Request for Proposal:
Enterprise Content Management Solution

May, 2013

World Vision International

STATEMENT OF CONFIDENTIALITY

All information within this RFP, regardless of the communication form, is given in absolute confidence and may not be disclosed without written permission from World Vision International.

1. Introduction

1.1 Invitation to Bid

World Vision International, together with its affiliated offices across the globe that make up the World Vision Partnership, ("World Vision") invites your organization to submit a proposal for Enterprise Content Management solution strategy based on the specifications, requirements and terms and conditions set forth in this Request For Proposal (RFP). This RFP is intended to enable World Vision to identify a service provider to supply the afore-mentioned strategy.
This RFP describes our current understanding of our global needs, however these needs are subject to change.

1.2 Information about World Vision

What World Vision is:
World Vision is a non-profit, non-denominational Christian humanitarian aid and development organization that is dedicated to helping children and their communities worldwide reach their full potential by tackling the causes of poverty. With its origins in the 1950's, World Vision is backed up by more than 2.5 million supporters, 20,000 churches, hundreds of corporations, and governments in nearly 100 countries.

Who we serve:
We serve poor children, families, and communities. Through means such as emergency relief, education, health care, economic development and promotion of justice, approximately 25,000 World Vision staff members assist impoverished communities help themselves. Our work touches approximately 100 million people in nearly 100 countries, assisting people regardless of religion, ethnic background, or gender.

Why we serve:
Motivated by our faith in Jesus, we serve the poor unconditionally, recognizing their individual dignity and honoring their God-given potential.

Some ways in which we serve:
Community Development: Each community's needs are different. We provide the resources that enable people to discover and use their own ideas and skills to move from poverty to self-sufficiency. Communities develop such things as access to clean water, reliable food production, basic health services, educational opportunities, microfinance programs to generate income, and AIDS prevention and care.

Emergency Response: We respond to natural disasters and long-term humanitarian emergencies. We track potential crises, pre-position emergency supplies for effective rapid response, and remain after the crisis to help people rebuild their communities.

Protecting Children: We believe in every child's individual worth. We advocate for their well-being: for a world where orphans are cared for; where children are no longer forced to be soldiers, prostitutes, or laborers; and where they are safe and free from oppression.

For further information, we encourage you to visit our website at www.wvi.org.

2. Project Background

2.1 Goals and Objectives

Currently, various departments and entities within World Vision International manage digital multimedia assets (photographs, audio, video, text, graphic design elements, and various documents) in a range of systems that serve different end-user groups. Eight (8) of these systems are enumerated in Appendix 2. Other systems exist in individual offices at various levels of maturity. Some may be candidates for consolidation, or outright replacement, if an effective enough global solution is offered.

These systems are in various stages of maturity. Some have been in use for several years while others are being developed.

Ultimately, World Vision International intends to integrate these systems into a single enterprise content management solution and envisions a consolidated solution that provides enterprise-wide contribution of and access to digital assets (content), encouraging the reuse & repurposing of shared content.

In addition, by consolidating to a single enterprise content management (ECM) solution, World Vision International expects to reduce costs in content acquisition and maintenance; systems and user support.

The goal of this RFP is to present <u>an approach and strategy for content management consolidation</u> including a high level timeframe and a preliminary cost estimate.

Deliverables:
1. A recommendation regarding content management consolidation and a strategy for achieving this recommendation
2. Fixed-price cost proposal and timeframe for implementing this recommendation
3. The recommendation will include a method for defining and governing enterprise taxonomy and metadata and making key decisions regarding present and future content types
4. The recommendation will include a proposed approach and principles regarding governance/oversight process, stakeholder buy-in of the ECM solution in a federated structure

The proposal will include strategies or approaches and potential tools in the following areas:

Change Management

- For stakeholder engagement, aimed at securing support for consolidation from current content and system owners
- For organizational adoption of new systems and workflow methods imposed by the consolidation

Processes
- To standardize and consolidate processes used among the current systems
- To determine consolidated system governance
- To determine content lifecycle governance
- To determine end-user governance
- To determine data governance including, but not limited to, data classification (criticality) and decisions on content data types for inclusion

Existing systems
- For migration of legacy content to consolidated system
- For the retirement of legacy solutions
- To determine the feasibility of including in the consolidation, beyond the eight initial global systems, Support Office digital asset management systems

Architectural alignment
- For aligning high level technical architecture alternatives with WVI's technical architecture direction
- To determine uniform data architecture, taxonomy and metadata for the short-, medium- and long-term

Security
- To secure sensitive or proprietary content related to the beneficiaries of WVI's work – communities, families and children – and regardless of its status (at rest, in transit, or at the endpoint) from unauthorized access and distribution

On-going resource requirements
- To determine content growth and hardware requirements
- To determine configuration options for content uploading, downloading storage, and streaming
- To determine processing options for different classes of assets (fast-breaking disaster response assets and 'normal' assets with longer lead times for completing the processing steps)
- To determine staffing requirements, skill sets and job descriptions required for the proposed consolidated system (which acknowledges the likely exponential growth in volume of assets)

2.2 RFP Timetable

EVENT	DATE
RFP Release	June 10, 2013
Vendor's Response of Intent to Bid	June, 14, 2013
Vendor's Proposal Submission	June 28, 2013
Finalist Selection	July 15, 2013
Finalist Presentations	July 29-31, 2013
Vendor Notified of Selection	August 05, 2013

2.3 World Vision Contact

Vendors will submit any inquiries, responses of intent to bid, clarification requests and submissions related to this RFP to the following WV contact:

> Yonathan E Zekarias / Bob Wilson
> **World Vision International: Global Procurement Office**
> **Email: Global_procurement_office@wvi.org**
> **Telephone: 626-805-5606**

Vendors may not enter into communications with other World Vision staff about this RFP without the prior written permission of the individual listed above.

3. Instructions for Intent to Respond and Submitting Proposals

1. It is requested that vendors notify in writing the individual listed in Section 2.3 either accepting World Vision's invitation to participate in this RFP process or expressing your intention not to participate. It is encouraged that for vendors to do so by e-mailing the Intent to Respond Form set forth in **Appendix I** no later than close of business on **June 14, 2013**. Vendors also need to designate the name of the person within their organization who will serve as the main contact for this process, along with his/her title, address, phone number and e-mail address. Vendors should agree to destroy any and all information in this document if you choose to decline participation our RFP process.

2. An exploratory conference call may be arranged to assist in the preparation of your written response and presentation/demonstration. If so, you agree to absorb any costs incurred in so doing.   Please contact the individual listed in Section 2.3 should you need such a conference call. To ensure that the same level of information is conveyed equally to all vendors, World Vision reserves the right to share questions and responses with all other vendors.

3. Vendors must submit two written hard copies and a separate electronic copy of their response, so that they are received by World Vision by close of business on **June 28, 2013**. Any response received after this date may be considered non-responsive, and World Vision would not be obligated to engage your organization any further in our RFP process.

4. All responses and supporting documentation shall become the property of World Vision and will not be returned.

5. World Vision ultimately reserves the right throughout this process to select any servicing option that best meets its business requirements and to hold discussions with any and all respondents.

6. You must agree to the following conditions if you choose to respond to World Vision regarding this RFP:

   a) Neither issuance of this RFP nor receipt of proposals represents a commitment on the part of World Vision International, World Vision or any office within the World Vision Partnership.

   b) World Vision will not be responsible for, or in any way liable for, any costs incurred by vendors in the preparation of any responses or presentations relating to this RFP.

7. This document is provided for the exclusive use of participating vendors and copies shall not be made available to any other party, without written consent from the individual listed in Section 2.3. Both vendors and World Vision acknowledge that they may come in contact with non-public information, which is considered confidential or proprietary to the other, including this document itself. Each party agrees not to use such information for its own benefit or allow it to be released to or used by others. Each party agrees to exercise reasonable care to prevent disclosure to any third party.

8. Neither party shall use the name of the other in publicity releases, referrals, advertising, or similar activity without the prior written consent of the other.

4. Required Written Response

Vendors need to respond in a format that refers to the following sections and numbered items and must specifically address each and every request for information contained herein. If you are unable to comply with any information requested, an explanation must be provided as part of the response.

4.1 Vendor Profile

1. Please provide a brief (1-2 paragraphs) background of your organization, including the year you were founded.

2. Please provide a brief (1-2 paragraphs) background of the strategy/solution you are proposing including your ECM strategy methodology.

3. Please provide the percentage of your total annual revenue that is driven by enterprise content management (ECM) related revenue (software, services, maintenance, etc.)?

4. What percentage of revenue is derived from the following:
   - Software License Fees
   - Maintenance Fees
   - Professional Services/Consulting

5. Please provide evidence of what your organization is doing to remain a viable and stable player in the ECM market.

6. Please describe the financial stability of your organization. If available, please include documentation depicting this stability.

4.2 Vendor Strategic Partnerships

1. Describe any partnerships or alliances within the ECM market from a product, technology, and business perspective.

2. Describe any business to business relationship you believe is material to this RFP

Personnel

1. Please provide the current number of employees dedicated to the strategy/solution you are proposing.

2. Please provide a breakdown of the employees dedicated to these functions:
   - Research & Development
   - Technical Support
   - Services

3. Please provide the number of offices and their locations.

4. Please provide statistics related to the number of employees your company has added over the past five (5) years.

5. Have you had to lay off any employees? If so, when and how many?

6. Provide the average employee tenure for your Technical Support team.

7. Provide the longevity, in terms of years, of your executive management team – particularly your CEO and CTO.

8. Provide consultant profiles representative of those who may be assigned to this engagement and their availability.

Competitive Analysis

1. Please list any of the relevant independent ECM analyst reports and rankings validating your strategy/solution within the ECM market (for example, Gartner Magic Quadrant for ECM, Forrester Wave for ECM Suites, Butler Group, or the CMS Watch ECM Suites Report (Real Story Group)).

2. Describe what generally differentiates you from your key competitors.

3. Describe your market share in the ECM space.

References

1. How many organizations have implemented your ECM strategies/solutions overall?

2. Provide the name of the oldest, active customer of your ECM strategies/solutions.

How many organizations have implemented your ECM strategies/solutions in the past 3 fiscal years?

3. Please describe your customer retention.

4. Please describe the customer industries you service.

5. Please provide information in relation to three (3) customers who have implemented a strategy/solution similar to your clients mentioned above. Include company name, location, inception date, and solution specifics.

6. Would you be willing to host our organization for a site visit at your corporate headquarters?

5. Evaluation and Agreement Formation

5.1 Evaluation Criteria

World Vision will evaluate proposals and select a vendor, at its discretion. A few criteria it may use, include, but are not limited to the following:

1. Quality, reputation and performance of providing an integrated Enterprise Content Management strategy/solution in a global environment. World Vision requires an opportunity to evaluate models/samples for testing.

2. Thoroughness of proposal preparation.

3. Demonstrated excellence in service, support and extended warranties on a global basis.

4. Competitive pricing with the capacity to provide advance and locked global pricing as part of a very demanding marketing schedule.

5. Ability to deliver the requested goods and/or services by the required dates.

6. Ability of the selected vendor to work with World Vision to develop a co-marketing program directed at the global World Vision offices and capacity to creatively sustain the marketing strategy over the duration of the relationship with World Vision.

7. Capability of vendor to identify all elements leading to understanding of the actual landed costs by region/country and establish lead-time and fulfillment objectives.

8. Demonstrated ability to provide International account coordination and consolidated purchase reporting for World Vision management while enabling use of local accounts, support and services in our global areas of operation.

World Vision may require an oral presentation by vendors after written proposals are received and reviewed by World Vision. If World Vision requires such a presentation, the Global Procurement Office will schedule a time and place. Each vendor should be prepared to discuss and substantiate any of the areas of the proposal that is submitted, its qualifications for the services required and any other area of interest relative to its proposal.

5.2 Agreement Formation

All proposals received will be carefully evaluated by World Vision. World Vision will then select two or more firms deemed to be fully qualified and best suited among those submitting proposals, on the basis of evaluation criteria described above. World Vision will then conduct negotiations with the selected vendors. After negotiations have been conducted, World Vision will select the

vendor or vendors that, in its opinion, have made the best overall proposal and execute a written agreement based on this RFP, the proposal submitted, and the negotiations concerning these.

Issuance of this RFP, the preparation and submission of responses by vendors and the subsequent receipt and evaluation of responses by World Vision shall not commit World Vision to award a contract to any vendor. Furthermore, in no event shall choosing a specific vendor for presentation, negotiations or otherwise be construed to create any legal obligations on the part of World Vision. Only the execution of a written agreement by World Vision International, World Vision or an office within the World Vision Partnership and a vendor will be binding on the relevant parties in accordance with the terms and conditions contained in such agreement.

World Vision

Appendix 1 – Intent to Respond Form

RFP: Enterprise Content Management Solution

To: **Yonathan E Zekarias/ Bob Wilson**
            Global_procurement_office@wvi.org

From: Company Name: _____

            Contact Name: _____

            Address: _____

                               _____

            Telephone: _____

            Fax: _____

            E-Mail: _____

Please state your intentions with regard to this RFP by checking one of the boxes below:

❑   We intend to respond to this RFP by June 28, 2013

❑   We are not responding to this RFP and will destroy all associated materials.
            The reason we have decided not to respond is:

            _____

            _____

            _____   _____
                   Signature of Contact Person   Date

Appendix 2- Supplemental Material: Current Digital Content Management Systems

<u>Eight Digital Asset Systems</u>

1. Photo, Video Library (communications professional assets) [Digital Media Centre (aka Merlin Photo Library) (MerlinOne), launch 2004]
   - Photos, Videos
   - 500,000 active, 2 million archived items
   - Commercial application; Vendor hosted, SaaS – same vendor as number 2 below, separate repository

2. Photo, Video and Text Library (non-communications professional assets) [Casual Media Library (Merlinone), launch 2013]
   - Photos, Videos, Text
   - 100's of items (in process of launching)
   - Commercial application; Vendor hosted, SaaS – same vendor as number 1 above, separate repository

3. Story workflow and storage [Share, launch 2007]
   - Assignment database and workflow, story summaries
   - 2000 to 2500 assignments per year
   - Custom application; Windows, .NET 4, SQL Server
   - Externally hosted

4. Emergency response information (text documents breaking news updates) [WV relief, launch 2008]
   - Text documents, breaking news updates
   - 77 MB, estimated 10% annual growth
   - Custom application; Linux, Joomal CMS; PHP MYSQL
   - Externally hosted

5. Corporate intranet (Sharepoint CMS) [wvcentral.org, launch 2010]
   - Consumer of digital media assets (but stored locally because there is no integrated interface)
   - Custom application; SharePoint
   - Internally hosted

6. Corporate external website (Drupal CMS) [wvi.org, re-launch 2013]
   - Consumer of digital media assets (but stored locally because there is no integrated interface)
   - Custom application; Drupal CMS
   - Externally hosted

7. Marketing rich media assets [FIP/Rich Media Transfer, launch 2012]
   - Photos, Videos

- Target growth: 75,000 videos, 1 million photos per month (in early stages of production)
- Custom application; SharePoint; .NET and Android; TIBCO services
- Internally hosted custom web and FTP services; internally hosted data staging servers; externally hosted data

8. Field Programs monitoring and evaluation system [Horizon, STEPwise]
   - Consumer of digital media assets (but stored locally because there is no integrated interface)
   - Custom application; SharePoint
   - Internally hosted