



care®

Public tender for a Project Management
Software Tool for CARE-Germany

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1. Who we are

For over 75 years, CARE Germany has been committed to providing emergency assistance in times of crisis, promoting gender equality, and combating the climate crisis worldwide. We are one of 14 national and legally independent CARE organizations, which coordinate their work under the name "CARE International" through our General Secretariat in Geneva.

CARE Germany supports during acute emergencies, but also long-term development projects to improve the living conditions of the most vulnerable in disadvantaged regions. This includes initiatives in the areas of education, health, water and sanitation, as well as economic empowerment. We work closely with local partner organizations to ensure that our projects are sustainable and meet the needs of the affected communities.

As part of the continuous development, learning and optimization of our work processes, we are issuing a call for tender for the development and implementation of a project cycle management software. The goal of this tender is to find a qualified service provider who can professionally assist us in designing and introducing a modern, user-friendly high-performance system and continue to provide advisory services in the years following its implementation.

We invite qualified service providers to apply for this tender and look forward to receiving your offers.

In this tender document, we will first outline the status quo at CARE. In the following chapters, we will outline our requirements for the new system. Finally, you will find information about the details required in your offer, as well as the planned timeline for the tender process.

2. Background

CARE Germany has experienced steady growth in recent years. In 2023, we implemented over 130 projects through more than 40 country offices and partner organizations, with a total volume of around EUR 230 million. The organization collaborates with numerous German and international donors, private donors, foundations and companies whose regulations, guidelines, and procedures have become increasingly comprehensive and need to be strictly monitored. Moreover, project setups are becoming more complex, often involving multiple partners or cross-country consortia managed directly by CARE Germany. To address these challenges, the International Program Department has restructured, now working across three teams to meet the various needs of project cycle management.

The International Program Department consists of a team of approximately 40 staff and has incorporated the management responsibility of 4 country presences (Iraq, Libya, Ukraine, Balkans) where around 25% of the overall portfolio is being implemented.

Besides the International Program Department, CARE Germany engages in programming in Germany managed by the Domestic Program Department; currently around 7-10 projects are being managed by the department.

Given the growth of the programming work, the demands on project and contract management have increased and the so far established ways of working are not matching our needs anymore. CARE Germany must ensure project quality to achieve desired objectives and impacts while minimizing financial risks associated with project implementation. This necessitates meticulous project design and management throughout all project cycle stages, along with consistent compliance with donor regulations through essential work steps and processes. Additionally, CARE Germany requires clear overviews of key financial and programmatic data and other critical information for strategic management and decision-making processes.

3. What we are looking for

The goal is to establish a comprehensive, user-friendly, and flexible cloud-based software for integrated project and contract management as well as decision making. The tool shall ensure high-quality management and monitoring of CARE Germany-supported projects during their design, implementation, and closure phases. It should facilitate financial and technical/programmatic project management requirements, support associated work steps and internal approval processes across departments, and enhance knowledge and information sharing. Furthermore, it should improve decision-making, oversight and overall data management. The tool must be compatible and interconnectable with existing tools and systems at CARE Germany, such as Microsoft 365 and Oracle/PeopleSoft- our internal finance & accounting software.

It is very important for us to find the most suitable service provider for this purpose. Technical expertise and an understanding of our sector play a central role. In addition, the design & roll-out phase are crucial steps in which we shall work hand-in hand to find the best tailored solution.

We are therefore looking for a service provider who can set up a system according to our requirements, carry out the migration and then support the ongoing use and further development. We are aiming for a collaboration lasting for several years.

4. Your offer - Functional requirements & specifications

General requirements
Comprehensive Project Cycle Management Application: The tool must be applicable throughout the entire project management cycle, from go no go decision to planning and development to monitoring, completion and audit, including any changes

or modifications during the project. It must support the management of complex consortium projects with multiple partners/donors/ contexts/countries/ different reporting cycles.

Technical Interoperability (financial + programmatic): Integration of both financial and programmatic project management aspects is crucial. This includes donor specific and internal reporting, impact measurement, burn rate control using the latest budget details as approved, quality management, and tracking baseline and progress data. The tool needs to support the setup of financial and programmatic monitoring for complex project setups across different countries, diverse partners, with several donors, different reporting periods, etc. and allow data import from Oracle/People Soft and vice versa.

Programmatic Integration: include monitoring/reporting, but also include CARE specific quality standards such as the CARE gender marker, CARE Program Quality standards and steps around decision making around contract changes and any kind of programmatic amendments.

Grants Management: include any contractual amendments during the project cycle.

Financial Integration: the detailed budget information shall be displayed in this software tool plus information about funds received per donor and funds transfers per partner and donor as well as funds spent as per the financial reporting (allocated and split as required following the funding mix of the project). It will be important to have the possibility to regularly update the financial project status in the software which will then need to be confirmed (=build the basis) for the reconciliation with and in the People Soft accounting. The tool should be able to differentiate between different mix of funding sources and types of grants.

Cross-Project Analysis Features: The system should offer cross-project search, analysis, evaluation, and reporting functions, with milestone setup and due dates for reporting.

User-Friendly Interface: The system should be easy to handle, even for non-IT staff or occasional users, featuring a pleasant interface and intuitive input, search, and navigation functions. Ideally, users can create their own reports and queries based on the need in the project/organizational reporting.

Automated Work Processes: Automated workflows should guarantee coherent sequences and compliance with essential work steps and standards, facilitating their processing and tracking.

Financial Overviews: Generate current overviews of key financial figures (e.g., sources for matching/own funds, outstanding payments, prefinancing needs) and other key data (e.g., number and volume of current projects, volume per calendar/project year, success rate with certain donors, strategic area, funds per donor) that are required for internal and external reporting requirements.

Project Status Inclusion: Include both active and inactive (expired or unapproved) projects and programs.

Cross-Departmental Access: Allow cross-departmental access for targeted collaboration, with permissions granted based on needs and roles.

Roles & rights administration: possibility to allow Country-Office/partner access and workflow participation, with permissions granted on needs basis and roles.

IT requirement: cloud-based system, with web front end. M365 interoperability, analysis through Power BI, Single sign on (SSO) integration, interoperability to an existing ERP People Soft (finance & accounting software)

Stakeholder/Partner/Contact Management: Integrate a stakeholder management feature, including an overview tab for key data and a contacts tab for individual stakeholder information.

Document Management: Include an integrated or connect to an existing document management system.

Tracing modifications: the system should allow for key users to see when and what changes have been made to key data and core information of a project – with the possibility to restore historical information / data.

Specifications for Proposal Development:

Project Pipeline Overview: Produce up-to-date project pipeline overviews (planned vs. ongoing), populated/filtered by various criteria (e.g., donors, project regions, project volume).

Linking Plans and Budgets: Link annual budgets plans/forecasts with work actual proposal development progress.

Approval processes: facilitate fast decision-making process for new proposal (PEA, Go/no-go. E.g.), also for ad-hoc emergency situations

Joint proposal writing: facilitate the management of a proposal development process (narrative & financial) with external stakeholders involved by granting special access to “externals”. Interlinkage/access to Sharepoint must be provided and simultaneous work (online) at the files shall be possible.

Specifications for Monitoring, Reporting, Evaluation, and Learning

Automated Reminders & Reporting Deadlines: Track narrative and financial reports with automated reminders to CARE Germany and project partners. Store reporting deadlines for all projects in the system, with clear visibility of upcoming reports and labels for submitted reports.

Task and Milestone Tracking: Link tasks and milestones to deadlines, with automatically generated email reminders for early planning and coordination.

Marker Data Management: Store and manage data on relevant markers (e.g., gender, resilience), with easy import/export options.

Risk Analysis: Facilitate risk analyses and decision-making on future project implementation based on data (e.g. access, political instability).

Key Figures: Generate reliable financial figures and other project data analyses for CARE Germany's portfolio on an ongoing basis (incl. status tracker).

Specifications for Documentation and Information Sharing

Project Documentation Management: Upload and access project documentation (e.g., monitoring visit reports, meeting minutes, project evaluation) directly via the system. The information should be stored in an interoperable way with CARE Germany's existing MS365 IT infrastructure.

Standardized Filing Structure: Maintain a standardized, linked filing structure with comment fields for background information.

Single Filing Requirement: Avoid duplication of filing structures; file everything only once.

Easy Data Sharing: Facilitate easy sharing of project data and documents with partners and potential donors via interfaces with CARE Shares or similar systems. These include visualized dash boards.

5. What information do we request from interested providers?

The following suggested structure is not a strict guideline, but we ask you to provide information on the various keywords listed:

1. Introduction of the service provider

- Age, size, number of employees, number of employees in comparable projects etc.
- Experience in project management tool with comparable projects
- Contact persons for reference checks, incl. contact details

2. Procedure and cooperation model: How will the solution be implemented?

- Before going live
 - Approach in the development / design phase
 - Cooperation model (incl.: Which specific tasks should CARE take of?)
- During implementation/role-out/go live
- During maintenance phase

3. Detailed description of your solution offer

- Structure, architecture, system language, compatibility

Which components of the system and/or third-party providers do you use? How do they work together? We expect your solution to use only components for which long-term support and further development by the respective provider/manufacturer are guaranteed. We have a clear preference for English as the project and system language, German as optional ad-on

- Customized or standard software

We prefer a standard or partial standard solution to a customized solution made specifically for CARE.

- Solution design

Please indicate how you will implement the requirements requested by CARE in a user-friendly surface solution. Please describe exactly how your solution supports the processes of project and contract cycle management as described in the functional requirements and specifications.

4. Data migration

Please describe your procedure for transferring existing data to a new system. While the current data is located at various places/tools/systems, how do you ensure correct data transfer?

5. Storage space

Please describe the storage space required by the system and explain the localization/storage of our data using your system. Please explain how data protection and security guidelines are taken into consideration.

6. Costs, expected time effort

- Design phase: costs and expected time effort. Please break down by:
 - Requirements analysis (user expectations, needs, specifications, etc.)
 - Development phase (configuration, programming ...)
 - Testing
 - Training
 - Data migration from the actual systems
 - Support for the go-live
 - Hypercare
 - Documentation
- After Go-live:
 - Troubleshooting
 - System administration
 - Operational monitoring & maintenance fees
- License costs or fees incurred for all required system components (e.g. Microsoft, third-party providers ...)

7. Timeline until go-live

- Timeline & activities until go-live
- Timeline of the go-live on day x (“big bang”) or step-by-step/phased approach?

8. Contract design

We prefer a works contract at a fixed price but are open to a well-argued service contract.

9. What makes your offer special?

6. Timeline tendering phase

The timeline of the tendering phase is as follows:

01.10.2024	Publication of the tender
13.10.2024	Deadline for interested vendors to notify CARE of intention in participating in the tender process
20.10.2024	Deadline for submission of clarification questions to CARE
24.10.2024	Collection of FAQ and answers sent to vendors participating in the tender process
31.10.2024	Deadline for the submission of offers
November 2024	Evaluation of the offers, determination shortlist, invitation for a pitch to 2-4 service providers
Late November 2024	Pitches: personal/hybrid presentation of the offers at CARE in Bonn
Beginning of December 2024	Award decision

Implementation of the project can start immediately after the decision is made.

7. Evaluation & selection criteria

An internal committee will carry out the evaluation & selection, and it is possible that we may seek external advice on certain matters. However, these external experts will not be part of the evaluating and decision-making committee.

The key evaluation criteria are:

- Cost-effectiveness
 - Design & Implementation costs
 - Ongoing operational costs
- Solution
 - To what extent the system meets our needs
 - Integration into CARE's IT landscape, cloud-based, SSO with M365
 - Scalability of the system
- Service provider's expertise
 - Professional expertise
 - Technical expertise
 - Service provider's experience with the system/systems
 - Proposal presentation
 - Service provider's strategic NGO alignment
 - Innovation capability
 - Advisory competence
 - Sector & NGO expertise
- Quality of collaboration
 - To what extent the cooperation model meets our needs
 - Team chemistry (manner of interaction, first impression)
 - Flexibility (availability)
 - Solution-oriented thinking
 - Transparent and quick communication

8. Contact

If you are interested in submitting an offer, please submit your offer in writing exclusively to the following email address: vergaben@care.de

Please refrain from contacting us via other communication channels, as this may lead to disqualification.

Responses to queries received during the tendering preparation process will be shared with all known vendors to ensure equal treatment.