
Request for Proposal (RfP)

Custom Development of Odoo Project (Community Version) for humanitarian and development project management purposes

Date: 13 Nov 2024

About us

Malteser International (MI) is an international non-governmental organization that provides humanitarian services to people in need around the world. Currently, MI has 1,200 employees, is working in 37 countries in 145 projects, cooperating with around 100 partner organisations. Within this organization, the office for Digital Transformation & Innovation (DT&I) strives help MI to become the most digitally advanced humanitarian aid organisation in the world, so that we can save lives and make the greatest amount of difference to those who suffer. DT&I runs rapid prototypes with our staff in real-world settings to facilitate data-driven decision making regarding the solutions that we are testing. We have a strong focus on delivering value to our organisation, and delight to our staff through digital Products.

Challenge space

MI has, to date, relied upon Microsoft Excel for its Program and Project management. Standard operational procedures or humanitarian aid best practices are being recorded in Microsoft Word documents. Consequently, we discovered that there is no;

- single source of truth,
- consistent standardised structure,
- standardised processes,
- governance.

With this information, DT&I embarked on identifying and prototyping Program and Project Management tooling. MI has concluded a discovery of the community version of the ERP software Odoo. A focus was set on the Project module. Outputs were a compilation of MI's requirements for a Odoo Project software including user stories (Annex 1.1) with epics (Annex 1.2), a data model (Annex 1.3), user roles (Annex 1.4) and a proposed implementation path (see this RfP).

The focus of the next phase is to provide offers to work with MI in:

- Building a community version of the Odoo Project module matching the needs of MI
- Implementing an intensive feedback & testing phase of the Build with selected user groups of MI (ca. 2-3 projects with ca. 75 users).
- Incremental operationalisation of the developed product
- Roll-out of the Software in MI. For full scope of roll-out please refer to "About Us". However, the roll-out will be phased and is envisioned to rely on focal persons that pass on the knowledge.
- Host and maintain the software

- First level support for the software

All insights gained by DT&I relevant to the success of this rapid prototype will be made available.

Overall Objective

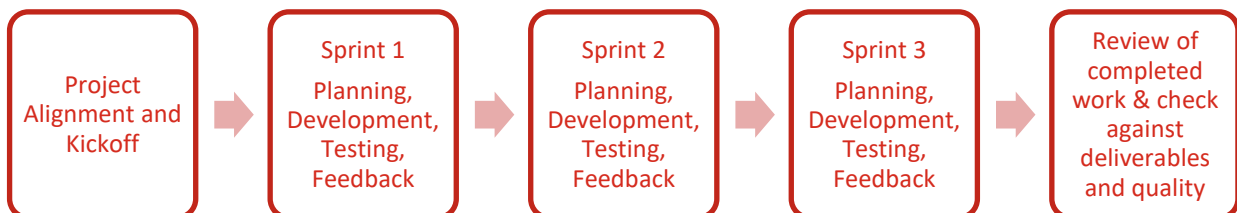
- Fulfil the identified needs of Malteser International in digitalising Project and Portfolio Management including mobile app offline data entry based on established user stories, epics and acceptance criteria.
- For full scope of the software roll-out please refer to “About Us”. However, the roll-out will be phased and is envisioned to rely on focal persons that pass on their knowledge. Further, it is envisioned to integrate only new projects so that the growth to full scope will naturally take time.

Modular Sub-Objectives and Deliverables of the Proposal

The proposal is expected to be clustered based on the below listed 8 Modules including a transparent pricing for each module outlining expected time and material. Please find attached an illustration of the envisioned process (Annex 2). Stand-alone proposals only covering Modules 1 to 3 or Module 4 to 8 can also be submitted. In case of convincing stand-alone submission of Modules 1 to 3 or Module 4 to 8 a modular contracting can be considered.

Module 1a (Experiment Phase Part 1) (6-7 weeks):

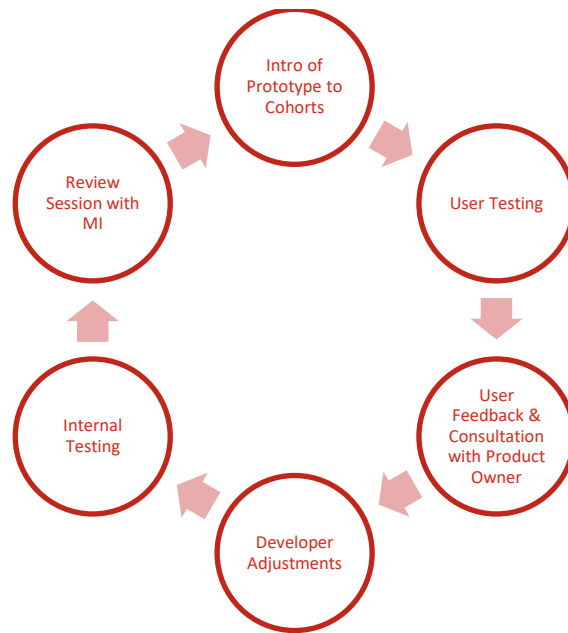
A 6-week development phase plus five working days for alignment between selected partner and MI and review based on provided user-stories (Annex 1.1), data model (Annex 1.3), and user roles (Annex 1.4). (3 sprints of 2 weeks each)



Logic of Module 1 Experiment Phase 1

Module 1b (Experiment Phase Part 2) (6-7 weeks):

6-week rapid feedback period during which the result of the Experiment Phase Part 1 is thoroughly tested with two or three cohorts with up to 75 users.



Decision Gate 1: The completion of module 1 triggers a decision-gate in which the partner and MI decide whether and how to continue.

Acceptance criteria for the experiment phase (Modules 1a & b):

- Functional completeness of all user stories.
- User-friendly interface with intuitive navigation.
- Accuracy and integrity of data processing, storage, and reporting based on MI reporting requirements incl. visualisations.
- Security and compliance with data protection regulations
- Role-based access control to ensure appropriate data visibility for different user roles.

Module 2 – Operationalisation light (4 weeks):

Operationalisation of the software in 5-6 projects and observation of results to inform decision making on full roll-out or further experimentation.

Decision Gate 2: The completion of module 2 triggers a decision-gate in which the partner and MI decide whether and how to continue.

Optional Module 3 – Optional Additional Experimentation (4 weeks):

If the evaluation of the Module 2 output—ensuring all quality requirements are met per the criteria in Annex 3—determines that the software is still not fully ready, an optional four-week experimentation phase may be initiated. This phase will be tailored to address the specific needs identified in the evaluation. Given its optional nature, conducting Module 3 would extend the overall timeline and delay the subsequent modules which is to be reflected in the proposal in terms of time schedule and pricing.

Optional Decision Gate 3: The completion of module 3 triggers a decision-gate in which the partner and MI decide whether and how to continue.

Module 4 – Software Roll-Out

Provide a comprehensive plan detailing the proposed approach for a full software roll-out, including a breakdown of costs and technical specifics (see requirements in Annex 4).

Module 5 – Hosting

Submit a detailed cost proposal for hosting the software, covering all expenses and technical aspects required for adequate hosting (see requirements in Annex 4).

Module 6 – Maintenance

Present a cost proposal for maintaining the software, including a full breakdown of maintenance expenses and technical details (see requirements in Annex 4).

Module 7 – Onboarding Sessions for MI Staff

Provide a cost proposal for conducting onboarding sessions for MI staff, including all associated costs and session details (see requirements in Annex 4).

Module 8 – First-Level Support

Deliver a proposal for first-level support services for the software, with a complete outline of costs and service level details (see requirements in Annex 4).

Call for Proposal

We invite Odoo-specialized service providers to submit proposals for this project. Each proposal should provide detailed conceptual and financial breakdowns of the eight individual modules involved. Please submit proposals by end of business on 22 November 2024. The project is scheduled to commence on 27 November 2024.

Deadline for questions regarding the RfP is 19 Nov. All answers provided so far will be made available upon request.

Please find the criteria for selection in Annex 5.

Contact Information

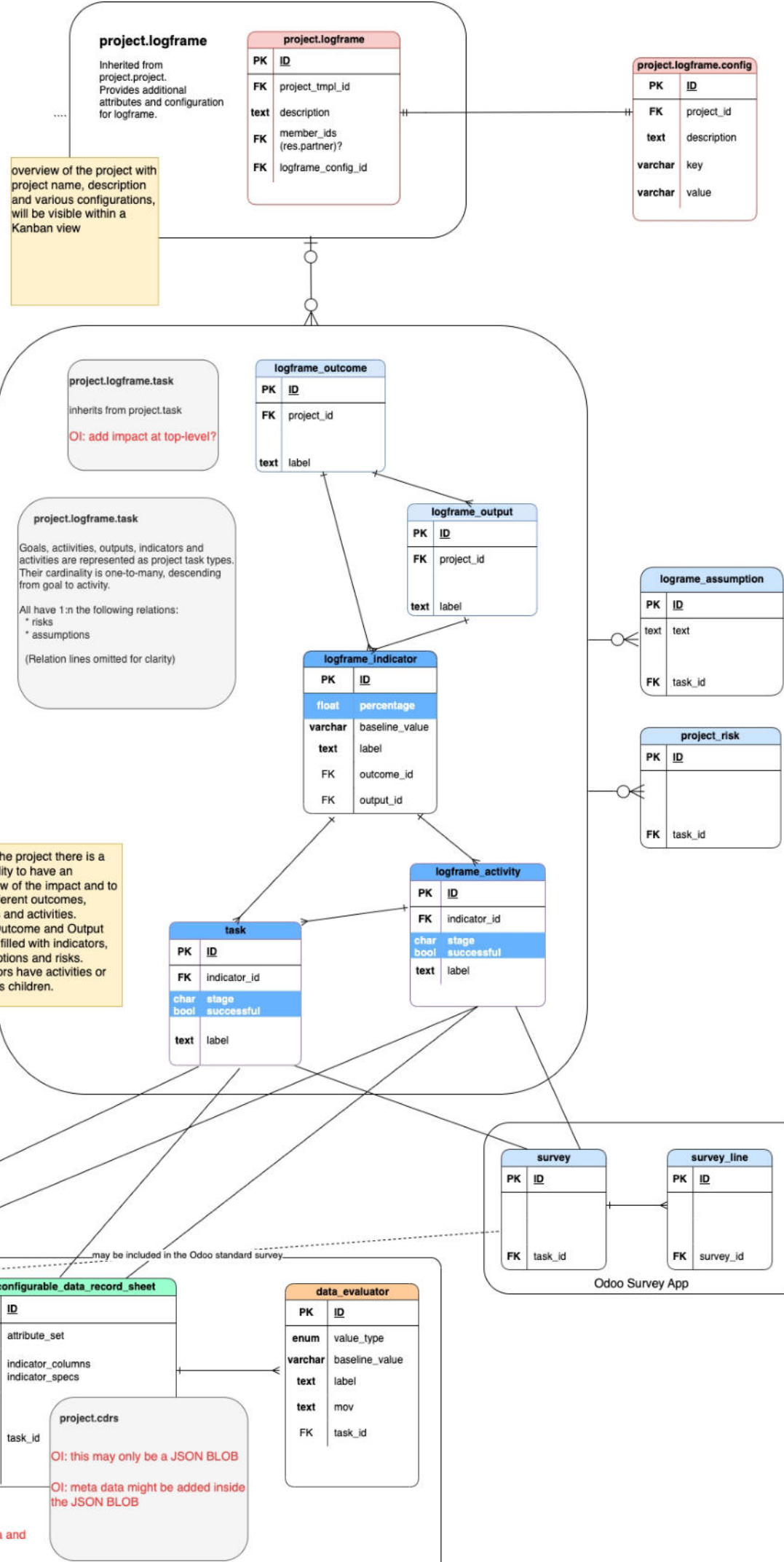
Julian Fellendorf – Global PME & Digitalisation Advisor and Product Owner for this Product.
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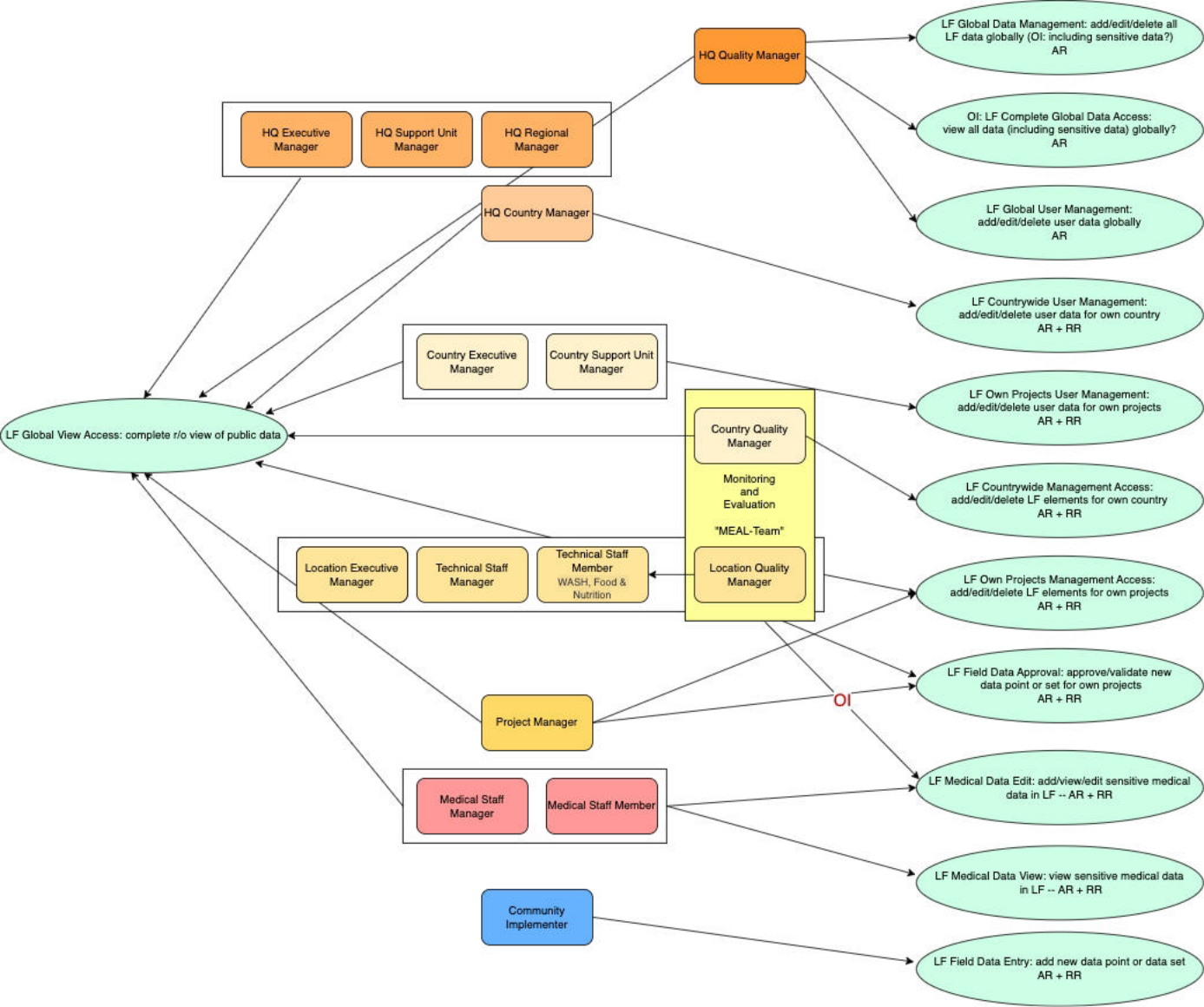
Explanation:

- As a basis for the management of logframe-based projects, Odoo's Project module can be utilized. The elements of the first column of the logframe and their relationships to each other can be represented as extended types of Project Tasks. Impacts, *Activities*, *Outputs* and *Outcomes* may be viewed and edited in the project kanban view and form views. An inline editable tree view might be used to represent the relationship between first-column entities and indicators.

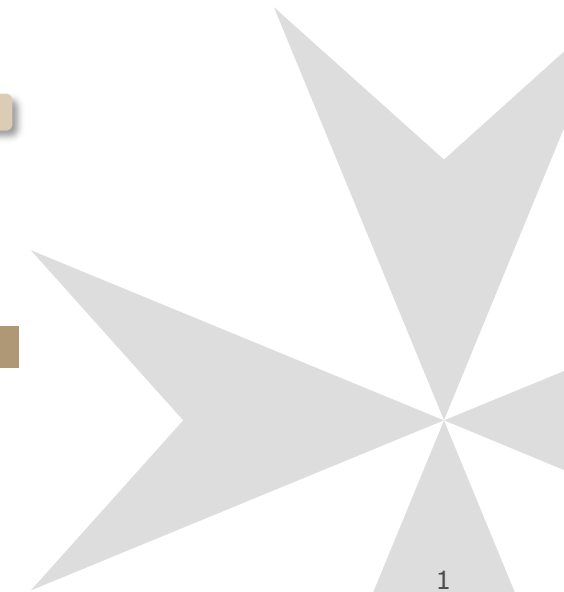
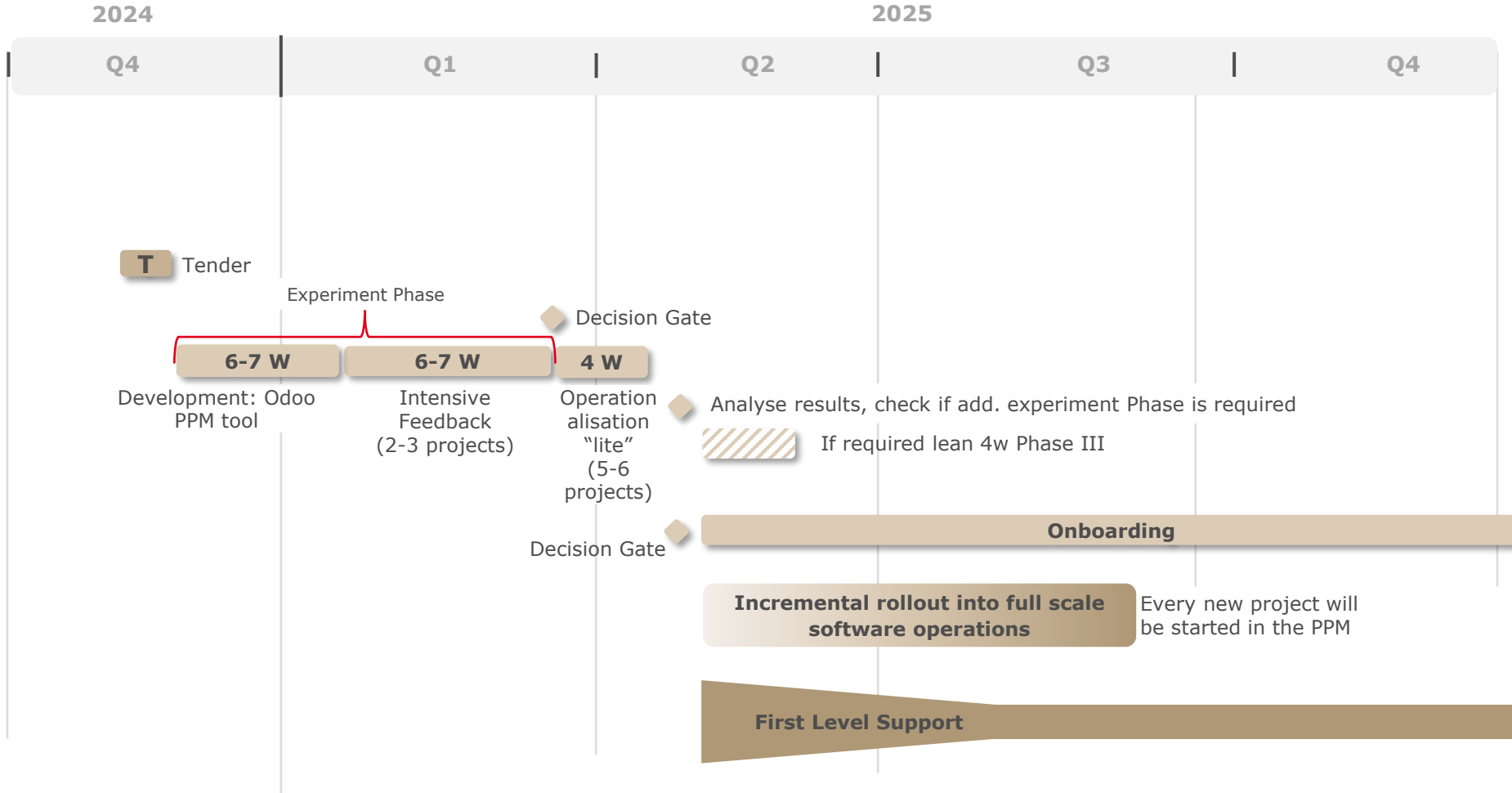
Components

- Logframe Visual Interface
- `project.task.kanban_view` Overview of activities and their progress or status
- `project.task_form_view` Editing view for task-based objects (Activities, Outputs, Outcomes, Goals)
- `project.logframe.logframe_view` Logframe Raster View
- Logframe Model:
 - `project.project` provides general attributes and methods for projects and classical task-based management
 - `project.task` provides basic attributes and methods for managing tasks within a project
 - `project.logframe` inherits `project.project`, provides additional features:
 - `logframe_configuration`: column labels, order, types
 - `logframe_reports`: templates for data export (CSV)
 - `project.logframe.task` inherits `project.task`, provides additional features:
 - special task types: activity, output, outcome and indicator
 - parent_child relationship: outcome *has* one or more outputs, output *has* one or more indicators with activities, outcome has one or more indicators with tasks
 - assumptions
 - `project.logframe.indicator`
 - baselines
 - types
 - periods
 - values
- `Project/Task Risks` provided by https://github.com/OCA/project/tree/11.0/project_risk
- `Task-Risks` Extension of project risks





Envisioned Timeline



Annex 3

Acceptance criteria

Before acceptance, all critical and major bugs must be resolved, with no issues affecting core functionality. Minor bugs should not impact overall user experience.

Additionally, user acceptance testing (UAT) will be conducted by the client to verify that the module meets all expectations. Feedback from this phase will be incorporated before go-live approval. The acceptance of the software will be based on the completion of several critical criteria, ensuring that the final product meets the functional, technical, and usability requirements. These criteria encompass the full scope of the project and serve as the baseline for validating that the module is ready for deployment.

First, the module must be functionally complete, with all user stories from the backlog fully implemented. This includes key functionalities such as Outcome/Output/Activity Set-up, Indicator Management and Activity Monitoring, which must work as described without critical issues. Additionally, the user interface (UI) and user experience (UX) must be intuitive and user-friendly. Users should be able to navigate the module seamlessly, completing tasks efficiently and without confusion. The accuracy and integrity of data within the module are also essential. All data must be correctly processed, stored, and reported, exportable with proper validation checks in place to ensure the completeness and accuracy of the information. Security and compliance with relevant data protection regulations must also be ensured. Role-based access control will be implemented to guarantee that users only have access to data and functionalities appropriate for their roles. Where relevant, the module must integrate seamlessly with other Odoo modules or external systems, ensuring correct data synchronization without errors or loss.

Before acceptance, all critical and major bugs identified during testing must be resolved, ensuring the module operates without significant issues. Any remaining minor bugs should not impact the core functionality or overall user experience.

Visual Design & UX Acceptance Criteria

The application has two parts – a. The Backoffice, where the project is managed and overlooked in the sector-specific logframe logic and b. an android mobile application which enables individual and task specific data input into the logframe. Both are to be specifically crafted by the requirements of MI and are iterated further in the project to fit the needs of the users. Goals for the design are:

- Ease of use
- Pleasant UI
- As little elements as possible and as much data as needed
- Collaboration
- Awareness of state
- Focus on time sensitive elements
- Personalization

Annex 4

General FAQ

- What unit of use is desired? (user, devices, facilities, clients/patients, etc.)
 - Users
- What is the anticipated number of usage units?
 - 500 assuming a 10% growth rate after full operationalization
- What minimum number of usage units can be guaranteed? (minimum order quantity)
 - Ca. 75
- What is the planned usage period?
 - PPM is intended to be used in perpetuity
- From which organizational units do the users originate?
 - Malteser International & partner organizations
- Is a data processing agreement (DPA) required with the manufacturer?
 - Yes
- Is there any specific requirements regarding software development?
 - Yes:

Malteser International is a sponsor of Free and Open Source Software, and we expect our partners to communicate their best practices in open source software maintenance and coding (e.g. modular code, readable code, code documentation in-line, project documentation .md files, version control, linting etc.), preferably referring to externally accessible authoritative best practice documentation.

1. Firstly, the partner is expected to leverage existing FOSS modules wherever possible.
2. Where a FOSS module exists, but does not cover the full requirements, the partner is expected to contribute an extension, sub-module or improvement to that existing module.
3. In the case where no relevant FOSS module exists, the partner must evidence that due diligence has been carried out, prior to beginning custom development.
4. All custom development generated during this engagement is to be published to the public domain under GNU General Public License v3, attributed: "Developed by X, Sponsored by Malteser International".

Technical Requirements

!!! Note: The technical requirements provided below represent a guidance to you, our prospective Partners. Improvements, additions or amendments are permitted and encouraged; however, you must clearly indicate changes and provide an explanation why the alternative is proposed (cost efficiency, effectiveness, stability, security and modularity being primary measures).

Regarding technical architecture or technical stack descriptions, we have provided examples of vendor products in brackets (e.g. AWS Fargate). The vendor products have been selected primarily from Amazon Web Services (AWS). AWS does not necessarily represent MI's preference but is used solely for demonstrable purposes in this document. Typically, MI's preferred technology vendor is Microsoft.

Respecting the aforementioned indication of changes and inclusion of explanations, you are free to propose alternative architectures and/or vendor products.

We request any acronyms used to be explained in a glossary.

Module 5 – Roll-out of Software - requirements:

- Managed container orchestration platform for the Odoo application
- Managed Postgresql (AWS Relational Database Service) with dedicated hot standby instance and Write-Ahead Log archiving.
- Time Recovery (Point In Time Restore).

- Odoo Filestore storage stored on distributed multizone filestore (AWS Elastic Block Store)
- Multizone load balancer and SSL proxy (Elastic Load Balancing/Application Load Balancer) or using NGINX (caching, header metadata, load balancing and session management)
- Content Delivery Network set up and management (AWS Cloudfront)
- Encrypted (at rest and in transit) database and document filestore (AWS Key Management Store)
- Rolling backups and snapshots
- Integrated monitoring & logging
- Secure access control with fine-grained permissions for services and users. (Identity & Access Management)

Module 6 – Hosting - requirements:

- What server infrastructure is needed? (system requirements)
 - E.g. x86-64 container runtime: Generation of an MI Odoo distribution in Docker images, which include the Odoo core application, add-ons and the multiworker HTTP server. The images can be operated on any common container platform: Docker, Kubernetes, AWS Elastic Container Service, Elastic Kubernetes Service, Google Kubernetes Engine, Azure Kubernetes Service, etc.
 - scaled average of 20 hours of active system usage for each user
 - e.g. Odoo-Container-Hosts: 42 vCPUs, 27 GB RAM
- How much storage is required, and what is the projected growth?
 - File storage: Initial volume 10 GB, annual growth 10 GB
 - 10% growth expected
- Is a database required? (Which one? Version? Storage needs?)
 - Odoo is usually operated with PostgreSQL, currently with version 14.
 - E.g. 2 x AWS Relational Database Service (4 vCPUs, 16 GB RAM per instance), initial 0,5 GB, annual growth ca. 1 GB
 - Updates are carried out as required (usually every few years). The memory requirement naturally depends heavily on the number of parallel users.
- Is SSO integration (Entra ID) needed?
 - Yes (OAuth).
- Is a web server needed? (Which one? Version?)
 - Odoo itself is a web server and is usually supplemented by a proxy server (e.g. NGINX).
- Is an SSL certificate required? (Type? Duration?)
 - Yes. Type: Wildcard. Duration: Maximum duration, renewed in perpetuity.
- Will there be internet access to the system? (number of concurrent sessions? projected data transfer volume?)
 - Yes. Real world data is to be collected by the through experiments in the next months. Please assume your best guess based on already provided information.

Module 7 – Maintenance (managed service) - minimum requirements:

- Are there any specific maintenance concepts and pricing required as part of the full-stack Managed Service proposal?
 - Yes, at least;
 - Application of security hot fixes,
 - Application of minor version upgrades,
 - Application of major version upgrades,
- Is there a specific Backup cadence requirement?

- Yes, at least;
 - full backup weekly,
 - differential backup daily,
 - full offsite backup monthly,
 - testing of backups quarterly.

Module 8 – Onboarding Sessions for MI Staff FAQs:

- Are there any expectations regarding user onboarding?
 - Yes;
 - User onboarding is to be provided in English, French and Spanish,
 - We prioritise automated and guided user onboarding (e.g. userflow) experiences,
 - A planned roadmap to limit the number of virtual user onboarding sessions.
 - Any virtual user onboarding sessions must be recorded and provided to MI training center team.
 - Nice to have: Professional dedicated user onboarding recordings (with no audience).
 - Any virtual user onboarding sessions are to be offered according to the appropriate time zones of the targeted user group and in the appropriate language (e.g. Latin America user group onboarding is in Spanish at 1000 GMT-5).

Module 9 – First Level Support FAQs:

- What language and time zone coverage does the first level support need to be?
 - Service needs to be in English, French and Spanish
 - Service to be provided Monday to Saturday covering business hours of all time zones
- What is the expected workload of the first level support?
 - Provide an informed estimate of what amount of service requests (tickets) you expect for the first days and six weeks of the full operationalisation and then annually after full operations. Make the composition of the total cost estimate transparent by indicating how much time you calculate per ticket resolution and what the hourly rate of service personnel is.
- What support services are desired from a first level Support desk?
 - User Account Assistance, User Access Assistance, User Application Usage Assistance, Basic Troubleshooting.
- What support services are desired from application support?
 - Managed container orchestration platform for the Odoo application
 - Managed Postgresql (RDS) with dedicated hot standby instance and WAL archiving for Pointin-
 - Time Recovery (PITR).
 - Odoo Filestore storage stored on distributed multizone filestore (EBS)
 - Multizone load balancer and SSL proxy (ELB/ALB) or using NGINX (caching, header metadata, load balancing and session management)
 - Encrypted (at rest and in transit) database and document filestore (KMS)
 - Rolling backups and snapshots
 - Integrated monitoring & logging
 - Secure access control with fine-grained permissions for services and users. (IAM)
- Are there special requirements regarding response/recovery times (SLA)?
 - The following information are estimates that are only meant to support a cost estimate:

- Critical issues (high priority)
 - Response Time: Within 1 hour.
 - Resolution Time: Up to 4 hours to minimize disruption and quickly restore essential functions.
- Moderate issues (medium priority)
 - Response Time: Within 2-4 hours.
 - Resolution Time: Within 1 business day, as these do not critically impact operations.
- Minor issues (low priority)
 - Response Time: Within 24 hours.
 - Resolution Time: Within 3-5 business days
- Service to be provided in English, French, Spanish
- Service to be provided Monday to Saturday covering business hours of all time zones
- Should/can certain support services be excluded? (e.g., no support for usage on personal devices)
 - No
- What support services does the client provide? (e.g., key users, coordinators, multipliers, etc.)
 - Malteser International will have a small number of internal staff members (~3) with Administrative access to the Application only.
 - Each country/region unit will have one focal person that coordinates his country or region.

Annex 5 – Selection Criteria

Qualitative Parameter	Organisational capability of delivering functioning software within 3 months supported by proposal and related past work e.g. in the form of copies of service contracts with scope of work.
	Organisational capability of rapidly integrating user feedback during 1 months of usage supported by proposal and related past work e.g. in the form of copies of service contracts with scope of work and/or references
	Organisational timezone coverage
	Relevance and quality of proposal to our stated Product goals and ways of working
	Comprehension of and consent to our Product goals and ways of working reflected in a detailed, comprehensive narrative and financial proposals
	Proposed Team capacity and relevance (how many people are assigned in the Proposal) supported by CVs of assigned team members
	Organisation track-record of working with International Non-Governmental Organisations
	Proposed Team English proficiency (incl. understandability of accent, comprehension etc)
	Proposed Team French proficiency
	Proposed Team Spanish proficiency
Quantitative Parameter	Cost Analysis: Total Cost for delivering all modules
	Cost Analysis: Total Cost for Module 1 & 2
	Cost Analysis: Total Cost for Modules 3
	Cost Analysis: Total Cost for Modules 4, 5, 6, 7, and 8