



REQUEST FOR INFORMATION



REQUEST FOR INFORMATION

Surge Management System

RFI Main Facts Table	
RFI Reference	FY21 – 148 Surge & Resource Capacity Management System
RFI Issue date	4 th June 2021
Contract Manager	Ben Philips
Deadline for submission of offers	4th July 2021

Submission of offers to

Procurement@plan-international.org

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RE: FY21- 148 **Surge & Resource Capacity Management System**

Plan Limited is currently reviewing the provision of **Surge & Resource Capacity Management System**. As part of developing our plans to meet this requirement we are issuing this Request for Information (RFI). This RFI is one vehicle by which we can systematically identify similarities and differences between suppliers in the market, and additionally gain a greater understanding of specific suppliers' abilities, core business and strategic outlook with respect to the **Surge & Resource Capacity Management System**.

You are invited to submit a response to this RFI. The purpose of the RFI at this stage is to prequalify suppliers based on their response, selected suppliers will be invited to perform presentations and/or demos. This will be considered solely for the purposes of building greater understanding of the marketplace and industry's ability to fulfil our requirements. We look forward to your response by the closing date and time provided on the cover page of our RFI documentation.

Yours sincerely

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Plan Global Hub

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Duke Street, Woking, Surrey

GU21 5BH, United Kingdom

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PART 1 – BACKGROUND

1. Background Information on Plan International

Plan International is an independent development and humanitarian organisation that advances children's rights and equality for girls.

We believe in the power and potential of every child. But this is often suppressed by poverty, violence, exclusion and discrimination. And its girls who are most affected. Working together with children, young people, our supporters and partners, we strive for a just world, tackling the root causes of the challenges facing girls and all vulnerable children.

We support children's rights from birth until they reach adulthood. And we enable children to prepare for – and respond to – crises and adversity. We drive changes in practice and policy at local, national and global levels using our reach, experience and knowledge.

We have been building powerful partnerships for children for over 75 years, and are now active in more than 70 countries.

Read more about Plan International's Global Strategy: 100 Million Reasons at <https://plan-international.org/strategy>

1.1 Company overview

Plan International's new global strategy has an intent to take action to help 100 million girls learn, lead, decide and thrive.

Putting this new strategy into practice will require significant changes across the organisation as we work towards becoming a global thought leader on girls' rights.

One such improvement is the need for a robust and agile Surge management system, enabling the coordination of the lifecycle of surge resources.

Surge management capabilities support the ongoing strategic initiatives and closely links with Plan International approach to Disaster Response Management (DRM).

The intended outcome of the capability exists to ensure Plan International responds efficiently and effectively to the wider needs of the organisation, providing the right skills and the right time and manages the resources available to us.

1.2 The Opportunity

Plan International's current approach to rapid deployment and surge management is heavily resource dependent and leverages a multitude of technologies and system. Whilst the opportunity to improve has been identified we currently are unclear on the final requirements or capabilities in the market and therefore will be using this process to develop our own thinking.

The following list contains some early thinking with regard to the type of information we would expect the system to store and outcomes it will support, it is not exhaustive and the expectations are that responders to the RFI will bring their own unique viewpoint and knowledge to the table in demonstrating what would be capable:

- Improves the management of resources across deployments
- Provides a single system for management of Plan International global roster and surge capability, includes internal, external and partner resources
- We know where every resource is deployed, from and until, tracking of deployment timeframes.
- Cost management of resources and deployments, for the benefit of reporting and charging.

The following covers a list of capabilities and types of information that we would expect to be in the system, but we do not see that as conclusive and should not be taken as a limit on the outcomes we are looking to achieve

- Skills database and skills mapping/qualifications
- Language skills
- Training requirements and compliance
 - this may include linkages with existing HRIS and/or LMS systems.
 - Completion of Plan International mandatory trainings
- Current and historical deployment data (ability to archive historical data) including reference checks on file and up to date/VISAs
- Availability management e.g. annual leave, absence visibility
 - this may include linkages with existing HRIS
- Integration to external systems e.g.:
 - Insurance
 - International SOS
 - Travel Procurement
- Relevant travel restrictions:
 - Historical travel
 - Nationality
- Status of a deployment resources
 - Health
 - Availability
 - Status
 - Personal relevant information e.g. Vaccinations
- Historical deployment and end of deployment exit interviews/debriefs
- Performance data e.g. end of deployment appraisal / other feedback mechanisms
- Offline capabilities and support for templates.
- Environmental impact of disaster response (CO2 impacts).
- Analytics of the data, graphs, charts and maps
- Skills demand and skill gap management
 - Who do we have and what are we lacking?
- Notifications of pending actions.
- Demand matching.
- Resource to resource, and resource to support personnel communications.
- Request management e.g. raise requests for deployments simply and quickly
- Ability to send alerts to roster members regarding potential deployments, or other actions required.
- Mobile device friendly interface.
- Role based access control for different users/user groups.
- Categorise emergencies / programmes / 1st wave 2nd wave etc

- Workflows and approval management e.g. a manager being able to approve/release internal staff

1.3 Purpose of the RFI

The purpose of this RFI is to allow Plan to assess supplier responses and use the resultant assessments in future decision making in regard to supply of the Opportunity. Based on supplier response, selected supplier/s will be invited to perform presentations and/or demos. This will be considered solely for the purposes of building greater understanding of the marketplace and industry's ability to fulfil our requirements. Whilst it is the intent of Plan to compare supplier responses for the purposes of pre-qualification and possible short listing for further consideration, Plan Limited makes no obligations or undertakings in any way to:

- go to tender; or
- accept any RFI information received from suppliers; or
- include suppliers responding to this RFI in any future tender invitation; or
- any other commitment to suppliers whatsoever, including any intention to form a contract with any supplier for provision of the Opportunity.

PART 2 – INSTRUCTIONS

This Part sets out instructions regarding submission of responses to this RFI.

2.1 RFI key dates

The following key dates apply to this RFI:

RFI Issue Date As stated on the RFI Cover Page

RFI Closing Date and Time As stated on the RFI Cover Page

2.2 Company contact

The following individual is the nominated Plan contact for this RFI.

Name	Mohammad Anwar
Title/Position	Procurement Officer
Email address	procurement@plan-international.org
Postal address	Block A, Dukes Court, Duke Street, Woking, Surrey GU21 5BH

2.3 Queries and questions during the RFI period

Suppliers are to direct any queries and questions regarding the RFI content or process to the Company contact. All questions should be submitted by email to procurement@plan-international.org Plan may choose to convey responses to submitted questions and queries to all suppliers so that each is equally informed.

2.4 Opportunity briefing and site visit

Plan will hold an RFI briefing session to further familiarise suppliers with the Opportunity.

2.5 Response lodgement methods and requirements

Suppliers must submit one copy of their response to Plan by the following method:

- a) By email to : procurement@plan-international.org. The subject heading of the email shall be **FY21 – 148 Surge & Resource Capacity Management System [Proposer Name]**. Electronic copies are to be submitted by PDF and native (e.g. MS Word) format and proposers may submit multiple emails (suitably annotated e.g. Email 1 of 3), or zipped, if attached files are deemed too large to suit a single email transaction.

Responses must be prepared in English and in the format requested in Part 3 of this RFI.

2.6 Late responses

Suppliers are responsible for submitting their response prior to the RFI closing date and time in accordance with the acceptable lodgement requirements described in Clause 2.5. There will be no allowance made by Plan for any delays in transmission of the response from supplier to Plan. Any Proposal received by the Company later than the stipulated RFI closing date and time may be removed from further consideration by Plan.

2.7 Suppliers to inform themselves

Plan has taken all reasonable care to ensure that the RFI is accurate; however, Plan gives no representation or warranty as to the accuracy or sufficiency of the contained information.

2.8 Costs of preparing the response

All costs relating to the preparation and submission of a response are the sole responsibility of the supplier. Plan shall not pay the supplier, wholly or in part, for its response.

2.9 Confidentiality

Except as required for the preparation of a proposal, suppliers must not, without Plan's prior written consent, disclose to any third party any of the contents of the RFI documents. Suppliers must ensure that their employees, consultants and agents also are bound and comply with this condition of confidentiality.

2.10 Acceptance of these Conditions

Suppliers, by submitting a response to this RFI, are deemed to have acknowledged and agreed to the conditions set out in this RFI and have read and agreed to Plan's general Terms and Conditions included in this RFI.

PART 3 – INFORMATION TO BE PROVIDED

This Part details all the information suppliers are required to provide to Plan. Submitted information will be used by Plan as set out in Clause 1.3. The following minimum information is to be provided. If this information, or any additional information, is available on your website please provide the address to enable Plan to undertake further analysis.

3.1 Supplier details

- a) Supplier name (Trading and Registered), ABN, registered address.
- b) Details of supplier operations and operating locations.

- c) Supplier ownership information, including details of Directors and other key office bearers.
- d) Details of any current legal actions pending against the supplier or its directors and/or office bearers.
- e) Relationships with any parent company (if applicable).
- f) Details of joint venture arrangements (if applicable).
- g) Details of when the supplier organisation was founded, including origins and historical development of the organisation (if needed).
- h) Total number of employees.

3.2 Supplier capabilities and experience

- a) A description of the core supplier business, listing relevant case studies or examples (a maximum of three) that support this description. Where possible, include case studies that may relate to activities consistent with the Opportunity. Within necessary boundaries of confidentiality, please be as specific as you can.
- b) Additional services, products and works provided outside of your core business.
- c) Examples (if any) of services that supplier has provided to Plan including the name of the Company representative/s concerned.
- d) Details of key health and safety, environmental and other performance measures.

3.3 Supplier financials

- a) Details of supplier's financial background in particular latest annual report or latest financial statements.
- b) Details of held insurances relevant to the Opportunity.
- c) Supplier market share in terms of turnover, revenue and volume output.
- d) Details of potential funding arrangements, lines of credit etc. to support investment in the Opportunity (if relevant).

3.4 Certifications and awards

- a) Details of all certifications held (e.g. ISO 9001) including date of last certification/recertification and details of the certifying body (copies of certifications may be appended to your response).
- b) Details of any recent external corporate awards, including the awarding body, if relevant to the Opportunity.

3.5 Policies

- a) Details of all major supplier policies, including Health and Safety, Environmental/Sustainability, Employee Relations and Local Participation. Copies of policies are to be appended to your response.

3.6 Indicative Pricing

- a) Details of indicative rates and prices to perform the Opportunity.

3.7 Other Information

- a) Any further information you believe Plan may require in support of its RFI review.
- b) An overview of technical capabilities of the system, whilst the RFI process will not 'dig deep' into these capabilities, the following areas may be topics of discussion:
 - a. Hosting / Data Capabilities including:
 - i. SaaS Options
 - ii. Security
 - iii. Updates and Release Management
 - iv. Compliance to standards
 - v. Disaster Recovery
 - b. Support Capabilities:
 - i. Support Options
 - ii. Availabilities
 - iii. SLA's
 - c. Integration capabilities
 - i. Authentication and user management (Okta)
 - ii. HRIS (SuccessFactors)
 - iii. LMS (Totara)
 - iv. ERP (Dynamics 365)
 - v. Monitoring & Evaluation (Salesforce/AMP:Impact)
 - d. Implementation and On-going Professional Service