REQUEST FOR TENDER FOR:

Exploring tools and software to strengthen impact reporting process

Document release date: 12 September 2023
Return date: by close of business on 01 October 2023

Address for return of documentation:

by email to Irina Dioguardi, irina.dioguardi@fauna-flora.org
## CONTENTS

ABOUT THE PROJECT ................................................................. 3

CONTRACT REQUIREMENTS .......................................................... 4

PROJECT LOCATION .................................................................... 5

TENDER PROCESS AND TIMETABLE ........................................ 5

TENDER ASSESSMENT CRITERIA .................................................... 6

TENDER CONDITIONS ................................................................. 6

TENDER INFORMATION REQUIREMENTS .................................. 8
About the project

The Opportunity

Fauna & Flora’s Conservation Design & Impact team have been implementing an annual impact reporting process to understand institutional conservation impact in any given year since the mid-2000’s. The process is bottom-up, based on aggregating project-level information from Fauna & Flora’s regional and cross-cutting teams. The process consists of several stages, and over time, these have evolved and adapted. The goal of this consultancy is to understand whether there are efficiencies which can be made within each stage of the process, or the process as a whole, in order to increase its effectiveness and our ability to tell impactful conservation stories for a range of audiences. This might be through employing technological solutions, or through improvements in existing processes. This consultancy is an information gathering process, and the information generated by the consultants will provide recommended options to consider, enabling Fauna & Flora to make decisions about the future direction of its impact reporting process.

The stages of Fauna & Flora’s impact reporting process include:

1. Data collection: each project team completes a word document annual report form (Fauna & Flora has approx. 120 projects in total)
2. Data entry and qualitative analysis: a team of 10-15 analysts review each report and enter data into Survey123 form
3. Data validation: an Excel is exported from Survey123, and a team of 3-5 reviewers validate data, remove duplication, and check for consistency
4. Report writing/extracting key datapoints: the Conservation Impact Report is written using figures and impact stories from the data generated
5. Dissemination: data from the Excel is shared internally with relevant teams, and the Conservation Impact Report is disseminated. We are exploring mechanisms of sharing meaningful year-on-year data.

Fauna & Flora is seeking to contract a number of different consultants for this opportunity from across a range of different sectors and backgrounds (including those within and outside the conservation sector), in order to maximise learning and ensure we are basing our decisions on a wide range of options.

We are interested in hearing from those who are experienced in developing or supporting the implementation of new and transformative systems within organisations.

At the beginning of the consultancy period, Fauna & Flora will:

- Hold an inception meeting to share key information with the consultants (more detail provided in the “Contract Requirements” section below)
- Provide a sample of our existing data and datasets, from across each stage of the impact reporting process, including: annual reporting analysis excels, word document annual report forms, and outputs / products developed using information from the annual impact reporting process (e.g. Conservation Impact Report, project history documents, year on year documents etc.).

Fauna & Flora

Fauna & Flora works to saves species from extinction and habitats from destruction, while improving the livelihoods of local people. Our guiding principles are to work through local partnerships, act as a catalyst for change, make conservation relevant, and base decisions
on sound science. Founded in 1903, Fauna & Flora is the world’s longest established international conservation body; our conservation work, and impact, spans the globe.

This consultancy will be managed by Fauna & Flora’s Conservation, Design & Impact (CDI) team based at the headquarters in Cambridge, UK.

Fauna & Flora is committed to delivering high impact conservation work. Central to understanding the impact of our work at an organisational scale is Fauna & Flora’s annual impact reporting process. Fauna & Flora has an institutional approach to understanding impact which supports us in; planning our work, learning what is and is not achieving the expected conservation outcomes of our projects, and demonstrating and communicating success in our work (both at project and organisational levels). The Conservation Design & Impact team is responsible for leading Fauna & Flora’s annual impact reporting process. Fauna & Flora teams and partners operate in different contexts with varying resources and capacities available, therefore our impact reporting process must take a bottom-up approach, accounting for these context-specific differences, and enabling meaningful aggregation of impact data.

This work will need to be delivered before 16 February 2024, due to funding deadlines.

**Contract Requirements**

This will be a fixed price contract.

To enable decisions about the future direction of Fauna & Flora’s impact reporting process to be made, by the 16 February 2024, the consultants will:

1. Take part in an inception meeting with key Fauna & Flora staff (and other consultants contracted for this work) to build an understanding of:
   - The key principles and stages of our annual impact reporting process
   - The methods and tools used for each stage, and why these are currently used
   - The audiences for Fauna & Flora’s impact reporting process, and their needs from the process
   - Key factors which are used to prioritise decision making for each stage of the process
   - Current systems in place at Fauna & Flora and how potential options might enable interoperability between systems and platforms (Fauna & Flora currently uses Dimensions and Salesforce, amongst other platforms, which will be described in more detail at the inception meeting)
   - Our key ambitions for Fauna & Flora’s impact reporting process going forwards
   - Note: following the group inception meeting, we expect each consultant to work independently on the development of the options paper

2. Critically review each stage* of the annual impact reporting process to:
   - Identify existing benefits and challenges of the current methods used
   - Identify alternative methods for conducting each stage of the process
   - Verify existing and identify new factors which should be considered in decision-making about methods used in the impact reporting process
   - * Note: we appreciate that your skills and experience might not be relevant to all stages of the impact reporting process. However, we will need any proposed changes to work as part of a comprehensive system so a review and recommendations for each stage is required for this consultancy.

3. Develop an options paper and present your findings back to Fauna & Flora:
   - The key output of this process will be the production of an options paper, which will guide how Fauna & Flora might take their annual impact reporting process forward. This should explain how the proposed options meet the current requirements of the impact reporting process, and ensure Fauna & Flora’s key
ambitions for the future can be achieved. The options paper should include a 
review of, and recommendations for, each stage of the process, as well as 
guidance on potential steps and resources required to move from the current 
process to an alternative process.
  o You will present the findings of your options paper back to Fauna & Flora, who 
will have the opportunity to ask follow-up questions.

The key dates for the requirements described above are:

- Week commencing 04 December 2023: Inception meeting
- 02 February 2024: Submission of draft deliverables (i.e., draft options paper)
- 02 – 16 February 2024: Opportunity for consultant to feedback to Fauna & Flora, and 
  for Fauna & Flora to ask questions on draft deliverables
- 16 February 2024: Submission of final deliverables (i.e., options paper)

Project location

The consultancy will be managed by the Conservation Design & Impact team at Fauna & 
Flora’s head office in the David Attenborough Building, Cambridge, UK. The consultants 
will work remotely at a location of their choice, though travel to the David Attenborough Building 
may be required.

Consultants will be required to attend a half-day inception meeting, which will be held at Fauna 
& Flora’s head office in the David Attenborough building. Consultants will also be able to join 
this meeting remotely.

Tender process and timetable

The tendering process will be as follows:

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Request for tender documents issued</td>
</tr>
<tr>
<td>2.</td>
<td>Tenders returned to Fauna &amp; Flora – the tenderer will supply a compliant tender including a fixed price or quote including breakdown of components for the entire scope of supply</td>
</tr>
<tr>
<td>3.</td>
<td>Shortlisted tenderers notified – preferred tenderers will be selected on the basis of the tender assessment criteria noted in the section below</td>
</tr>
</tbody>
</table>
| 4. | To accommodate availability, interviews will be conducted during either week commencing:  
  - 09 October 2023 OR  
  - 30 October 2023 | 09 October 2023 OR 30 October 2023 |
| 5. | Notification of successful tenderers | 06 November 2023 |
| 6. | Contracting process | From 06 November 2023 |

Fauna & Flora reserves the right to change its decision of successful tenderers if the 
negotiation/finalisation of the contract is prolonged.
Fauna & Flora reserves the right to discontinue the tender process at any time prior to contract signing.

**Tender assessment criteria**

For a tender to be assessed, the tenderer must have:

- **Essential**: Proven knowledge, skills and experience in:
  - Working with large, complex datasets, including analysis of qualitative and quantitative data
  - Responsible data management processes

- **Experience in at least two of**:
  - Institutional Monitoring, Evaluation & Learning, and / or impact reporting
  - Database environments, associated programming languages, and/or relevant data management tools
  - Experience managing complex spatial data (i.e. project boundaries) within the above-mentioned systems
  - Data visualisation skills with an emphasis on interactive, time-series and spatially explicit visualisation
  - Business intelligence

- **Essential**: An understanding of the complexity and realities of institutional reporting, where teams are balancing multiple workstreams, and are required to report to different stakeholders in different ways

- **Essential**: Ability to work with, and find solutions for, data of variable quality

- **Essential**: Excellent communication skills

- **Essential**: Fluency in English

**Tender conditions**

The tenderer agrees to comply with the following tender conditions:

1. The tenderer must notify in writing if any of the submitted tender information changes or if the tenderer becomes aware that information provided to Fauna & Flora is inaccurate, incomplete or misleading.

2. The tenderer must not hold itself out as an agent of Fauna & Flora or make any representations that would lead people to believe that Fauna & Flora guarantees the products and/or services offered by the tenderer.

3. If any claim is brought by any third party against Fauna & Flora and the claim is caused by any act or activities of the tenderer (or its subcontractors) under or in connection with the service/goods delivery or any other act, omission, misrepresentation or negligence on the part of the tenderer (or its subcontractors), then the tenderer must indemnify Fauna & Flora from and against all costs, expenses (including, but not limited to, legal and other professional fees and expenses) losses, damages and other liabilities (of whatever nature, contractual or otherwise) suffered or incurred by Fauna & Flora.
4 The tenderer must gain Fauna & Flora's prior written agreement to any publicity in connection with this contract. All details of the tender and any supporting documentation provided must otherwise be treated as strictly confidential.

5 Fauna & Flora reserves the right to request additional information from the tenderers after the final submission date.

6 Fauna & Flora reserves the right not to award the agreement to any tendering organisation or individual, cancel or withdraw from the tender process, to alter the terms or conditions of this Request for Tender, and/or alter within reason the tender process and timetable.

7 Fauna & Flora reserves the right to change its decision of successful tenderers if the negotiation/finalisation of the contract is prolonged.

8 Fauna & Flora reserves the right to discontinue the tender process for any reason at any time prior to contract signing.

9 Fauna & Flora reserves the right to enter into negotiations and subsequently contract with more than one supplier.

10 All duties, taxes, and other levies payable/chargeable by the contractor in relation to the contract shall be included in the total tender price submitted by the tenderer.

By signing below the tenderer agrees to be bound by the tender (including maintaining confidentiality and non-disclosure of any information provided to the tenderer by Fauna & Flora) and confirms that the information set out in its submitted tender documentation document is true and accurate in all respects:

........................................................................................................................................

for and on behalf of [insert tenderer name]

Name: ........................................................................................................

Position: ........................................................................................................

Date: ........................................................................................................
Tender information requirements

Submission of proposals from candidates who meet the criteria are invited by Sunday 01 October 2023 to Irina Dioguardi, irina.dioguardi@fauna-flora.org. Interviews will be conducted on either the week commencing 09 October 2023, or 30 October 2023, please state whether you have a preference in your submission.

A proposal should be comprised of:
1. Latest CV indicating consultant’s suitability for the assignment
2. The consultant’s approach to researching and creating an options paper
3. A proposed working timeline indicating how the consultant will carry out the assignment
4. A financial proposal stating the consultancy fees and including all applicable taxes quoted in USD. Note: if you are based outside the UK, this contract will be subject to reverse-charge VAT of 20%.