

## REQUEST FOR PROPOSAL

TO:

To whom it may concern

<b>Date of issue:</b>	March 15 <sup>th</sup> , 2024
<b>RFP no.:</b>	2023-065
<b>Contract title:</b>	Data warehouse platform
<b>Closing date:</b>	April 15 <sup>th</sup> , 2024
<b>Contracting Authority:</b>	Norwegian Church Aid  Contact person: Lakshay Kochhar Tel: +4746889311 Email: <a href="mailto:lakshay.kochhar@nca.no">lakshay.kochhar@nca.no</a>
Please note that the Proposals must be sent by email to the Contracting Authority contact person above and to <a href="mailto:procurement@nca.no">procurement@nca.no</a> , clearly marked with the contract name and RFP no.	

### NORWEGIAN CHURCH AID (NCA) INVITES YOU TO SUBMIT A PROPOSAL FOR A DATA WAREHOUSE PLATFORM

Dear Sir/Madam,

Norwegian Church Aid is seeking a knowledge partner, and potential long-term partner, who can assist NCA to build a solid infrastructure: which enables downstream analytics capabilities and to be able to use data across the various divisions and move as one. We are seeking a partner who can contribute with comprehensive view of both the technical implementation, design, and strategic advice.

Please find enclosed the following documents which constitute the Request for Proposal:

#### A – Instructions

- Annex 1: Terms of Reference with specifications.** (Specifications to be filled out by Supplier)
- Annex 2: Proposal Submission Form** (to be completed by the Supplier)
- Annex 3: General Terms and Conditions for Service Contracts**
- Annex 4: Code of Conduct for Contractors**

If this document is a PDF format, upon request, a complete copy of the above documents can be forwarded in a WORD format for electronic completion. It is forbidden to make alterations to the text.

Any subsequent procurement related to this Tender Dossier will be subject to the Contracting Authorities General Terms and Conditions (GTC) for Service Contracts and the Code of Conduct for Contractors available through the below link. The Contracting Authority may for its own convenience and without charge or liability cancel the RFP at any stage.

Annex 3. [General terms and conditions](#)

Annex 4. [Code of Conduct for Contractors](#)

We should be grateful if you would inform us by email of your intention to submit or not a proposal.

## A. INSTRUCTIONS

**In submitting a proposal, the Supplier accepts in full and without restriction the special and general conditions including annexes governing this Contract as the sole basis of this procedure, whatever his own conditions of services may be, which the Supplier hereby waives. The Suppliers are expected to examine carefully and comply with all instructions, forms, contract provisions and specifications contained in this Request for Proposal.**

### **A.1. Scope of services**

The Services required by the Contracting Authority are described in the Terms of Reference in Annex 1 with specifications.

The Supplier shall offer the totality of the Services described in the Terms of Reference with specifications. Suppliers offering only part of the required Services can be rejected. Suppliers offering only part of the required solutions will either need to describe this and inform about if such solutions will be developed later, and if so when, or inform about the possibilities and cost for such developments.

### **A.2. Cost of proposal**

The Supplier shall bear all costs associated with the preparation and submission of his proposal and the Contracting Authority is not responsible or liable for these costs, regardless of the conduct or outcome of the process.

### **A.3. Eligibility and qualification requirements**

Suppliers are not eligible to participate in this procedure if they are in one of the situations listed in article 33 of the General Terms and Conditions for Service Contracts.

Suppliers shall in the Proposal Submission Form attest that they meet the above eligibility criteria. If required by the Contracting Authority, the Supplier whose proposal is accepted shall further provide evidence satisfactory to the Contracting Authority of its eligibility.

If the Contracting Authority provides additional information on the tender dossier, such information will be sent in writing to all other prospective Suppliers at the same time. Suppliers may submit questions to the email listed on the front page. Information regarding interpretation of this invitation, suppliers must be done by email to the contact person on the front page.

Suppliers are also requested to certify that they comply with the Code of Conduct for Contractors.

### **A.4. Exclusion from award of contracts**

Contracts may not be awarded to Suppliers who, during this procedure:

- (a) are subject to conflict of interest.
- (b) are guilty of misrepresentation in supplying the information required by the Contracting Authority as a condition of participation in the Contract procedure or fail to supply this information.

### **A.5. Documents comprising the Request for Proposal**

The Supplier shall complete and submit the following documents with his proposal:

- a. Proposal Submission Form (Annex 2) duly completed and signed by the Supplier.
- b. Requirement Specification List, with answers to all Functional and Non-functional needs. Plus comments on how Needs are covered/not covered/partial covered.
- c. CVs of key experts that will be involved in the implementation and follow up and other relevant information that should be made known to the Contract Authority.

The proposal and all correspondence and documents related to the Request for Proposal exchanged by the Supplier and the Contracting Authority must be written in the language of the procedure, which is English.

#### **A.6. Financial proposal**

The Financial Proposal shall be presented as an amount in NOK in the Proposal Submission Form in Annex 2. All functions rated with "Must have" (3) in the requirement specifications list (Annex 2), must be included in the price offer. If functionalities rated "Could have" (1) or "Should have" (2) are not included in the standard solution, please give a separate price estimate of possible and comment in the requirement document next to each functionality.

The Supplier shall be deemed to have satisfied himself as to the sufficiency of his/her proposed global remuneration, to cover both his/her fee rate, including overhead, profit, all his/her obligations, sick leave, overtime and holiday pay, taxes, social charges, etc. and all expenses (such as transport, accommodation, food, office, etc.) to be incurred for the performance of the Contract. The proposed global remuneration shall cover all obligations of the successful Supplier under the Contract (without depending on actual time spent on the assignment) and all matters and things necessary for the proper execution and completion of the Services and the remedying of any deficiencies therein.

**VAT and/or any sales tax applicable to the purchase of services shall be indicated separately in the proposal.**

#### **A.7. Supplier's proposed personnel**

The Supplier shall include a detailed description of the role and duties of each of the key experts or other non-key experts, which the Supplier proposes to use for the performance of the Services. The key experts are those whose involvement is considered instrumental in the achievement of the contract objectives. The CV of each key expert shall be provided highlighting his/her experience in the specific field of the Services and his/her specific experience in the country/region where the Services are to be performed.

In the Proposal Submission Form, Annex 2, the Supplier shall provide detailed information about key experts' actual availability for the performance of the Contract.

If, before the signing of the Contract, a key expert proposed in the proposal is no longer available the Supplier shall inform the Contracting Authority immediately and the proposal might in such case be considered invalid.

#### **A.8. Subcontractors**

If the Supplier intends to use subcontractors, the Supplier shall state their names, qualifications, role and duties in the performance of the Contract and the Supplier shall specify the parts of the Services which will be executed by the subcontractors, which may not exceed 30% of the Contract. Provisions of article "Supplier's proposed personnel" concerning the Supplier's personnel and the article concerning eligibility and qualification requirements shall apply to the subcontractors or the subcontractor's personnel.

#### **A.9. Validity**

Proposals shall remain valid and open for acceptance for 60 days after the closing date. Prior to the expiry of the proposal validity period, the Contracting Authority may ask the supplier in writing to extend this period. Suppliers agreeing to extend the validity period will be permitted to modify their bid.

#### **A.10. Submission of proposals and closing date**

Proposals must be received at the address mentioned on the front page by email not later than the closing date and time specified on the front page.

#### **A.11. Evaluation of Bids**

The evaluation method will be the quality and cost-based selection. A two-stage procedure shall be utilised in evaluating the Proposals, a technical evaluation and a financial evaluation.

Bids will be ranked according to their combined technical (St) and financial (Sf) scores using the weights of 60% for the Technical Proposal; and 40% for the offered price. Each proposal's overall score shall therefore be: St X 60% + Sf X 40%.

**Technical evaluation**

The specification list attached details the requirements both in terms of technical infrastructure and the functionality of proposed platform. For the evaluation of the technical proposals, the Contracting Authority shall take the following criteria into consideration, with the indicated weights:

Technical evaluation and strategic evaluation		Maximum Points
	<b>Solution /System</b>	
1	Understanding of technical IT and Azure/ Fabric infrastructure	15
2	Proposed methodology for data integration from multiple sources (ELT)	15
3	Setup of data modelling infrastructure and practices	10
4	Setup of Azure storage which meets industry compliance requirements	15
5	Setup of data analytics standards	10
6	Infrastructure security, data integrity and governance capability	10
7	Sharing knowledge during project implementation	5
	<b>Supplier</b>	
8	Supplier's CSR related policies – e.g. HR policy, health and safety policy, energy policy, climate policy, Global Compact membership etc. Related certifications e.g. ISO or SA8000	5
9	References form previous implementations (system and implementor)	5
10	Suppliers capacity to implement and follow up implementation and support the first year of use, including information about expertise and experience of implementation personnel	5
11	Future readiness and strategic fit on organisational level (vendor and implementor)	5
<b>Total Technical Score</b>		<b>100</b>

**Presentations and Demos**

The Contracting Authority reserves the right to call to invite Suppliers having submitted proposals determined to be substantially responsive to do presentations and demos of their solution if asked for..

**Financial evaluation**

Each proposal shall be given a financial score. The lowest Financial Proposal (Fm) will be given a financial score (Sf) of 100 points. The formula for determining the financial scores shall be the following:

Sf = 100 x Fm/F, in which  
 Sf is the financial score  
 Fm is the lowest price and  
 F is the price of the proposal under evaluation

## **Negotiations**

The Contracting Authority reserves the right to contact the Suppliers having submitted proposals determined to be substantially and technically responsive, to propose a negotiation of the terms of such proposals. Negotiations will not entail any substantial deviation to the terms and conditions of the Request for Proposal, but shall have the purpose of obtaining from the Suppliers better conditions in terms of technical quality, implementation periods, payment conditions, etc.

Negotiations may however have the purpose of reducing the scope of the services or revising other terms of the Contract to reduce the proposed remuneration when the proposed remunerations exceed the available budget.

### **A.12. Award criteria**

Contracting Authority will award the Contract to the Supplier whose proposal has been determined to be substantially responsive to the documents of the Request for Proposal and which has obtained the highest overall score.

### **A.13. Signature and entry into force of the Contract**

Prior to the expiration of the period of the validity of the proposal, the Contracting Authority will inform the successful Supplier in writing that its proposal has been accepted and inform the unsuccessful Suppliers in writing about the result of the evaluation process.

Within 7 days of receipt of the Contract, not yet signed by the Contracting Authority, the successful Supplier must sign and date the Contract and return it to the Contracting Authority. On signing the Contract, the successful Supplier will become the Contractor and the Contract will enter into force once signed by the Contracting Authority.

If the successful Supplier fails to sign and return the Contract within the days stipulated, the Contracting Authority may consider the acceptance of the proposal to be cancelled without prejudice to the Contracting Authority's right to claim compensation or pursue any other remedy in respect of such failure, and the successful Supplier will have no claim whatsoever on the Contracting Authority.

### **A.14. Cancellation for convenience**

The Contracting Authority may for its own convenience and without charge or liability cancel the procedure at any stage.

### **A.15. Data Protection and Privacy**

The Contracting Authority may collect and process personnel data such as names, addresses, telephone numbers, email addresses, banking details and CVs. Such data will be used for the sole purpose of managing the procurement process and any subsequent Contract issued as a result of the procurement process, including transmission to bodies charged with monitoring and or inspecting procurement processes, in accordance with applicable EU, international and national law on data protection. Data may be stored for as long as a legitimate reason remains for its storage and up to a period of seven years.

Submission of any bid, proposal, quotation or offer and acceptance of any subsequent Purchase Order or Contract signifies the bidders consent to such data collection and its processing

The General Terms and Conditions provide reference to the specific rights, and regulations related to the data that is stored.

## ANNEX 1: TERMS OF REFERENCE WITH SPECIFICATIONS

### Part A: About NCA:

Norwegian Church Aid is an independent humanitarian organisation that works with people and organisations around the world in their struggle to eradicate poverty and injustice. As one of the Nordic region's largest aid organizations, we are headquartered in Oslo and work in more than 30 countries, together with our partners, to seek justice and save lives. More information on <https://www.nca.no>

### Part B: Project Information

**Background:** Norwegian Church Aid (NCA), as a leading Norwegian organization in development aid and humanitarian assistance, seeks to enhance its operations through a more data-driven approach. The organization aims to consolidate various data sources to improve decision-making processes and operational efficiency.

**Purpose:** The initiative aims to build a robust data infrastructure to support NCA's vision of being data-driven, enabling effective downstream analytics capabilities across different organizational divisions. This will allow NCA to operate cohesively and make informed decisions that align with its mission of global justice and aid.

### Part 2: Scope of the Project

This project encompasses the design, development, and implementation of a Data Platform to integrate multiple data sources, provide a unified platform for data access and analytics, and ensure data governance and compliance. It includes procuring necessary technology, migrating existing data, training staff, and providing implementation support. The data platform will need to integrate data from multiple sources, including Maconomy, PIMS (Precio Fishbone), Salesforce, Aditro (SDworks), currency rates, SharePoint Excel files, and others identified as necessary for future incorporation, such as planner tools and monitoring systems.

Key use cases include reporting automation, data quality checks, dashboarding, data modelling, efficiency analysis, and compliance monitoring. The platform should support data documentation, testing, monitoring, role-based access control, collaborative coding, data lineage, and GDPR-compliant security measures. NCA prefers solutions that can integrate with Microsoft products, considering Microsoft Fabric as a potential backbone for the data platform due to existing infrastructure and data storage in Azure databases.

Project milestones:

1. Project Kick-off:
  - a. Target Date: [Estimated beginning of June]
  - b. The project will officially commence with a kick-off meeting, bringing together the NCA's project team and the selected vendor's project team. This meeting will serve to confirm project objectives, deliverables, roles and responsibilities, and communication protocols.
  
2. Completion of design:
  - a. Target Date: [Estimated end of June]
  - b. By this date, the detailed design of the data platform, including architectural plans, various building blocks of the data platform, data ingestion plan, storage and modelling layer along with key elements, will be completed and approved by NCA. This phase will involve close

collaboration between NCA and the vendor to ensure the platform's design meets our operational needs and strategic objectives.

3. Completion of Data Platform:

- a. Target Date: [Middle of September]
- b. This milestone marks the successful completion of the data platform's development and deployment. This includes not only the integration of existing data sources and the migration of current data into the system but also the full implementation of all platform functionalities as specified in the design phase. Key activities under this milestone will include:
  - i. Finalizing the development of all platform components, including data processing pipelines, analytics tools, user interfaces, and security measures.
  - ii. Conducting comprehensive system integration testing to ensure seamless functionality across different modules and compatibility with existing NGO workflows and data sources.
  - iii. Completing the data migration process, ensuring all historical and current data is accurately transferred to the new platform, with integrity checks to guarantee data quality and consistency.
  - iv. Performing thorough testing to validate that the platform meets all specified requirements and is ready for deployment.

4. User Training Completion:

- a. Target Date: [End of September]
- b. Comprehensive training sessions for NCA's staff on utilizing the new data platform will be conducted and completed by this date. Training will cover platform functionality, data modelling & analysis, and reporting capabilities to ensure our team can fully leverage the platform from day one.

5. Project Closure:

- a. Target Date: [October beginning]
- b. The project closure phase will involve a final review of the project deliverables against the initial objectives and requirements. Upon satisfactory completion of this review and resolution of any outstanding issues, the project will be formally closed, and a closure report will be issued.

Key activities

1. Evaluate current data infrastructure and identify data sources.
2. Develop and implement data integration pipelines to ingest and process data from identified resources.
3. Design and deploy the data warehouse architecture.
4. Establish data governance policies and ensure compliance with relevant data protections regulations.

5. Providing training and deploy the platform for operational use.
6. Monitor the platform's performance and make necessary adjustment before acceptance of delivery.

**Deliverables**

1. Seamlessly integrate with NCA's existing IT infrastructure, with a preference for solutions that leverage Microsoft technologies.
2. Integrate and ingest data from all specified sources.
3. Implementation of a structured data modelling layer, including transformation examples (e.g., creating a transformation bronze, silver and gold layer from the ERP and PIMS system) to facilitate analytics and reporting.
4. Connect to external applications for enhanced functionality and data utilization.
5. Integrate with data visualization tool Power BI and, standardizing data modelling, and analytical practices.
6. Centralized data governance to manage, document, and ensure the quality and security of data within the platform.
7. Comprehensive user guides and training for IT personnel and administrators.

**Functional and non-functional needs:**

Requirement			NCA Evaluation	Supplier Response	
Code	Criteria	Description	Weighting ( 1: Could have / 2: Should have / 3: Must have)	Coverage (Yes   Partially   No)	Comment
F01	Infrastructure	All suggested modules shall run in Microsoft Azure, and shall run in the NCA tenant	3		
F02	Infrastructure	The services for the platform will be services that can run in the Microsoft Fabric environment and automate data flow and orchestrate workflows to streamline a data-driven lifecycle.	3		
F03	Infrastructure	The platform shall contain 3 main parts: 1) Input databases: Copy of the NCA databases, and files 2) New datasets: system to compile datasets based on one or more of the databases 3) ETL/reversed ETL: engines to deliver these datasets to dashboards and/or	2		



		<p>externale systems. Details will follow.</p>			
F04	Input database	<p>The platform shall be prepared to host all NCA databases. Current databases are: PIMS: Precio Fishbone - NGO Online - MS SQL - hosted in Azure EM: Kobo/other data collection tool database (LMS: Fabo - LearningLab ) ERP: Deltek - Maconomy - hosted in Deltec Cloud - ODBC interface CRM: Salesforce CRM: Winorg - Oracle - hosted by NCA ASP Embriq HR: Aditro/SdWorx - hosted in Aditro cloud Files: excel/csv/txt Sharepoint: content from NCA tenant Content from internet: currency rates The platform should not be limited to the databases, more systems will come</p>	2		
F05	New datasets	<p>The module must be able to copy and/or compute content from one or more databases to new datasets.</p>	3		
F06	Data ingestion	<p>Review current data integration setup (ODBC, etc.) and work (with project lead) to establish data ingestion pipelines and standardisation of data integration setup to ensure the data warehouse meets diverse needs.</p>	3		
F07	Monitoring	<p>Have scheduling and Monitoring of data pipelines and detection of breakages</p>	2		
F08	End-to-end-pilot (Proof of concept)	<p>A proof of concept which ensures combining of data from various sources and end result of data models (potentially through a dashboard)</p>	2		

F09	Data modeling	Work with project members to establish data modelling practices which ensures data models serves organisations needs and also ensures (re)usability of data tables (models) by internal stakeholders (across different divisions)	2		
F10	Data analytics	Work with project members to ensure industry leading practices are adopted for data analytics such as standardised templates, reporting practices, etc. across NCA	2		
F11	Storage	Appropriate choice of storage based on various systems	2		
F12	ETL/Reversed ETL	External applications should be able to request data from the datasets.	3		
F13	ETL/Reversed ETL	The platform must be able to push data to external systems from the datasets. (eg. financial information from Maconomy to PIMS)	1		
F14	ETL/Reversed ETL	Both push and pull must be secured with the industry best practis regarding security (ref F21/F22)	3		
NF01	Azure	All new objects, and modification of existing objects, shall be executed together will NCA/IT and Embriq - to ensure that current structure and monitoring is not comprimized	3		
NF02	Documentati on and training	The platform should be documented based on best pracsis to ensure that users effectively can utilize the data warehouse and that IT staff can maintain and extend the system as needed.	3		
NF03	Cost efficiencies and licence control	The supplier is supposed to be familiar with the non-profit-licence-structure on Ms-Fabric - to ensure the most efficient licence setup for NCA. Also optimizie operational costs, including storage costs, data processing and network expenses.	2		
NF04	Process	The supplier is supposed to organize the acitivities as workshops. This to ensure NCA staff can participate and ensure detailed knowledge on the setup of the platform	3		
NF05	Security	The best pracsis regarding security, GDPR, and all current NCA securities rules and policies in Azure shall apply.	3		

NF06	Security	Possible to manage various access levels/groups, based on input confidentiality level.	2		
NF07	Performance and Scalability	Ensure the overall platform scales seamlessly with increase in volume of data from existing and potential new systems.	2		
NF08	Maintainability	The solution must be easy to update, monitor, modify and maintain.	3		
NF09	Usability	The solution should have an intuitive user interface. IT and other administrators should interact with data fabric without extensive training.	2		
NF10	Reliability and data availability	The system must be robust, with minimal downtime, and quickly recovering from errors. Also ensuring that data is available for users and applications with minimal delay.	2		

Functional and non-functional needs excel sheet and Annex 2 will be sent as Word and excel sheet to be able to fill in.

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## ANNEX 2: PROPOSAL SUBMISSION FORM

My financial proposal for my services is as follows:

Description	Unit (e.g. once-off, monthly or annually)	CurrencyNOK	Amount
Set-up fee including technical training/orientation and learning of NCA staff.			
Design and the development costs, configurations, testing and implementation.... (Fixed price?)			
Cost of consultancy hours, junior and senior			
Documentation; detailed technical system documentation, user documentation, operation procedure and training manuals in English and Norwegian.			
Other costs, please specify			
VAT or other tax on services			
<b>Total price incl. taxes</b>			

Quotation for additional software components, if needed, to meet type (2) and (1) requirements.

Item	Description	Unit (e.g. monthly or annually)	Currency NOK	Amount
1				
2				
3				

### Other relevant information:

Please attach information/documents related to the financial statements, accreditation, policies, etc. listed in the table below.

GENERAL COMPANY INFORMATION	
Any quality assurance certification held by your company	
Trade / professional organisations of which your company is a member	
Any CSR related policies your organisation has	
Does your company live up to e.g. ISO 26000/50001/14000 standards or is SA8000 certified? Please state which.	
If you have not already provided it, please include your organization's 3 most recent audited financial statements	

REFERENCES				
Name and country of customer	Type of contract	Value	Contact name	Phone/fax and email

Include details of the experience and past performance on contracts of a similar nature within the past five years and information on other contracts in hand and/or future commitments including details of the actual and effective participation in each of such contracts, description of the Supplier's assignments and periods of engagement. Additional documents can be attached to the above form.

After having read your Request for Proposal no 2023-065 for Date warehouse Platform dated March 15<sup>th</sup>, 2024, and after having examined the Request for Proposal, I/we hereby offer to execute and complete the services in conformity with all conditions in the Request for Proposal for the sum indicated in our financial proposal.

Further, I/we hereby:

- Accept, without restrictions, all the provisions in the Request for Proposal including the General Terms and Conditions for Service Contracts.
- Provided that a contract is issued by the Contracting Authority I/we hereby commit to perform all services described in the Terms of Reference.
- Certify and attest compliance with eligibility criteria of article 33 of the General Terms and Conditions for Service.
- Certify and attest compliance with the Code of Conduct for Contractors in Annex 5.

The above declarations will become an integrated part of the Contract and misrepresentation will be regarded as grounds for termination.

Signature and stamp:

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Signed by:

**The Supplier**

Name of the company  
Address  
Telephone no.  
Email  
Name of contact person