



CALL FOR TENDER

DEVELOPMENT OF A STRATEGIC MANAGEMENT SOFTWARE

Terms of Reference

July 1, 2021

INTOSAI DEVELOPMENT INITIATIVE

Stenersgata 2, N-0184 Oslo, Norway



Information in brief	
Document	Call for tender – Terms of Reference
Assignment	Development of a Strategic Management Software
Entiry	INTOSAI Development Initiative, Stenersgata 2, 0184 Oslo, Norway
Contact Person	Laurent Grosse-Kozlowski, Manager SAI Governance laurent.grosse-kozlowski@idi.no
Procurement Method	The procurement is carried out in terms of the IDI Procurement Policy ¹

¹ The IDI Procurement Policy can be found @ <https://idi.no/elibrary/idi-administrative/policies/242-idi-procurement-policy/file>



INTRODUCTION

The INTOSAI Development Initiative (IDI) is a not-for profit, autonomous implementing body. IDI is mandated to support Supreme Audit Institutions (SAIs) in developing countries to sustainably enhance their performance and capacity. As an integral part of the INTOSAI community, IDI has a unique mandate to serve the needs of all developing country SAIs while not being tied to any country's specific geographic or political interests. IDI is currently implementing its Strategic Plan 2019-2023. The strategic plan focusses on four work streams to support independent, well-governed, professional and relevant SAIs. The Strategic Management Software Project is being implemented by the IDI as part of its Well Governed SAI Work Stream under the Strategy, Performance Measurement and Reporting initiative (SPMR).

SPMR

The Strategy, Performance Measurement and Reporting initiative (SPMR) is aimed at supporting SAIs to better assess, plan, manage and report on their performance throughout an entire strategic management cycle.

SPMR assists SAIs in:

- Holistically assessing their performance through the SAI PMF methodology²
- Taking stock of stakeholders' views and expectations of the SAI
- Developing realistic and prioritized strategic plans that incorporate a well-defined results framework
- Preparing holistic operational plans that are aligned to the strategic plan and consider necessary and available resources
- Exercising effective decision-making for steering implementation towards desired results on the basis of reliable monitoring and risk management systems
- Reporting transparently and objectively against the annual and strategic performance objectives

BACKGROUND

At the end of 2020, IDI published the SAI strategic management handbook³ which aims to provide step-by-step, user-friendly guidance for strategic management, from performance assessment and strategic planning through operational planning, performance measurement and reporting that reflects recent developments and latest thinking.

² SAI PMF is an international assessment framework of a SAI's performance against the International Standards of Supreme Audit Institutions (ISSAIs) and other established international good practices.

³ <https://idi.no/elibrary/well-governed-sais/strategy-performance-measurement-reporting/1139-sai-strategic-management-handbook-version-1/file>



It also promotes and supports the use of performance measures and transparent reporting on performance by SAIs.

However, strategic management is a complex process that requires the involvement and coordination of various parts of the SAI and simultaneous work on various aspects. Therefore, SAIs could benefit from a digital solution that translates the guidance provided by the handbook into practical step-by-step tasks and customizable formats that facilitate an efficient and comprehensive process. Indeed, developing and implementing a strategy can easily be resource consuming when this is done manually.

The ambition of the Strategic Management Software project is to offer those SAIs who need it a digitalized tool to help them to design and manage their strategic plan and follow on its implementation.

In line with the IDI Strategic Plan 2019-2023, it will help SAIs to strengthen their strategic management through digitalization. It will also help them to strengthen their corporate services, notably through digitalized staff planning and financial reporting to facilitate the execution of their strategic plan.

Such a tool should allow SAIs to easily plan their strategy, manage their activities, track progress and report on results.

IMPLEMENTATION APPROACH

The solution will be developed incrementally. That means that not all functions will be available at the same time and they will be added at different stages of the software development.

Based on the survey that was conducted in April/May 2021 among SAIs participating in the SPMR initiative, the main following functions were listed as ones the software should propose, in priority order:

1. Strategic Planning
2. Operational Planning & Risk Management
3. Budget Planning/Expenses Tracking and Human Resources Management (Staff planning)

Based on this, the Alpha version will focus on (1) Strategic Planning and (2) Operational Planning and (3) Budget Planning, Expenses Tracking and Human Resources to the extent possible. A decision will be made in agreement with the selected provider.

The other areas such as Risk Management will be developed from 2022 onward depending on resources available.

A panel of SAIs from different regions in the world will also participate in the development of the software and test it to ensure it meets end users' needs and expectations.



Technical development approach

Considering the specific nature of IDI and its stakeholders for this project, the following shall be considered:

- Fast development time
- Low cost development and maintenance
- High degree of flexibility (easily modifiable by any provider)
- Document collaboration (including having version management so that user can have previous version and navigate through different versions of the document)
- Ability for IDI to perform simple configurations, data management, user management
- Possibility to integrate with O365 (through extracting text format information)
- Security
- Large community of users (dynamic localization through the possibility to translate the menus and fields)
- Solid, worldwide operating vendors that will be around for all foreseeable future

PURPOSE OF THE TENDER

The purpose of the current tender is to select a provider to develop a digital solution that interested SAIs will use as described below. The solution shall also consider its hosting, distribution/access, update and maintenance.

SOFTWARE SPECIFICATION & REQUIREMENTS

Functional requirements are described in Appendix.

In addition, the following have been identified as functional requirements:

- The system should be process oriented.
- Ensure that the current templates (see the Strategic Management Handbook) are integrated.
- Automatic support by integrating our Strategic Management Handbook guidance material.
- Allow for sending documents in a workflow for comments, review and in some cases approval. Including notification when documents are reviewed and approved.
- A type of simple progress tracker or dashboard where you can include the main milestones and responsibilities etc. for project management within the team.
- Timeline for planning and monitoring. Plot key milestones and auto reminders when the deadline is approaching.



Non-functional requirements are performance, availability (above 99 %), security, scalability, reliability and compliance.

PROCESS AND TIMETABLES

Key milestones for the project are:

1. Invitation to tender issued (1 July 2021)
2. Technical and financial proposals, preferably limited to 15 pages with additional critical information in appendices submitted to IDI (31 July 2021)
3. Provider selected by IDI (15 August 2021)
4. Kick-off meeting between provider and IDI (1 September 2021)
5. Development and testing of the Alpha version (1 September – 30 January 2022)
6. Release of Beta Version (28 February 2022)
7. Further developments (From March 2022 - Detailed schedule to be discussed)

BUDGET

The maximum budget for the development of the Pilot is 500 000 NOK (VAT incl.) over 2021 and early 2022. From 2022, further developments will depend on the result of the Pilot and resources available.

ELIGIBILITY OF SERVICE PROVIDERS

Bidding is open to: firms and consultants operating on an individual basis. Non eligible bidders are: 1) Current permanent employees of SAIs on an individual basis, 2) former IDI staff, 3) consultants or firms that have staff members with close family connections to staff in the IDI, and 4) consultants or firms that that are providing substantial services to the IDI (where the IDI fees received was above 15% of the total income of the company or individual in 2019 or 2020).

PROCUREMENT METHOD

In accordance with IDI procurement policy for contracts of this value this procurement will be a global call for different service providers to submit their bids together with direct contacts with identified potential vendors.

SUBMISSION OF QUESTIONS & PROPOSALS



Interested service providers should submit a technical (including the methodology they propose to implement to develop the product) and financial proposal, in English, by email to laurent.grossekoslowski@idi.no by 31 July 2021, 5 pm Oslo time. This should comprise:

- Proposed methodology and timelines for the assignment, including technological approach.
- Experience in similar projects.
- Experience in or proposed approach to include gender and inclusiveness issues in the project.
- Understanding of IDI as well as SAIs' IT challenges in developing countries.
- Full CV of the proposed team leader and short CVs of any other proposed team members.
- A financial proposal for the work, including payment schedule according to deliverables.
- A tax (VAT / Sales Tax etc.) certificate.

IDI implements a gender responsiveness policy. Potential vendors shall also include information regarding the number of women (1) in the proposer's organization, (2) in executive and senior positions, and (3) shareholders.

Questions shall be submitted to the same contact by 15 July 2021, 5 pm Oslo time.

SELECTION OF SERVICE PROVIDER

Selection will be made based on the best price and quality combination, according to the following evaluation matrix.

CRITERIA	MAXIMUM SCORE
METHODOLOGY Proposed methodology for assignment including consultation with external stakeholders	25
TECHNICAL SOLUTION Proposed technical solution with regards to the functional and non-functional requirements	25
TEAM Experience of the provider and assigned team members in designing and delivering similar digital solutions	20



FINANCIAL PROPOSAL	
Financial proposal (based on Norwegian Kroner equivalent at the time of evaluation), including estimates on required infrastructure (hardware), hosting options, maintenance costs including software and hardware.	30
TOTAL	100

* The lowest price proposal considered eligible will be scored at 10, others will be scored according to the following formula: score = lowest fee rate/(quoted fee rate) x 10. The assignment will be contracted in Norwegian kroner.