resources to as many users as possible when connectivity permits.
- **Self-sustainability**: It is expected that few human resources will be available to support the administration of the applications and support users. Therefore, it is critical to aim at designing systems and processes that are as self-sustainable as possible. This implies for example the creation of automation, communication templates, workflows, reliable technology, FAQ, inline help and self-training solutions.

**11. ADMINISTRATIVE**

1. The IRC reserves the right to accept or reject any or all bids and to accept the bid deemed to be in the best interest of the IRC and is not bound to accept the lowest price bid submitted.

2. The IRC reserves the right to negotiate pricing with the selected Provider.

3. This RFP, together with any other documents required herein, shall be included in the final contract.

4. The IRC reserves the right to select as many Providers as it deems appropriate and is under no obligation to purchase any services of a particular Service Provider until a contract has been signed.
5. All costs related to the preparation and submission of this RFP shall be borne by the Provider. Under no circumstances shall the IRC be liable for any costs.

6. The Provider's submitted proposal must be valid for acceptance by the IRC for a period of 90 days from the due date set for RFP receipt.
ANNEX 1. INFORMATION ABOUT THE PROJECT

<table>
<thead>
<tr>
<th>Information about the Project</th>
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<tbody>
<tr>
<td>IRC's reference number</td>
</tr>
<tr>
<td>Project contract title</td>
</tr>
<tr>
<td>Country</td>
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<tr>
<td>Start date of the Project</td>
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<tr>
<td>End date of the Project</td>
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