⁂ ICCROM

Annex II

TERMS OF REFERENCE

1. Background Information and Aim of the Project

ICCROM is an Intergovernmental Organization working in service to its 138 Member States to promote the conservation of all forms of cultural heritage in every region of the world.

For more than six decades, ICCROM has partnered with Member States to support them in safeguarding heritage within their borders and beyond. Working at the international and governmental levels, and with institutions and professionals on the ground, the organization engages and informs new generations of professionals and the general public with an interest in heritage.

The only institution of its kind in the world, ICCROM is small and agile, enabling it to respond swiftly to the needs of its Member States.

As part of ICCROM's ongoing Digital Transformation and our commitment to operate within a harmonized, agile, and efficient business model, driven by transparency and accountability principles, there is a recognized need to move towards a more integrated IT ecosystem. This should encompass critical processes and information related to strategic planning, derived programs and projects development and monitoring, and budget implementation. Additionally, the full integration of HR processes and information into the same IT system is deemed essential for comprehensive organizational efficiency.

Currently, ICCROM operates with multiple standalone information systems, lacking integration and resulting in fragmented data across various platforms. The lack of integration and existing gaps in some of these systems pose challenges in obtaining a holistic view of organizational performance.

The tender aims to solicit proposals from qualified companies to:

1. conduct a thorough assessment of ICCROM's current IT systems and business processes, focusing on:

   a. **First deliverable**: an evaluation of the current ERP system, used mainly for accounting and financial management, including its effectiveness and proposing alternatives that better meet ICCROM's requirements.

   b. **Second deliverable**: an assessment of all other IT systems and business processes in use.

2. develop three (3) alternative scenarios for each expected deliverable (from the least to the most demanding), with associated budget estimates. The scenarios to be implemented must be tailored to ICCROM's business needs.

2. Objectives

The objective of these ToRs is to identify a qualified company to carry out a two-phase feasibility study for the development of a unified and integrated IT environment, as part of ICCROM's Digital Transformation Strategy. The study aims to:

- Enhance ICCROM's internal business model;

- Ensure higher standards of compliance and performance;

- Improve efficiency, agility, accountability, transparency, and responsibility;

- Reduce reliance on fragmented, outdated and isolated systems;

- Enable better data reconciliation and decision-making.

3. Scope of work

Within this context, the scope of work is divided into two main deliverables:

Deliverable 1: Assessment of the current ERP system
To be delivered within two (2) months from the contract signature. This phase includes:

1. **Assessment of the current ERP system**

   a. Review the current ERP used mainly for accounting and financial management;

   b. Evaluate its effectiveness in meeting ICCROM's needs and constraints;

   c. Propose at least three (3) possible alternatives more aligned with ICCROM's size, structure, and requirements.

2. **Final presentation of results**

   a. Present the findings in a meeting with ICCROM stakeholders;

   b. Submit all deliverables in digital format, including all supporting materials (PowerPoint, Excel, PDF, etc.).

Deliverable 2: Evaluation of the overall IT environment and integration options
To be delivered within five (5) months from the contract signature. This phase includes:

1. **Assessment of all other IT systems and business processes:**

   a. Conduct a thorough review of all systems and processes beyond the ERP;

    b. Collect input from key stakeholders to understand operational needs and limitations;

    c. Identify inefficiencies and gaps, especially in strategic planning, project management, MEL, finance, and HR.

2. **Identify opportunities for integration:**

    a. Propose areas where integration would bring the most value;

    b. Assess the feasibility of a single integrated IT system or modular/complementary systems;

    c. Evaluate the impact on key functions (strategic planning, project management, MEL, finance, HR);

    d. Ensure alignment with ICCROM's constraints and objectives.

3. **Innovation and modernization:**

    a. Identify opportunities to innovate our operating model, focusing on people, technology, processes, and data management;

    b. Explore the use of emerging technologies (e.g. AI) to support integration and improve performance;

    c. Assess the operational impact of these innovations.

4. **Development of scenarios:**

    a. Develop at least three (3) distinct and feasible scenarios for implementing an integrated IT environment, each with a different level of ambition and complexity;

Moreover, in order to support the feasibility of the three (3) scenarios, the selected company, in close collaboration with ICCROM Secretariat, will:

    b. Conduct a benchmark analysis, showcasing results from similar projects completed for organizations comparable to ICCROM, particularly those facing integration challenges and using multiple standalone IT systems;

    c. Include organizations such as Intergovernmental Organizations (IGO) or Agencies of the United Nations (UN) to provide a relevant and comprehensive comparison.

    d. Identify best practices and lessons learned from these organizations to inform ICCROM's integration strategy.

e. Provide specific recommendations based on this analysis to enhance ICCROM's integration plan.

5. **Final presentation of results**

a. Present the findings in a final meeting with ICCROM stakeholders;

b. Submit all deliverables in advance in digital format, including all supporting materials (PowerPoint, Excel, PDF, etc.).

4. Support provided by ICCROM

While the awarded company will be responsible for delivering all activities under these ToR, the ICCROM Secretariat will play an active role in supporting the project in the following way:

a. Provide inputs to the list of proposed interviewees and participants in the consultation.

b. Provide feedback on questions for interviewees.

c. Shadowing or leading select interviews.

d. Support the moderation of the consultation (as appropriate) and the benchmark analysis.

e. Review drafts and provide substantive feedback.

5. Expected duration of the assignment and deliverables

The expected duration of the project shall not exceed five (5) months from the date of contract signing. The first deliverable should be provided within two (2) months from the contract signature and the last deliverable within five (5) months.

Deliverable no. 1 (ERP study)

The first deliverable, to be provided within two (2) months from the contract signature, is a study outlining possible options (at least three scenarios) to replace the current ERP system with a solution better suited to ICCROM's business needs, requirements, and organizational size.

Deliverable no. 2 (Integrated IT environment)

The second deliverable, to be provided within five (5) months from the contract signature, is a proposal of three (3) scenarios for the development of an integrated IT environment.

6. Minimum Qualifications

The bid may be submitted by any organization (company, research institute, etc.) that meets the minimum requirements described below:

a. A minimum of five (5) years of proven experience in conducting IT systems assessments for organizations of similar scale and complexity.

b. Demonstrated expertise in developing and implementing integration plans for diverse IT environments, in line with the relevant business model, with minimum three (3) contracts of similar nature and complexity implemented over the last ten (10) years.

7. Submission Requirements

Technical Proposal

1. Company Profile and Relevant Experience:

   a. Detailed profile of the company, highlighting relevant experience in similar projects.

   b. A brief resume and qualification of the team's members who will be conducting the study, including the roles and responsibilities.

2. Proposed methodology:

   a. Detailed methodology for conducting the assessment and developing the three (3) distinct integration scenarios ranging from least to most demanding, each with clear objectives, benefits, and limitations.

   b. Definition of the criteria for evaluating strengths and limitations of each scenario proposed, including a risk assessment and mitigation strategies.

   c. Detailed timeline including key milestones and deliverables for each project phase.

Economic Proposal

3. Submit a:

   a. Comprehensive budget breakdown covering all associated costs, with a detailed breakdown of costs per item and stated in EUR. Please separate the value of VAT from the taxable amount.

   b. Please detail fee for the activities under each project stage/milestone and provide the daily rate of each team member who will be conducting the study.

   c. Please indicate, if any, the cost of benchmarking analysis separately from the budget breakdown.