



18 May 2016
Ref.: RFP 2016/008

Request for Proposal (RFP) 2016/008

Portfolio Management Solution for the Green Climate Fund

1. Background

1.1 The Green Climate Fund (the “GCF”) was established in December 2010 with the purpose of making a significant and ambitious contribution to the global efforts towards attaining the goals set by the international community to combat climate change. In the context of sustainable development, the GCF will promote a paradigm shift towards low-emission and climate-resilient development pathways by providing support to developing countries to limit or reduce their greenhouse gas emissions and to adapt to the impacts of climate change.

1.2 The GCF was designated as an operating entity of the financial mechanism of the United Nations Framework Convention on Climate Change (“UNFCCC”). It is governed and supervised by a Board that has responsibility for funding decisions pursuant to the Governing Instrument for the Green Climate Fund. It is supported by an independent Secretariat, accountable to the Board, having management capabilities to execute day-to-day operations of the GCF, providing administrative, legal and financial expertise. The GCF’s headquarters are located in Songdo, Incheon City, Republic of Korea.

2. Invitation

2.1 Through this request for proposals (“RFP”), the GCF is seeking to procure Portfolio Management Solution.

2.2 Sealed Proposals must be submitted to the address below no later than 8 June 2016 15:00 pm (Korea Standard Time).

2.3 This RFP includes the following annexes:

Annex I	Statement of Work
Annex II	Technical Proposal
Annex III	Financial Proposal
Annex IV	Company Profile Form
Annex V	Acknowledgement Letter
Annex VI	Timeline
Annex VII	Evaluation Criteria
Annex VIII	Main Functionalities

Annex IX	Dashboard/Portal Minimum Requirements
Annex X	Relevant Board Documents
Annex XI	Technical Evaluation Criteria Form
Annex XII	Concept Note Template
Annex XIII	Funding Proposal Template

2.3 The terms set forth in this RFP, including all the annexes listed above, will form a part of a contract, should the Secretariat accept your proposal. Any such contract will require compliance with all factual statements and representations made in the proposal, subject to any modifications agreed to by the Secretariat in writing in the context of any negotiations entered into by it.

2.4 The GCF may, at its discretion, cancel the requirement in part or in whole. It also reserves the right to accept or reject any proposal and to annul the selection process and reject all proposals at any time prior to selection, without thereby incurring any liability to proposers/firms.

2.5 Proposers may withdraw the proposal after submission provided that written notice of withdrawal is received by the GCF prior to the deadline prescribed for submission of proposals. No proposal may be modified subsequent to the deadline for submission of proposals. No proposal may be withdrawn in the interval between the deadline for submission of proposals and the expiration of the period of proposal validity.

2.6 All proposals shall remain valid and open for acceptance for a period of 120 calendar days after the date specified for receipt of proposals. A proposal valid for a shorter period may be rejected. In exceptional circumstances, the GCF may solicit the proposer's consent to an extension of the period of validity. The request and the responses thereto shall be made in writing.

2.7 Effective with the release of this solicitation, all communications must be directed only to Procurement Specialist by email at procurement@gcfund.org. Proposers must not communicate with any other personnel of the GCF regarding this RFP.

2.8 This RFP is issued under the GCF Administrative Procurement Guidelines¹. Information regarding to the guideline can be found at http://www.gcfund.org/fileadmin/00_customer/documents/MOB201410-8th/GCF_B.08_31_GCF_Procurement_Guidelines_fin_20141005.pdf

2.9 The Guidelines apply for the interpretation of this procurement process.

3. Request for Clarification of RFP documents

3.1 A prospective proposer requiring any clarification of the solicitation documents may notify the GCF in writing via the GCF email address indicated in the RFP by the specified date and time mentioned in Annex 6. The GCF will respond in writing to any request for clarification of the solicitation documents that it receives by the due date published on Annex 6. Written copies of the GCF response (including an explanation of the query but without identifying the source of inquiry) will be sent to all prospective proposers that have received the solicitation documents.

3.2 If the RFP has been advertised publicly, the results of any clarification exercise (including an explanation of the query but without identifying the source of inquiry) will be posted on the GCF website.

4. Amendments to RFP Documents

4.1 At any time prior to the deadline for submission of proposals, the GCF may, for any reason, whether at its own initiative or in response to a clarification requested by a prospective proposer, modify the RFP documents by amendment. All prospective proposers that have received the RFP documents will be notified in writing of all amendments to the RFP documents. For open competitions, all amendments will also be posted on the GCF website in the opportunities section, procurement.

4.2 In order to allow prospective proposers reasonable time in which to take the amendment into account in preparing their proposals,

5. Language of Proposals

5.1 The proposals prepared by the proposer and all correspondence and documents relating to the proposal exchanged by the proposer and the GCF, shall be written in English. Supporting documents and printed literature furnished by the proposer may be in another language provided they are accompanied by an appropriate translation of all relevant passages in English. In any such case, for interpretation of the proposal, the translation shall prevail. The sole responsibility for translation and the accuracy thereof shall be the responsibility of the proposer.

6. Submission of Proposals

6.1 Proposers shall submit their proposal in hard copy. Technical and Financial proposals must be submitted simultaneously in separately sealed envelopes with the RFP reference and the clear description of the proposal (technical or financial) by the date and time stipulated in Annex VI. The two envelopes must be sealed in an outer envelope with the RFP reference and title.

6.2 Proposals must be sent ONLY to the address detailed below. Proposals sent to other addresses or to individuals will put offerors' proposals at risk of being rejected.

6.3 Submission in hard copy may be done by post, courier or hand delivered. Both inner envelopes should indicate the name and address of the proposer. The first inner envelope should contain the proposer's technical proposal with copies duly marked "original" and "copy". The second inner envelope should include the financial proposal duly identified as such. If the envelopes are not sealed and marked as instructed, the GCF assumes no responsibility for the misplacement or premature opening of the proposals submitted.

Technical proposals shall be submitted in one (1) original envelope, clearly marked as technical proposal with two (2) additional copies as well as (1) soft copy in the form of a CD or USB. Technical proposals (both original and copies) must be sealed in a specially marked envelope/package labelled:

RFP No (RFP/2016/008) – Provision of Portfolio Management Solution for the Green Climate Fund– TECHNICAL PROPOSAL- (name and address of proposer)

Financial proposals should be submitted in one (1) original envelope in the form prescribed herein. Financial proposals should be sealed separately in a specially marked envelope labelled:

DO NOT OPEN- RFP No (RFP/2016/008) – Provision of Portfolio Management Solution for the Green Climate Fund – FINANCIAL PROPOSAL- (name and address of proposer).

Proposers should use recycled paper for all printed and photocopied documents related to the submission of this proposal and fulfilment of this contract and shall, whenever practicable, use both sides of the paper.

Hard copies must be delivered to:

Green Climate Fund,
11th Floor, G-Tower,
175, Art Center-daero
Yeonsu-gu, Incheon 406-840
Republic of Korea

Attention: Procurement Specialist

All prospective proposers are kindly requested to return the completed Acknowledgement Letter of RFP receipt (Annex V) by 25 May 2016, duly signed by an authorized representative advising whether it intends to submit a proposal by the designated closing date/time. Please also notify the Procurement Specialist immediately if any part of this RFP is missing and/or illegible.

7. Late proposals

7.1 Any proposals received by the GCF after the deadline for submission of proposals prescribed in Annex VI of this document, may be rejected.

8. Opening of Technical Proposals

8.1 Proposals will be opened on 8 June 2016 at 3.00pm Korea time in the room designated for this purpose at the premises of the Secretariat. The purpose of this public opening is to record the names of proposers having submitted proposals by the due date and time. Only technical proposals will be opened at the public opening. The financial proposals will not be opened.

9. Opening of Financial Proposals

9.1 After the technical evaluation is completed, the GCF shall notify those Proposers whose Proposals did not meet the minimum qualifying technical score that their Financial Proposals will not be opened. GCF shall simultaneously notify in writing those Proposers that have achieved the minimum qualifying technical score and inform them of the date, time and location for the opening of the Financial Proposals.

9.2 At the opening, the names of the Proposers, and their overall technical scores shall be read aloud. The Financial Proposals shall be then opened, and the total prices read aloud and recorded.

10. Corrupt, Fraudulent, Coercive, Collusive and other Prohibited Practices.

10.1 The GCF requires that all GCF staff, proposers/bidders, suppliers, service providers and any other person or entity involved in GCF-related activities observe the highest standard of ethics during the procurement and execution of all contracts. The GCF may reject any proposal put forward by proposers, or where applicable, terminate their contract, if it is determined that they have engaged in corrupt, fraudulent, coercive, collusive or other prohibited practices.

11. Conflict of Interest

11.1 In their proposal, proposers must (i) confirm that, based on their current best knowledge, there are no real or potential conflicts of interest involved in rendering Services for the GCF, and (ii) set out their policy on dealing with conflicts of interest should these arise.

12. Confidentiality

12.1 Information relating to the evaluation of proposals and recommendations concerning selection of Firms will not be disclosed to Firms that submitted proposals.

Annex I: Statement of Work

1. The Fund is planning to implement a Portfolio Management Solution that will handle end-to-end project lifecycle and portfolio management for public and private sector projects on a secured platform.
2. The solution is required to carry out following functions:
 - a) Intake of Concept Notes and Funding Proposals from Accredited Entities;
 - b) Process Review Workflow and Project Review by GCF staffs, TAP and Board;
 - c) Generation of reports;
 - d) Monitoring, evaluation and control of the projects post-approval (output, outcomes, report and result management framework);
 - e) Disbursement of the funds (for Grants and Concessional loans); and
 - f) Closure of the projects for mainly public sector projects
3. The functional and technical requirements for this RFP are described in Annex I: Statement of Work and Annex VII: main Functionalities.
4. This RFP does not commit the Secretariat to award a contract, nor does it contain a contractual proposal.
5. The selected contractor shall implement a solution that will automate core activities and support business processes. The products and services required by the Fund shall basically include, but not be limited to, the followings:

A. General scope of work

- a. Supply and installation of a Portfolio Management Solution, related software, service subscriptions, and databases;
- b. Implementation services including:
 - Using the set of already shared information and subsequent feedback on key GCF specific regulations, policies, guidelines, procedures and systems overview documents for translating them into intelligent future automated and semi-automated Portfolio Management related business processes.
 - Verifying the appropriateness of 'to be' business process maps in relation to the proposed solution, recommending business process adjustments where justified in the interest of the Fund and modifying/completing the maps accordingly.
 - Modelling and configuring of the solution satisfying requirements of GCF's optimised business processes;
 - Interfacing with essential applications and external data sources that are required for efficient operation of the new solution;
 - Planning and executing necessary tests on the proposed solution for compliance of requirements and specifications;
 - Compliance of audit recommendations, including security and controls; and
 - Performance testing, roll out, stabilization and post go-live support.

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- c. Planning and executing data conversion and migration including archiving of past data; it is assumed that this part will be minimal, considering the start-up situation of GCF;
 - d. Training of users and core team members including developing necessary documentation, user manuals, training material and conducting change management workshops;
 - e. Designing the system architecture, installation and implementation in a Cloud based hosted environment. Work comprises fitting backend performance, storage and network links, including accompanying business continuity concerns.
 - f. Providing warranty services for the solution as a whole.
 - g. 3 years of maintenance coverage for the provided software and services
 - h. On demand by GCF: complementary, separately costed services beyond the basic implementation project. Examples are:
 - Integration/interface development work for future GCF business or partner systems
 - Onsite/remote/blended training for future staff members joining the organisation
 - Updating of customised documentation/training material/eLearning modules

B. Components of the scope of work

The scope of work primarily consists of five elements as follows:

- a. Supply, implementation and installation of a suitable Portfolio Management Solution, database and related software. 3 years of maintenance coverage, following the implementation project.
- b. Advice on installation and commissioning of appropriate PaaS, SaaS, fitting network links, in association with GCF's chosen Cloud service providers.
- c. Setting up of the necessary Cloud infrastructure and application support function with minimum requirements delivering a performance level and availability requirement suitable for GCF.
- d. Implementation services including application installation on development, quality, sandbox and production instances, data conversion as far as required and migration, training and change management, documentation, fitting the solution's specific customer support arrangement and warranty services.
- e. Optional, on-demand service offerings, especially for the time period beyond implementation project closure.

The proposed project plan should cover activities listed above.

Detailed Scope

The scope has been described in detail in the following sections.

- a. Supply, implementation and installation of a suitable a Portfolio Management Solution, database and related software and subscription services (The Tenderers are requested to submit one document on Section A)**

The Contractor will be responsible for the following:

- Responding to the RFP and executing the same if selected, describing the process to be followed for supply and implementation of the software;
- Supply a suitable Portfolio Management Solution product (indicating specific modules, tools etc.) with justification with respect to satisfying the functional and technical requirement specifications laid down in this document; and
- Validate the solution configured and provide quality assurance within the project.

The product proposed by the Contractor must comply with the mandatory criteria and must meet the following:

- It must be of the latest commercially available and acceptable version, at the time of project implementation completion.
- It must have all functions described in business process requirements as natively integrated applications on a single interoperable open platform and not the integration of multiple products and overlapping middleware.
- It must provide wide range of security features such as Authentication, Single Sign-On (SSO) preferably matching with the GCF's current platform environment with Microsoft Active Directory and Azure, authorization, comprehensive log files, and integrated user management.
- Upgrade to new releases should not become mandatory for the next three years from the date of installation.
- It must have product roadmap for the last 3 years and the next 3 years, demonstrating a vendor commitment for continuous investments and enhancements for the specific Portfolio Management Solution.
- It must be upwards scalable in size, capacity and functionality to meet changing business and technical requirements, thereby enabling GCF to be adaptable to change.

The Tenderers will be required to provide detailed documentation on the following in their technical response:

- The Portfolio Management Solution, required customization if any (although not desired), tools, database, network performance and the related software being supplied in order to meet the functional and technical requirements set out in this document;
- The process to be followed in installation and configuration of the Portfolio Management Solution, tools, database and the related software; and
- The process to be followed for maintenance and upgrade of the Portfolio Management Solution, applying patches, tools, database and the related software.

b. Advice on, installation and commissioning of appropriate PaaS, SaaS and network links, in association with GCF's respective Cloud service providers (The Tenderers are requested to submit one document on Section B and C)

- Tenderer shall specify the Cloud services configuration/specifications that are most suitable for running the solution provided to GCF comprising of (but not limited to) the operating systems, load balancing (at application level) and administration tools,

bandwidth requirements, firewalls and any other item required for the proposed solution considering GCF's modern building and network infrastructure, server less environment with all core current and future applications running on virtual machines in an external Cloud environment.

- Contractor will be responsible for properly drawing up all PaaS, SaaS and networking link specifications to ensure that the installation and deployment of the procured solution is smooth across GCF.

Specific activities that need to be done in this task are:

- Draw up detailed PaaS, SaaS and external networking specifications pertaining to the solution being implemented;
- Provide the bandwidth requirements of applications, clarify if there should be a need for dedicated quotas;
- Additional PaaS and SaaS subscriptions required will be procured by GCF. Bidder is required to configure and integrate any of those changes;
- Assist GCF in the procurement of the specified Cloud services;
- Assist GCF in carrying out a quality check of the procured new/extended Cloud services and connectivity arrangements;
- Fine-tune and optimize the Cloud based services and connectivity arrangements during implementation period;
- The chosen PaaS and SaaS should be performance scalable to meet changing business and technical requirements;
- Ensuring that the operating system and software plug-ins are of the latest release commercially available. Tenderers should mention the operating system/s and software plug-ins supplied along with version and release date.
- The Tenderer will also be required to provide detailed documentation on:
 - The software and services to be supplied;
 - The process to be followed in installation of the software;
 - The process to be followed in maintenance and upgrade of the PaaS, SaaS and related software; and
 - Processes suggested for performance measurement during the period of performance guarantee.
- The Tenderer shall be responsible for PaaS sizing, to be done considering appropriate capacity and scalability assumptions, along with justifications.
- The Tenderer shall study and prepare a schedule and road map to comply with the specified overall project time schedule and project scope.

c. Cloud infrastructure and application support team set up (The Tenderers are requested to submit one document on Section B and C)

Installation and commissioning of any software and Cloud based services will be the responsibility of the Contractor.

The tasks include, but are not limited to the following:

- Review sizing and detailed specifications of external network bandwidth required for smooth and effective running of the Portfolio Management Solution;
- Provide the bandwidth requirements of applications in comparison to current GCF infrastructure;
- The Contractor shall be entirely responsible for setting up the fitting PaaS and SaaS environment to meet the requirements of the solution implemented at GCF;
- The Tenderer shall study and prepare a schedule to comply with the specified overall project time schedule and project scope, and
- The Tenderer should also provide details of the application support team requirements with detailed team structure, skills requirements and any other information necessary to enable GCF to evaluate the ongoing cost and skill requirements to support the proposed solution. The description should at least describe two scenarios, one with maximised reliance on vendor/third party for providing system support and enhancement services in the future. A second scenario should describe the typical/best practise size and nature of customer side. Please elaborate on job categories of more strategic nature that are recommended to be created internally (business intelligence etc).
- Provide a formula that allows the GCF to estimate its future annual steady state TCO for your suggested solution.

d. Implementation services (The Tenderers are required to submit a document on the points below)

The Contractor will be responsible for the following:

- I. Design and implementation of system architecture;
- II. Project management, planning and scheduling various phases of the implementation;
- III. Verify and ensure the completeness of business process descriptions and their mapping against the capabilities of the Portfolio Management Solution;
- IV. Conceptualizing, configuring, developing, customizing, validating and implementing the solution, including developing and testing interfaces, custom applications, data conversion were required, training and change management, documentation etc.;
- V. Providing post go-live support.

Each of the tasks is described in detail below. Some of these are also explained in detail further in this section.

I. Design and implementation of system architecture

The Contractor shall be entirely responsible for the architecture of the system implemented to satisfy all features, functions and performance as described in this document. System architecture description provided in this document is for guidance only. Tenderer should validate the description as necessary in order to provide a complete solution.

The System architecture shall be developed with the following guidelines in mind:

General Guidelines

- The system architecture should be based on open and prevailing industry standards and protocols.
- The system will be Cloud based, centrally deployed and accessed.
- Role based access shall be planned to ensure high granularity without compromising on security needs of the application.
- The system shall be designed to be scalable and extensible.

Application

- The application design should be a services based architecture for all environments.
- All application components should have a browser based user interface with a common look and feel.
- All production applications must have high availability.
- All systems must take into account appropriate security, performance, efficiency and maintainability issues.
- Employee Self Service (ESS)

Data

- Data will be owned, shared, controlled and protected as a corporate asset.
- Shared data will have consistent formats and definitions and be independent of applications.
- Data should only be accessed through application/interfaces to create, update and delete.

Infrastructure

- The architecture should be designed for extensibility and scalability.
- The system must be designed in such a way that it supports all the future enhancements, load balancing of the application, presentation and data layers of the system.

Information Security Policy

- The GCF will due to the nature of its business strive towards ISO 27001 certification. Tenderer should therefore prepare matching Portfolio Management Solution information security policies and procedures in line with the requirements of that standard. The Contractor will have to incorporate these needs into the platform, links, application and operations design as appropriate. The information security provisioning may be audited either by GCF or an external auditor authorized by GCF.
- Define policies regarding the archiving, retention and destruction of records in consultation with GCF. Customize the procedures for these activities as automatic activity or as alerts/reminders etc.

- Define Policies for backup and recovery.

II. Project management, planning and scheduling

Project Team

- The Contractor will form a full-time team for the project consisting of Project Director, Project Manager, Functional Leaders and other team members. The key team members should be professionally qualified / trained in their tasks and should have requisite Portfolio Management Solution implementation experience. Swapping of resources during the project will not be permitted without prior approval by GCF.
- The Tenderer should specify the expected involvement of GCF employees within the project team structure. The Tenderer should further on describe the recommended composition and terms of reference of Project Steering Committee.
- The Contractor will be expected to follow Project Management principles (according ideally PMI PMBOK or alternatively PRINCE2) and good practices, including Risk Management, Quality Assurance, Resources Management and Reporting.
- The Tenderer project plan will adequately account for User Acceptance testing, documentation related to Controls, Security, Segregation of Duties; and the activities will adequately account for implementation of controls identified in our business processes.

Implementation Plan

The date of award of contract to the Contractor will be considered as start date of implementation.

- The Tenderer should propose a suitable project plan in such a manner that overall timelines, as specified in this document, are adhered to. The Tenderer should provide detailed time schedule for all items as per total scope of work matching with the implementation plan.
- The Tenderer will further detail the project plan in early stages of the project and get the same validated by GCF. The project plan should include the following at the minimum:

The project broken up into logical phases and sub-phases;

- Activities making up the sub-phases and phases;
- Key milestones and deliverables along with their dates;
- Start date and end date for each activity;
- The dependencies among activities;
- Resources / Consultants to be assigned to each activity;
- Resources (core team, business team and process owners) expected from GCF for each activity.

In addition to the implementation plan, the Tenderer should formulate and submit other key documents including, but not limited to, the following:

- The Interface Strategy describing high-level interface points between Portfolio Management Solution, Financial Management System applications and Accounting system;

- Data Conversion Strategy describing the data elements that would need to be converted and the process to be followed for the same;
- Solution Design Strategy including the number of iterations of CRP (Conference Room Pilot), UT (Unit Test), SIT (System Integration Test) and UAT (User Acceptance Test) expected, all test documents to be submitted to GCF for prior approval;
- Risk Management Strategy, identifying, analysing and evaluating the project risks and the process to be followed in mitigating those risks;
- Training Strategy, describing and implementing proposed approach in providing training to various categories of users;
- Change Management strategy; and
- Post implementation support strategy.
- In addition to the strategy level documentation above, implementation related documentation is expected. All documentation will be in English and subject to review and acceptance by GCF. It is expected that documentation will capture an adequate level of detail and will be presented professionally to GCF.

Project Reporting

- The Tenderer should describe the proposed project reporting methodology. As a minimum, a progress report to GCF is expected each fortnight. The frequency may be increased during critical phases of the project. Additionally, the Contractor shall report on a continuous basis, project risks, mitigation, exceptions and issues that require immediate attention of GCF.
- The GCF will nominate an internal focal point, to ensure seamless coordination between the parties.
- The Contractor will via its Project Director be responsible for attending meetings of the Project Steering Committee, informing the membership about progress and status, discussing potential options ahead, and seeking clearance for potential change requests.

Other Requirements

The Contractor should also meet following expectations:

- The Contractor should carry out the implementation based on a well-defined proven methodology (including pre-defined formats) through all stages of the project. However, the Contractor will not restrict itself to this methodology and would be open to improvisation as may be necessary;
- The Contractor should observe formats and procedures prescribed for documentation during all stages of project execution;
- The Contractor should deploy adequate resources for the required duration on site at GCF as well as any other site / unit / location as may be necessary during any stage of the project;
- The Contractor should preferably be accessible during the GCF working hours, and be capable to provide a wide range of assistance services remotely via the Internet, in that way minimising the dependence on onsite work for routine or exception settings. A support strategy would need to be provided.

- All the key team members (including Project Manager/Director) of the Contractor should be permanent staff of the Contractor, with demonstrable experience in the solution proposed. As mentioned earlier, substitutions and changes to the team will not be permitted during the project. In case of extreme circumstances, GCF reserves the right to evaluate and authorize substitutions, and/or request for substitutions.
- The Contractor should obtain and produce a certificate from proposed Portfolio Management Solution Product Supplier mentioning that the Solution is fit for go-live.
- The Contractor should obtain and produce a certificate from Portfolio Management Solution Product Supplier for appropriate PaaS and SaaS sizing.

III. Business Process Evaluation

GCF has already prepared copies of the Board Documents and other documents that will be the basis for elaborating Portfolio Management Solution assisted future business processes. Find those in Annex IX (Regulations, Rules & Policies). The Contractor is encouraged to study the Fund's public facing web site with official GCF Board documents for complementary details.

- The Tenderer is responsible for studying the upfront provided reference material for estimating the effort of interactively designing the Portfolio Management Solution related to-be business processes. The Tenderer is expected to list and very briefly explain all the essential business processes that are suggested to be covered during the assignment work and would allow the Fund to fulfil its mandate.

The GCF will validate this list and suggest suitable changes as may be necessary. Based on the agreed business process coverage of the implementation, the Contractor will:

- Conduct an in detail study of the business process requirements specified by GCF;
- Identify the workaround solutions or customizations and interfaces to be developed as part of the implementation;
- Identify information requirements for each business process;
- Identify data conversion elements for each business process; and
- Identify data migration requirements for each business process.
- The Tenderer should clearly understand GCF integration requirements (functional as well as technical). The implementation cost that will be submitted by the Tenderer should include effective integration of these applications as proposed and no extra payments will be made towards integrations of applications.
- The Tenderer proposal should clearly state where GCF business process requirements can be met 'out of the box' by the Portfolio Management Solution solution and the extent of any customization required if this is not possible. The proposal should be a lump sum Fixed Price Cost and not a Time & Material.

IV. Modelling, developing, configuring and testing the solution

The Contractor will also be responsible for the following:

- Modelling, developing and customizing the solution based on the business processes, proposed improvements and satisfying the business and reporting requirements of GCF;
- Configuring the solution including development of necessary interfaces with external data sources and basic platform applications;
- Ensuring that the necessary controls and security are configured in line with GCF policies, and controls are acceptably automated to the extent possible.
- Conducting Unit Tests, System Integration Tests, User Acceptance Tests, Stress Tests and such other tests and making necessary changes to configuration / setup based on the test results, implementation of pre-go live audit recommendations etc.;
- Training and change management;
- Data conversion and migration; and
- Go-live and cutover activities.

V. Providing post go-live support

- The Contractor will provide post implementation support for six months from the go-live of all implemented modules from final go live date.
- The Contractor will provide guidelines in setting up and managing Portfolio Management Solution customer support regime (to be operational ahead of the go live date) including the processes to be followed in logging request for assistance, assigning requests to specific individuals, escalating calls to technical, business or vendor actors, recording resolution and tracking overall time frame from logging a call to its resolution.
- The Contractor will provide a meaningful Portfolio Management Solution Service Level Agreement that helps in managing expectations and roles between users and internal/external Portfolio Management Solution service providers.
- In addition to the above mentioned post go live support, the Contractor may be requested by GCF to provide additional support for problem resolution, enhancements etc.
- The Contractor will provide a description of its team for the post-implementation support along with their roles, job descriptions and profiles of key individuals. If such additional support is expected to be charged separately, then the Contractor will propose time and material rates for this as mentioned in the price bid separately.
- The Contractor shall co-operate with GCF in the conduct of any post implementation audit (by a party other than the Contractor), if so desired to be conducted by GCF, during the period of post go-live support. The Contractor shall also be responsible for implementing the audit recommendations without any additional charge. Also, in the event of GCF conducting an independent pre go-live audit, the Contractor shall render all necessary support for the audit, including implementing the changes/improvements if any recommended, free of additional charges whatsoever.

6. Functional scope

The new system should be a centralized, Cloud based Portfolio Management Solution maintaining all the data under a single database.

Main functionalities of Portfolio Management Solution

Main functionalities of Portfolio Management Solution is outlined in Annex VII of this RFP document.

7. Technical scope

The features that characterize the system shall include, but not be limited to the following:

a. User Interface

- The end user interfaces could be web interface or Graphic User Interface (GUI) based. **The Tenderer should account for access from remote locations with weak internet connections.**
- The majority of Portfolio Management Solution user interactions should as well be feasible via tablet size devices. Regular Portfolio Management Solution interactions for normal staff members should further on be possible from modern smartphone devices – Android, iPhone and Windows Phone.
- Wherever possible, data should be available for entry from a drop-down list. There should be field level validation of the data being entered. In case of an error in data type, the error message should be customized to GCF specification. It should be possible for the system administrator to restrict certain values for entry to specific users. It should also be possible for the users to retrieve data entered incorrectly and change the same subject to defined security procedure.

b. Single Point Data Entry

- The system should be capable of reusing the data once captured in the computer, so as to ensure integrity of data. The system should be able to automatically capture data from other retained legacy/process control systems through integration. There should be a single set of data which once created should be available for use by all users, thereby eliminating the need for multiple data entry and ensuring data consistency across the system. This applies not only to the transaction level data but also to all master data, which may be shared across functions.

c. Centralized / Common Master Data

- The solution envisaged by GCF assumes a centralized master data repository to be shared by all the units based on their requirements.

- Centralized/Common master data repository means that there would be only one set of master data across the organization capable of maintenance from any or all units with centralized approval system.
- The master will have data common to all units as well as data specific to a unit. While managing data, the system must provide adequate control and security for addition, modification, deletion and validity. The values will be assigned to individual units based on their requirements.

d. Data Access and Security

- GCF is aware that ensuring information security in a Portfolio Management Solution environment is critical for the Fund's stakeholders. The system must have proper security and maintenance facility which limit access to the system and its various functions to the users delegated with appropriate authority. It shall provide logging, both by user and by terminal. Access to the data shall be on role based principles. The system shall record user identity, date and time stamp of all transaction with details of creation, read, update, delete or print.
- Access should be restricted at different levels of data file, program, module, screen, record, field database table, row or column. An ISO 27001 compliant set of Portfolio Management Solution specific information security regulations shall be given by the Tenderer to safeguard information against unauthorized use, disclosure or modification, damage or loss.

e. Audit Trail

- The Tenderer must ensure that the Portfolio Management Solution proposed by them has extensive facility with respect to maintaining audit trail. The system shall be able to define audit trails, audit logs and transaction logging requirements. It shall enable audit trails on-line, tailor audit requirements by modules.
- Any addition, deletion or modification to an existing record, whether master or transaction, must bear the date and time stamp, the name of the log-in user who made the change and the terminal from which the change was made. It should also be possible to maintain details of the original record and subsequent changes to the record. Standard audit related reports should also be available.

f. Online Help Facility

- The system should also provide context based online help capability for every form /process in the proposed solution. This on-line help text / facility should be customizable to make it GCF processes specific. The Tenderer must indicate how it proposes to make the online help tailored to GCF requirement.

g. Modularity

- GCF expects the proposed Portfolio Management Solution to be modular in nature. The system will initially be required to cover a range of business processes across various functional areas / modules as mentioned above, but it should also allow addition of more functional modules as and when required, which should seamlessly integrate into the core system without encountering any technical issues. Integration between such new modules and the modules already implemented should be seamless and should not require significant development effort.
- GCF expects as well that the Portfolio Management Solution will be capable of still operating meaningfully if seeing one/some of its modules in the future replaced via potential best-of-breed alternatives.

h. Scalability

- The Portfolio Management Solution being proposed by the Tenderer must be scalable both in terms of the business rules, volume of transaction and master data but also in terms of defining new entities and organization structure.

i. 24/7 Operations

- The Tenderer must ensure that Portfolio Management Solution is supported 24/7 operations. This is necessary as GCF will work with implementation partners and stakeholders across all time zones worldwide.

j. Reports

- It is expected that all the out-of-the-box reports will be reformatted as per GCF's requirements and fields could be replaced/removed if required.
- It is expected that custom reports may need to be developed if the standard reports available in the Portfolio Management Solution Product do not meet GCF specific requirements. These reports would include those, which would extract and present information already in the database in a specified format or could require some intelligence/calculations built into it.
- The Tenderer shall explain how the Fund's need for agility and flexibility to respond to changes of information needs by stakeholders can be dealt with, while avoidable bottleneck effects and/or costly case by case development work. A brief description of the methodology variations at disposal when developing custom applications/reports should be included in the response to the RFP.
- In addition, the Contractor is required to train GCF Core/ Technical Team members on the methodology of building custom reports, so that GCF can take up the additional development as and when required.

k. Data Cleansing, Conversion, Mapping, Migration and Validation

- Due to its start-up nature the GCF expects minimum data migration activities to be required as part of the Portfolio Management Solution introduction work.
- The Contractor is expected to prepare and submit a Data Conversion Strategy Document during the initial study stage of the project describing the broad data elements to be manually entered or when justified in an automated fashion converted, source of the same, the target Portfolio Management Solution module and the detailed form in which the same will be converted. A tentative timeframe for developing the potentially necessary scripts, testing the same and eventual execution on the Production environment should also be indicated.
- The Contractor shall:
 - Identify data elements (Master and Transactional) to be migrated;
 - Ensure collection of all data required from identified sources with GCF assistance;
 - Support GCF in providing assistance in cleansing, enriching and formatting of pre-existing data categories;
 - Prepare and validate data mapping structure;
 - Prepare data migration scripts where adequate due to volume;
 - Run successful trial data migration;
 - Upload data to the new test and production system upon acceptance by the data owners;
 - Reconcile and validate migrated data and status of transactional data; and
 - Create new/additional data mandatory in the new system.

l. Training Scope

- GCF believes that the key to successful Portfolio Management Solution implementation will be the Contractor's ability to train GCFs staff in operating the proposed business solutions. In this context, the Contractor is expected to:
 - Provide a description of the approach and tentative plan for training GCFs core team members and end users along with the tentative time frame;
 - Include the training budget in the proposal;
 - Provide a description of the training hand-outs and/or operating manuals to be provided to the core team members and the end users;
 - Provide a description of the assistance in setting up a Portfolio Management Solution customer support prior to go-live.
- Training programs will have to be organized for separate categories of users based on functions, roles, responsibilities and geographic locations. The Contractor will be responsible for the preparation of the training material and end user manuals. End user manuals should cover "how to use" concepts for all Portfolio Management Solution modules to be implemented.

m. Change Management Workshops

In addition to the above, the Contractor will create a change management approach and work stream to identify issues anticipated in the change management process and proposed solutions to overcome these. The Contractor is expected to conduct the change management programs on one-on-one individual basis or in groups and at different locations.

The goal of change management in the context of GCF would be:

- Collaborative working - shared sense of purpose and ownership;
- Technology adoption as a means of efficient service delivery; operations of submissions and approvals in workflow environment;
- Adoption of Business Intelligence tools for analysis and supporting decision making;
- To create a knowledge sharing culture in the organization;
- Self-initiated view of learning and readiness to learn from each other;
- Overall climate of trust and involvement;
- Partnering mind-sets and capabilities.

Change Management will be a key milestone in the project and will be subject to acceptance.

Annex II: Technical Proposal

1. The Technical Proposal must be sealed in its own envelope clearly marked as Technical Proposal. **No details of a financial nature whatsoever must be included in this Technical Proposal.** Failure to comply with this requirement will result in the disqualification. Each page of the Technical Proposal shall be signed and stamped at the bottom by an authorized representative of the company.
2. Proposers are requested to submit a Technical Proposal that demonstrates the capability in delivering requested services as indicated in Annex III.
3. To facilitate a faster evaluation and comparative analysis of the proposals, we recommend that the proposals be structured in the following manner:
 - a. **Expertise of Firm/Organization** – This section should provide details regarding management structure of the organization, organizational capability/resources, and experience of organization/firm, the list of projects/contracts (both completed and on-going, both domestic and international) which are related or similar in nature to the requirements of the RFP.
 - b. **Proposed Methodology, Approach and Implementation Plan** – This section should demonstrate the Proposer’s response to the Terms of Reference/scope of services by identifying the specific components proposed, how the requirements shall be addressed, as specified, point by point; providing a detailed description of the essential performance characteristics proposed; identifying the works/portions of the work that will be subcontracted; and demonstrating how the proposed methodology meets or exceeds the specifications, while ensuring appropriateness of the approach to the local conditions and the rest of the project operating environment.
 - c. **Management Structure and Key Personnel** – This section should include the comprehensive curriculum vitae (CVs) of key personnel that will be assigned to support the implementation of the proposed methodology, clearly defining the roles and responsibilities vis-à-vis the proposed methodology. CVs should establish competence and demonstrate qualifications in areas relevant to the TOR.

In complying with this section, the Proposer assures and confirms to GCF that the personnel being nominated are available for the Contract on the dates proposed. If any of the key personnel later becomes unavailable, except for unavoidable reasons such as death or medical incapacity, GCF reserves the right to render the proposal non-responsive. Any substitution of personnel arising from unavoidable reasons shall be made only with the approval of GCF.
 - d. **Other Information as may be relevant to the Proposal** - The Technical Proposal shall not include any financial information. A Technical Proposal containing any form of financial information that could lead to the determination of the price offer may be declared non-compliant.

Annex III: Financial Proposal

Pricing Information

1. The Financial Proposal should include pricing information covering requests stated in the previous annexes.
2. This Financial Proposal must be sealed in its own envelope clearly marked as Financial Proposal. NO details of a financial nature whatsoever must be included in the Technical Proposal (Annex IV). Failure to comply with this requirement will result in disqualification. Each page of this Financial Proposal shall fully completed, signed and stamped at the bottom by an authorized representative of the company.
3. The financial component shall include the following:
 - a. Fee structure and pricing details in US dollars including all expenses and applicable taxes;
 - b. Financial methodology that explains the rationale of the financial component and how it offers best value;
 - c. Potential economies of scale due to linkages with existing operations of the Tenderer;
 - d. Financial plan that clearly links all costs to activities and outputs detailed in the work plan with associated payment mechanisms;
 - e. Unit rates
 - f. Total Lump sum Contract amount

Financial proposals that will not have the above details will be disqualified.

4. Tenderer may be subject to local taxes (such as value added or sales tax, social charges or income taxes on non-resident Foreign Personnel, duties, fees, levies) under the contract. Tenderer shall include and clearly show all expected taxes in the financial component.
5. The Fund reserves the right to give preference to the most appropriate baseline in terms of expected economies of scale for the Fund.
6. The financial proposal shall be fixed price and not based on Time & Material. It should contain real efforts in terms of man days (i.e. Junior, Intermediate, Senior and etc.) and price per man day for each category. Based on the Technical proposal (Workplan, methodology, personnel, goods and services to be supplied under the contract and the unit rates, the bidder must provide a total lump sum fixed price for determining the financial score and contract value. The financial proposal should provide financial total contract price as well.

Annex IV: Company Profile Form

Please respond to all questions.

Company details - vendor's name:

Name:

General Information

Primary Contact	
Address	
Postal Code	
Country	
Telephone	
Fax	
Email	
Website	
Parent company, if any	
Subsidiaries, Associates and/or Overseas Rep(s), if any	
Year established	
Type of organization	Public Enterprise () Private Company () Organization sponsored (assisted by Government () Other (please specify) ()
Type of Business	Financial Intermediary () Consulting Company () Other (please specify) ()
Summary of main business activities	
No. of employees (by location)	
Staff turnover rate	
In-house working language(s)	
Bank Name Bank Address Account Holder Account Number IBAN SWIFT	

Prior experience with international organizations

*List contracts undertaken in the last three years with a similar scope.
BRIEFLY list recent clients for whom you produced similar deliverables as well as values:
Attach additional sheets if necessary.*

- | |
|---|
| 1 |
| 2 |
| 3 |
| 4 |

Environmental Policy

Does your company have a written statement of its environmental policy?

YES () Please attach copy in English

NO ()

Contract disputes

List any disputes your company has been involved in over the last three years

References

*List suitable reference projects and contacts.
What options would there be for a site visit to a reference project and/or the vendor's site?*

- | |
|---|
| 1 |
| 2 |
| 3 |

Partners

*If this is a part bid, list relevant recent experience of working with partners.
Are there already formal or informal preferred partnership agreements in place?*

- | |
|---|
| 1 |
| 2 |
| 3 |

Conflict of Interest

Are there any likely circumstances or contracts in place that may introduce a conflict of interest with the parties to this contract? If so, explain how this will be mitigated

- | |
|---|
| 1 |
| 2 |

Certification

I, the undersigned, confirm that the information provided in this annex is correct. In the event of changes, details will be provided.

Name: _____

Title: _____

Signature: _____

Date: _____

Annex V: Acknowledgement Letter

Dear Sir/Madam,

We, the undersigned, acknowledge receipt of your Request for Proposal (RFP) No. 2016/008 dated 18 May, 2016 and hereby confirm that we:

INTEND DO NOT INTEND

to submit a proposal to the secretariat of the Green Climate Fund (GCF) by the deadline date of **8 June 2016**.

We acknowledge that this RFP is confidential and proprietary to the secretariat, and contains privileged information. Upon request, we will return this RFP or any part thereof, and all copies thereof, to the secretariat.

Name of Authorized Representative: _____

Signature: _____

Title: _____

Name and Address of Vendor: _____

Telephone: _____

Facsimile: _____

If you do not intend to submit a proposal to the secretariat, please indicate the reason:

We do not have the capacity to submit a proposal at this time.

We cannot meet the requirements for this RFP.

We do not think we can make a competitive offer at this time.

Other (please specify): _____

Kindly return this acknowledgement letter immediately via e-mail to procurement@gcfund.org

NOTE: Due to current security arrangements, your authorized representative must present a completed copy of this letter in order to observe the public opening procedure.

Annex VI: Timeline

1. The Green Climate Fund will follow the timeline below for this RFP. Any changes to this timeline will be posted on the GCF website. Please note that the target dates and may be adjusted.

	Event	Responsible Party	Date (and time, KST*)
1	Posting of RFP	GCF	18 May 2016; 19.00
2	Return of Acknowledgement Letter	Tenderer	25 May 2016
3	Last date for requests for clarification of the RFP	Tenderer	30 May 2016
4	Last date to reply to questions received/ Last date for amendment	GCF	1 June 2016
5	Last date for submission of proposal	Tenderer	8 June 2016; 15.00
6	Notice of successful provider	GCF	22 June 2016
7	Contract signing	GCF/Tenderer	29 June 2016
8	Work start	Tenderer	As specified in the contract.

*KST: Korean Standard Time (Seoul Time)

Annex VII: Evaluation Criteria

A. Evaluation and Comparison of Proposals

1. The proposals will be evaluated in a staged procedure, with evaluation of the technical proposal being completed prior to any financial proposal being opened and evaluated. The financial proposal will be considered only for submissions that fulfil the minimum technical requirements.

B. Acceptance of Submissions

2. All proposers are expected to adhere to the requirements for submitting a proposal. Any proposals that fail to comply will be disqualified from further consideration as part of this evaluation. In particular:
 - Full compliance with the formal requirements for submitting a proposal;
 - Submission of all requested documentation
3. The Technical Proposal shall include information to demonstrate the current soundness and financial position of the submitting organization:
 - Organizational: a brief description, including ownership details, date and place of incorporation of the firm, objectives of the firm, partnerships, qualifications and certificates, etc.
 - Statement of Satisfactory Performance of similar services from the firm's Top 3 (three) Clients in terms of Contract Value the past 3 (three) years. Contact details of the mentioned clients must be provided.
 - Environmental responsibility in place. To show this a copy of environmental policy will be attached to the proposal.
 - Listing of proposed personnel, experience and qualifications
 - Comments on the TOR and how the firm will address the requirement
 - Methodology and approach

C. Evaluation of Technical Proposal

4. A reviewing committee shall be established to evaluate each technical proposal. The committee will comprise of evaluation and technical specialists. The technical proposal is evaluated individually on the basis of its responsiveness to the technical requirements and will be assessed and scored according to the evaluation criteria as stated in Annex XI – Evaluation Criteria Form. The proposers are also requested to complete the excel file as part of their submission.

Technical proposals that score at least 75 points out of 100 will be considered as qualified for the review of financial proposal. Any proposal less than that will be disqualified from proceeding to the next step and its financial proposal shall be returned unopened following the award of the contract.

D. Evaluation of Financial Proposal

5. The financial proposal of all offerors, which have attained the minimum score in the technical evaluation, will be evaluated subsequently.

The lowest evaluated Financial Proposal (Fm) is given the maximum financial score (Sf) of 100. The formula for determining the financial scores (Sf) of all other Proposals is calculated as following:

$Sf = 100 \times Fm / F$, in which "Sf" is the financial score, "Fm" is the lowest price, and "F" is the price of the proposal under consideration.

The Financial Proposal will account for 30% (weight of 0.30) of the evaluation score.

E. Consolidated evaluation

The weights given to the Technical (T) and Financial (P) Proposals are:

T = 0.70, and P = 0.30

Proposals will be ranked according to their combined technical (St) and financial (Sf) scores using the weights (T = the weight given to the Technical Proposal; P = the weight given to the Financial Proposal; T + P = 1) as following:

$S = St \times T\% + Sf \times P\%$.

The total score of 100 points will consist of 70 points weighted from technical evaluation and 30 weighted points from financial evaluation. The firm (s) achieving the highest combined technical and financial score will be invited for contract negotiations.

F. Award

The Award will be made to the responsive proposer which achieves the highest combined technical and financial score, following negotiation of an acceptable contract. GCF reserves the right to conduct negotiations with the Proposer regarding the contents of their offer. The award will be in effect only after acceptance by the selected proposer of the terms and conditions and the technical requirements.

Annex VIII: Main Functionalities

1. Instructions

1.1 Completion of this document

Please complete each part of this Annex VII (unless otherwise indicated) or provide a brief explanation where this is not possible using the space available. The vendors are asked to respond by addressing the following:

Does your proposed solution meet the requirements as stated?

If the solution fully meets the requirement, please answer “Yes” under Fully Available column. If the solution meets the requirement partially, please indicate percentage of the requirement under Partial (%) column and address the difference percentage under Gap (%) column. If the solution does not meet the requirement at all, please answer “Yes” under N/A column.

If the answer is “Partly” in the Partial (%) and Gap (%) column, please address the impact of the gap under Gap Impact column and the mechanisms or functionalities which will be used to address the gap under Gap Addressing Mechanism column. The vendors are also welcome to make suggestions or comments in the comment/Observation column.

2. General process summary

2.1 General Requirements

The solution will handle Portfolio Management lifecycle for both public sector projects and private sector projects: i) Concept Note/Funding Proposal intake from Accredited Entities; ii) process project review (GCF staffs, TAP, Board, funded activity agreement); iii) generation of reports; iv) monitoring & evaluation and control the projects post-approval.

The solution could also handle disbursement of the funds (For Grants and Concessional Loans) and completion of the projects for mainly public sector projects, this would still need to be discussed and agreed with the stakeholders.

The solution shall provide a clear and standard portal to Accredited Entities and External Reviewers to manage the Workflow of submission and Board approval. Such Portal could be also customized/used by Board Members.

The solution could also handle disbursement of the funds and completion of the projects for public sector projects.

The GCF is not using the concept of defined programme and budget at the moment. The GCF is currently receiving voluntary project funding requests and we are approving them based on a set of goals and criteria.



2.1.1 Concept Notes & Funding Proposals

Concept Notes can be filled out by Accredited Entities (AE) if the projects are at initial stage and is being developed. The Concept Note template contains limited information about the project and it is optional requirement for AE.

Funding Proposal templates requires AE to provide detailed information about the projects. As the project development matures, the projects at concept note stage can be evolved into Funding Proposals.

ID	Concept Note & Funding Proposals Requirements			Vendor						
	Short Name	Description	Priority	Fully Available	Partial (%)	N/A	Gap (%)	Gap Impact	Gap Addressing Mechanism	Comment/Observation
0001	GCF Template Customization	Customization of GCF templates (Concept Notes, Funding Proposals and Review Template)	High							
0002	Form Modification	Ease of form modifications -Vendor needs to specify whether the form modification needs to be done by them or it can be modified by GCF	High							
0003	Data Transfer between stages	Data transfer between different stages: CN to FP	High							

2.1.2 Intake Process (CN and FP)

The Fund currently receives Concept Notes and Funding Proposals in a word template through official outlook account. Accredited Entities (AE) also send supplement documents (financial analysis, due diligence reports, No-Objection letters from NDAs, annexes and etc.) in word, excel and pdf files.

ID	Concept Note & Funding Proposals Requirements			Vendor						
	Short Name	Description	Priority	Fully Available	Partial (%)	N/A	Gap (%)	Gap Impact	Gap Addressing Mechanism	Comment/Observation
0004	Eligibility Questions for AE	Before AE submits CN/FP, they should be asked eligibility questions	High							
0005	Form Intake	Intake of CN and/or FP	High							
0006	Form Save and return	AE to save Concept Notes and Funding Proposals as Draft and return whenever to finish	High							
0007	Mandatory Fields	Some fields must be marked as mandatory	High							
0008	Submission/Resubmission	AE to submit/resubmit CN/FP. Once resubmitted, both AE and Reviewers should be able to see the changes that have been made and different versions of the document	High							
0009	Endorsement	Endorsement of the application by AE's officer in charge	High							
0010	Supplement Documents	AE to upload supplement documents (word, excel, pdf and etc.)	High							
0011	Rich Text fields/HTML	Allow AE to copy/paste pictures/charts/tables within the fields (HTML or rich text)	High							
0012	Text fields	Include drop-downs, checkboxes and text fields in application	High							
0013	Spelling check	Provides spell-check	High							
0014	Form ID	Concept Notes/ Funding Proposals are given own unique ID for database	High							

0015	Online Help	Online help function and User Guide to assist AE to fill out Concept Notes and Funding Proposals. It would be ideal to have a small question mark under each field and the detailed description of the field pop-up once the AE puts a mouse on the question mark icon.	Low							
0016	Form Builder	Complex form builder (business logic included in the form) should be available. This includes application form, checklist, approval forms and etc.)	High							
0017	Providing Countries/AE information	Single proposal with multiple countries/accredited entities	High							
0018	Dependency on other projects	Funding proposal could be relevant to one single project or several sub-projects.	High							
0019	Use of different financial instruments	Funding proposal could have multiple financial instruments (grant, loan, equity, guarantee and debt)	High							
0020	Discard application	AE can discard an application not yet submitted so that they can restart an application from scratch	High							
0021	User Defined Field	User defined fields and additional custom fields are required	High							
0022	Word Count	Word count function for each field	Low							

2.1.3 Portal/Dashboards

The minimum information to be displayed can be found in Annex I.

ID	Concept Note & Funding Proposals Requirements			Vendor						
	Short Name	Description	Priority	Fully Available	Partial (%)	N/A	Gap (%)	Gap Impact	Gap Addressing Mechanism	Comment/Observation
0023	Dashboard for AE	AEs should be able to see lists of Concept Notes and Funding Proposals when they log in – this includes submitted and work in progress Concept Notes and Funding Proposals	High							
0024	Information Document Folder	Information Document Folder should contain board decisions or any other documents AE should be aware. The solution should have an acknowledgement check box for AE to click if they have read the documents or not. For any newly updated documents, the alert message should notify AE to read the documents and AE should click acknowledgement check box.	High							
0025	Dashboard for CPD	Country Programming Division (Readiness team/Accreditation team) should be able to see not only summarized chart/graphs but also a table showing list of CN/FP with its entailed specific information by Country/AEs (for internal use) And in case they want to share it with NDAs/Focal Points, they should be able to export the table and charts/graphs (ONLY for selected parts) in PDF format. (if the exported info can be linked to Country page in intranet of GCF, it would be the best option)	TBA							

0026	Dashboard for Reviewers (Internal Reviewer)	The Reviewers should be able to see list of submitted Concept Notes and Funding Proposals when they log-in. They Dashboard should be different for different reviewers	High							
0027	Dashboard for Administrator (Internal Reviewer)	Administrator should be able to see all submitted Concept Notes and Funding Proposals	High							
0028	Dashboard for Task Lead (Internal Reviewer)	Task Lead should be able to see all submitted Concept Notes and Funding Proposals	High							
0029	Dashboard for Pipeline Managing Officer (Internal Reviewer)	The officer in charge of Pipeline for each division should be able to see all submitted Concept Notes and Funding Proposals assigned to own division (Public sector projects – M&A / Private sector projects – PSF)	High							
0030	Dashboard for Task Manager/ Task Support (Internal Reviewer)	Task Manager/Task Support should be able to see submitted Concept Notes and Funding Proposals that have been assigned to them by Task Lead.	High							
0031	Dashboard for Technical Reviewers (Internal Reviewer)	Technical Reviewers should be able to see submitted Concept Notes and Funding Proposals that have been assigned them by Task Manager/Support	High							
0032	Dashboard for SMT (Internal Reviewer)	SMT should be able to see submitted Concept Notes and Funding Proposals that have been assigned them by Task Manager/Support	High							

0033	Dashboard for iTAP (External Reviewer)	Independent Technical Advisory Panels (TAP) should be able to see submitted Funding Proposals that have been assigned to them by Task lead or Officer in charge of pipeline. They will not be required to see all the internal review processes. They should be only able to see the documents assigned to them.	High							
0034	Dashboard for Board Members/ Advisors (External Reviewer)	Board Members and Advisors should be able to see Funding Proposals that have been assigned to them by Task Lead or Officer in charge of pipeline. They will not be required to see all the internal review processes. They should be only able to see the documents assigned to them.	High							
0035	Filter/Search Function	For both AE and GCF users, there should be filter/search functions	High							
0036	Project Summary Page	When AE or GCF users clicks the project name or ID, they system should lead them to project summary page where it outlines brief summary of the project	High							

2.1.4 Review Management

The solution should handle below standard workflow but should also allow different dynamic workflow by application.



ID	Concept Note & Funding Proposals Requirements			Vendor						
	Short Name	Description	Priority	Fully Available	Partial (%)	N/A	Gap (%)	Gap Impact	Gap Addressing Mechanism	Comment/Observation
0037	Form Submission	Accredited Entity Submits CN/FP	High							
0038	Review Process	Task Lead receives notification email with link, reviews CN/FP and categorizes them into three types: Public Sector Projects/ Private Sector Projects/ Public-Private Partnership. According to its type, the Task Manager/Task Support (TM/TS) from M&A and PSF team are assigned	High							
0039		TM/TS reviews the application, make comments and sends it back to AE								
0040		AE reviews, makes comments and submits its revision. This particular steps can happen numerous times until TM/TS are satisfied with the documents (completeness check)								
0041		TM/TS assigns technical reviewers for their review. TM/TS fills out assessment sheet								
0042		Technical reviewers review the documents and make comments/asks questions in assessment sheet.								

0043		TM/TS sends back the documents to AE for their responses								
0044		AE makes comments and submits the revised document								
0045		Once Technical reviewers have sufficient information, they need to fill out assessment finding and electronically sign off to confirm their compliance check (Mandatory to move to next step) This step also can happen numerous times until technical reviewers are satisfied with the documents								
0046		Two or more Technical Reviewers should be able to fill out the assessment finding simultaneously								
0047		TM/TS submits last version of Funding Proposal / Project Assessment finding to Senior Management Team (SMT)								
0048		SMT makes comments/ recommends revisions								
0049		SMT should electronically sign off to confirm their completeness check								
0050		TM/TS sends back comments to AE								
0051		AE revises the FP and submits the revised FP								
0052		TM/TS submits FP to SMT for final comments								
0053		Once SMT confirmation is received, TM/TS sends FP/Assessment finding (not assessment sheet) to TAP for review. TAP fills out its own assessment								
0054		Once TAP review is completed, TM/TS compiles the documents and send it to the Board/advisors for their review								

0055		Only Funding Proposals are uploaded on GCF website as final step. It is important to note that FP from public sector are uploaded as is, FP from private sector are modified when uploaded to GCF website								
0056		Allow only selected files to be sent to certain users (board/advisors to see only selected files)								
0057		It is important that once AE submits the forms, the solution should be able to prevent further modifications to a proposals, unless approved by TM/TS (date/time stamps for revisions would be ideal)								
0058		It is also important that once FP is submitted, the FP should be marked with watermark (reviewer's name, date and time) for all reviewers								
0059		It is also important for the solution to monitor and track missing items or required documents. For example, no-objection letter must be received by the Nationally Designated Entities within 30days and we cannot proceed the FP review if it is missing. It is important for the solution to flag this and remind AE and TM/TS								
0060	Comments	The solution should allow multiple reviewers each review a proposal on a number of different factors and add comments (version and date they reviewed tracking)	High							
0061		The solution should allow internal reviewers see each other's comments	High							
0062	Spelling Check	Spell-check	High							
0063	Workflow support	Allow the Fund to define automatic steps and rules or workflow for the review process	High							

0064	Historical Relationship Details	History of a relationship with prospective applicants, for example, what types of instruments they have applied for or been given in the past	High							
0065	Track change	Ideal for Reviewers to make comments like word online (with track changes/comments and etc.)	High							
0066	Review applications in a meeting	A group of people can view a batch of applications in a meeting so that they can come to a joint recommendation. The recommendations from all previous recommendation stages must be visible for each application	Medium							
0067	Generate meeting minutes	GCF user can generate meeting minutes so that a summary of all the recommendations/ decisions can be circulated to the attendees and other interested parties	Low							
0068	Document forms at different stages	Checklist, review forms, monitoring forms, financial and completed proposal evaluations and technical sign off documentation to be provided	High							
0069	Text Fields	Include drop-downs, checkboxes and text fields in application	High							
0070	Dynamic Workflow	Dynamic workflow by application is required	High							
0071	Custom Workflow	Custom workflow by application is required	High							
0072	Confidential comment section for GCF	Confidential comment section for GCF is required. This confidential comments should not be visible to AE but should be only visible to assigned people	High							
0073	Change Log	Change log of the documents needs to be available to GCF/AE	High							

2.1.5 Communications with Accredited Entities

ID	Concept Note & Funding Proposals Requirements			Vendor						
	Short Name	Description	Priority	Fully Available	Partial (%)	N/A	Gap (%)	Gap Impact	Gap Addressing Mechanism	Comment/Observation
0074	CN/FP revision	AE should not be able to revise CN/FP once submitted. They should be only able to revise/edit once TM/TS sends back	High							
0075	Communication Capture	Capturing all communications/exchanges related to projects	High							
0076	Template Letters/Emails	Create and use letters/ emails template	High							
0077	Condition tracking (Once project/programme(s) is(are) approved)	[Prior to Disbursement] General condition for all projects/programmes: 120 days for internal approval (legal document) / 180 days for FAA (Legal document) To proceed, OGC's clearance is needed.	High							
		[Prior to Disbursement/During implementation(in some cases)] Condition(s) given to project/programme: If a project has been approved by the Board with 'project specific condition(s)', it should be inserted in tracking system (alert system: showing the number of days passed since approval (if it's pending)/ date the condition fulfilled)	High							
0078	Implementation of Information disclosure policy	Alert system: showing how many days are left and sending alert XX days in advance from its due. (the due varies depending on ESS category of project/programme)	High							

		Tracking system: showing if they fulfilled(date)/pending (number of days left by due date)/overdue/Not applicable	High							
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2.1.6 Internal & External Email Notifications

The solution is required to allow Fund to send email notifications – e.g. acknowledgement email, reminder notification, late notification, etc. - to entities at various points in the process and auto business process based on the business rule setting.

ID	Concept Note & Funding Proposals Requirements			Vendor						
	Short Name	Description	Priority	Fully Available	Partial (%)	N/A	Gap (%)	Gap Impact	Gap Addressing Mechanism	Comment/Observation
0079	Email Notification content	Email notification content should contain link to the document, FP information (ID and the project name) and the task to be conducted	High							
0080	Email Integration	The solution should allow seamless integration with GCF email server and automatically store all communications related to Funding request – perhaps with the subject containing specific Identification.	High							
0081	External Email Notification	AE should be able to receive email notifications whenever reviewers sends back the forms and send messages	High							
0082	Internal Email Notification	TM/TS should receive email notification once they are assigned on a project by TL	High							
0083	Internal/External Email Notification	TM/TS should receive email notifications whenever AE/Technical Reviewers/SMT/TAP makes comments on FP and send messages	High							

0084	Internal Email Notification	TR should receive email notifications whenever TM/TS and SMT makes comments on FP and send messages	High							
0085		SMT should receive email notifications when TM/TS sends FP for their review	High							
0086		SMT should receive email notifications when TM/TS sends FP for their review	High							
0087	External Email Notification	Board/advisors should receive email notification when administrator send FP for their review	High							
0088	Email Audit Trail	All communication associated to one file ID to be accessible for audit purposes	High							
0089	Deadline	Each process step to have deadlines and the user is warned	High							

2.1.7 Amendments & Phases (by M&A)

Project amendments and phases need to be handled by the solution during the project approval or later during project execution phase.

2.1.8 Reporting Requirements

The solution is required to produce standard reports, ad-hoc reports, and on demand reports across entities, process, regions, etc. The solution should be able to generate reports in pie chart, bar chart, table and etc.

ID	Concept Note & Funding Proposals Requirements			Vendor						
	Short Name	Description	Priority	Fully Available	Partial (%)	N/A	Gap (%)	Gap Impact	Gap Addressing Mechanism	Comment/Observation
0090	Visibility	Reporting function only available to selected users	High							
0091	Dashboard Summary info requirement	Dashboard Summary should contain following information: <ul style="list-style-type: none"> - Regions - Instrument types - Project Sizes - Statuses - Total spent, committed amounts by name of the entities - New FPs/CNs by date - Priority - Mitigation & Adaptation type - Impacts 	High							
0092	User defined columns	Users should be allowed to add column of the information they want to see	High							
0093	Dashboard coverage	The reporting function should cover all types of financial instruments	High							
0094	Timeline Tracking	Project timeline as well as disbursement timeline to be generated and systematically tracked and monitored	High							

0102	Dormant Organizations	system administrator can identify when a registered organization has become dormant so that their associated data can be archived as a performance measure	High							
0103	Prevent Conspicuous Organization Registration	A system administrator can authenticate attempts to register organizations with conspicuous details so that they can minimize fraud and duplicate organizations	High							
0104	Shadow a public user	GCF or Solution system administrator can "shadow or impersonate" a user (i.e. see the users' project funding application form) so that they can provide on-line or telephone support (this needs to be done without having to borrow AE's log-in details)	High							
0105	Internal Users	List of Internal GCF reviewers: <ul style="list-style-type: none"> - Task Lead - Task Manager/Support - Officer in charge of pipeline - Technical Reviewers (Risk Manager, Legal Counsel, Compliance Officer Finance Officer, Gender Specialist, Environmental Social Safeguard (ESS) Specialist, Monitoring & Evaluation (M&E) Specialist) - Senior Management Team (SMT) 	High							
0106	Database per division	TM/TS for each division has access to own division's database only.	High							
0107	Implementation phase database for M&E	For M&E function in the future, during the implementation phase, log-frame part data in each division's database (indicator, baseline, targets, etc) should be migrated and aggregated in one database and it should be able to be used as base information in tracking each project/programme's progress. In	High							

		doing so, data extracted from annual performance reports (APR) should also be put in the database for comparison of information between they put in FP and that in APR. *Or, data migration/validation tool needed.								
0108	User Management	The Administrator should be able to activate/deactivate any user	High							
0109	Reassignment	AE should reassign their users within the organization after GCF's approval.	High							
0110		TM/TS, Technical Reviewers, SMT can be additionally assigned and removed at any time by Task Lead or Administrator depending on the situation (ex. sick leave, vacation and etc.)								
0111	Log-in Credentials	Users should be able to easily reset lost credentials	High							
0112	External Reviewers	External Reviewers: - TAP - Board/Advisors - Others	High							
0113	Terms and Conditions	All users, including GCF staffs should agree on terms and conditions page when they first log-in (one-time).	High							
0114	Create user group	A system administrator to create a group of users	High							
0115	Assign roles to groups	A system administrator can assign roles	High							

3. Private Sector Facility (PSF) Specific Requirements: Private Sector Projects

- Private Sector Database should be only reviewed by PSF staffs and assigned reviewers
- Private sector projects may have different workflow or approval list

4. Mitigation & Adaptation (M&A) Specific Requirements: Public Sector Projects

- Public Sector Projects should be reviewed by M&A staffs and assigned colleagues (Administrator need to easily modify it.)

5. Public Private Partnership (PPP) Projects Requirements:

- This projects needs to be reviewed by both M&A and PSF users

6. Monitoring & Evaluation (M&E) Specific Requirements: Performance & Monitoring

Project/programme level:

ID	Concept Note & Funding Proposals Requirements			Vendor						
	Short Name	Description	Priority	Fully Available	Partial (%)	N/A	Gap (%)	Gap Impact	Gap Addressing Mechanism	Comment/Observation
0116	Link to template and report	Integration with the funding proposal template: the section/annex related to the project logical frameworks (Results Management Framework(standardized log-frame with indicators in Performance Measurement Frameworks, enabling fund level M&E)+project level log-frame (AE develops with their own indicators)) and project workplans will be the reporting basis/outline for the accredited entity	High							
0117	Qualitative data	Intake of qualitative data with no limits in the number of words that can be received	High							
0118	Quantitative data	Intake of quantitative data (indicators – to be expressed as figures, percentages or scorecards)	High							

0119	Document by applicant	Intake of documents that can be uploaded and tagged by the accredited entity as necessary (for example "evaluation report")	High							
0120	Alert system to AEs	Each project/programme has different timeline. TM/TS should be able to insert expected date of APRs/Interim evaluation report/Final evaluation report in accordance with the project/programmes' termsheet. All dates should be tracked and linked to alert system sending email and/or showing flag to AEs	High							
0121	Feedback	Interface for feedback between the Secretariat and the entities concerning the submission of the reports	High							
0122	Dashboard (indicator)	Visualization of indicator progresses towards the targets set in the logical frameworks (at project, country, regional and fund level)	High							
0123	Dashboard (workplan)	Visualization of the associated progress in relation to the workplan submitted in the funding proposal. It is useful a status check system for each output in the workplan so that the entity can mark each output of the project in three types of status "not started" - "in progress" or "completed"	High							
0124	Sign off	Sign off mechanism – since it is necessary that once a year the accredited entity officially submit the "annual performance report" – while the system can be updated continuously – at a certain point in the year the entity will be required to "officially" submit the report (narrative and indicators) therefore the system should guarantee: <ul style="list-style-type: none"> ○ Once the entity check the annual report as "submitted" there is an official notification to the Secretariat. 	High							

		<ul style="list-style-type: none"> Once sign-off and submitted the report cannot be changed. <p>All the information in log-frame in the report should be extracted and put into database for future M&E / analysis / visualization. (if possible)</p>								
0125	PDF conversion	Export function of the information submitted in PDF	High							
0126	Fund's RMF / PMF	Dashboard showing frequency analysis and consolidation of the indicators at country, regional and global level	High							
0127	Reporting	Exporting the dashboard in PDF and xls. Formats.	High							

7. Finance Specific Requirements

ID	Concept Note & Funding Proposals Requirements			Vendor						
	Short Name	Description	Priority	Fully Available	Partial (%)	N/A	Gap (%)	Gap Impact	Gap Addressing Mechanism	Comment/Observation
0128	Financial data transfer	Financial data should be part of CN and/or FP (e.g. bank name and address, account number and account holder's full name, swift (BIC) code, IBAN, etc.) and Finance should be able to review the information	High							
0129	Payment schedule transfer	Payment schedule or structure should be part of CN and/or FP and Finance should be able to review the information	High							
0130	Formal document required	Should have a formal document signed by both parties (e.g. contract) once FP is finally approved by the Board	High							

0131	Invoice to be received	Suggest to receive an invoice for each payment from AE according to the payment schedule or under the ad-hoc payment circumstance	High							
0132	Multiple currencies	The amount should be able to be set up with multiple currencies	High							
0133	Payment authorization process	Should be able to set the payment authorization level and process (e.g. multiple levels of reviews separated from the preparer) and see when and who prepared and approved the payment for the approved payment	High							
0134	Payment request	Finance initiates disbursement only when a payment request is received from TM	High							
0135	Payment lock feature	Finance should be able to see whether the FP is finally approved by the Board so as not to proceed with any disbursement for unapproved FPs (better have a payment lock feature for all unapproved FPs)	High							
0136	Historical date and aging report generation	Should be able to generate the historical data (e.g. all payments made to a certain project for the last 30, 90, 180 days, etc.) as well as the aging report (e.g. all or a certain outstanding payment to a certain project due within next 30, 90, 180 days)	High							
0137	Batch payment	Should be able to make a batch payment	High							
0138	Partial payment	Should be able to spit the payment or make a partial payment	High							
0139	Payment to be linked to performance	Should be a kind of link between M&E and Finance to hold the payment in the case when M&E Performance KPI is not achieved	High							
0140	Advance payment and payment reimbursement	Should have a function to make a payment upfront (i.e. advance payment) and to reimburse a payment for a certain reason (i.e. payment reimbursement)	High							

0141	Funding source	Should be able to see the funding source for each payment (e.g. grant, loan, etc.)	High							
0142	Payment tracking	All payment should be tracked, for example, by budget allocated, amount approved, amount paid, unallocated, etc.	High							
0143	Download and print	Should be able to download and print at all stages of the payment process as an excel and a pdf format	High							
0144	Max grant value	Better have a function to set the max grant value for each project	Medium							
0145	Link to ERP	Better be able to link to ERP	Medium							

8. Compliance Specific Requirements

ID	Concept Note & Funding Proposals Requirements			Vendor						
	Short Name	Description	Priority	Fully Available	Partial (%)	N/A	Gap (%)	Gap Impact	Gap Addressing Mechanism	Comment/Observation
0146	Conflict of Interest	All the reviewers should be asked to click Conflict of Interest Agreement for each Concept Note or Funding proposal they are asked to review	High							

9. Technical requirements/specifications

ID	Concept Note & Funding Proposals Requirements			Vendor						
	Short Name	Description	Priority	Fully Available	Partial (%)	N/A	Gap (%)	Gap Impact	Gap Addressing Mechanism	Comment/Observation
0147	Dependency	The solution need to be integrated into financial system which can handle other financial instruments incl. loan, equity, guarantee, etc. but it is not mandatory	High							
0148	Document Management	Version control, Track change, check-in/check-out and All standard file formats need to be supported	High							
0149		Electronic signature or certification of submitted documents. This will be used when AE submits the proposals and after the review process for each reviewers.	High							
0150		All documents/ letters to be automatically stored in one place to make sure that all documentation and correspondence related to the project to be stored in a single place	High							
0151	Data Management	The solution should support data migration, imports and exports of data to formats including Word, PDF, Excel, CSV, XML, etc. to the solution.	High							
1512		The system stores attached documents in the database as objects rather than links OR the system uploads attached documents to the server and stores a link to that uploaded file in the database.	High							
0153		Automatically saves data intermittently throughout a web session in case of system crash, or at a minimum prompts user to save data regularly.	High							

0154	Search function	The solution should allow reviewers to have advanced search functions with following information: <ul style="list-style-type: none"> • Name of Accredited Entities • Impacts type (Mitigation & Adaptation) • Instrumental type • Geography • Name of Task Manager • Private/Public Type • Application ID • Funding Amount • Status • Project Amount 	High							
0155		The solution should also allow the users to search the contents of the file attachment	High							
0156	Compliance	Comply with information security standards such as ISO, Safe Harbor, FISMA and etc.	High							
0157	Training	Provides user training in person and remotely	High							
0158	Scalability	The solution scales based on varying volumes of workload. At peak usage times, the solution will have at least 50 concurrent users	High							
0159	Interface/Integration	The solution feeds GCF accounting system and financial system, which will be launched later. The solution would interface with the systems to request payments and to track and validate financial data.	High							
0160	Watermark	All documents to be have watermarks (user name, timestamp)	High							
0161	Print	Hardcopy to be printed with watermark (user name, timestamp)	High							



0162	User Activity Audit	All user activity should be traceable by the system administrator (history of which file has been accessed by whom and when)	High							
0163	Data Encryption	Manage data encryption	High							
0164	Auto-save	A user's work is saved automatically while completing a form so that they don't lose their work	High							



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Annex IX: Dashboard/Portal Minimum Requirements

a) Accredited Entities:

AEs should be able to see lists of Concept Notes and Funding Proposals when they log in – this includes submitted and work in progress Concept Notes and Funding Proposals. The minimum information for the AE on the Dashboard/Portal can be found in Annex I.

- Project Name
- Project ID
- Type (Funding Proposal/ Concept Note)
- Countries
- Review Status
- Funding Proposal Requested Amount

b) Green Climate Fund Reviewers

The Reviewers should be able to see list of submitted Concept Notes and Funding Proposals when they log-in. They Dashboard should be different for different reviewers:

i) Administrator - Internal

Administrator should be able to see all submitted Concept Notes and Funding Proposals.

- Project Name
- Project ID
- Entity Name
- Type (Funding Proposal/ Concept Note)
- Type (Public/Private)
- Countries
- Review Status
- Secretariat Review Status
- TAP Review Status (TAP : Technical ...)

ii) Task Lead – Internal

Task Lead should be able to see all submitted Concept Notes and Funding Proposals.

- Project Name
- Project ID
- Entity Name
- Type (Funding Proposal/ Concept Note)
- Type (Public/Private)
- Countries
- Review Status
- Secretariat Review Status
- TAP Review Status

iii) Officer in charge of Pipeline for each division (M&A and PSF) - Internal

The officer in charge of Pipeline for each division should be able to see all submitted Concept Notes and Funding Proposals assigned to own division (Public sector projects – M&A / Private sector projects – PSF)

- Project Name
- Project ID
- Entity Name
- Type (Funding Proposal/ Concept Note)
- Type (Public/Private)
- Countries
- Review Status
- Secretariat Review Status
- TAP Review Status

iv) Task Manager/Task Support - Internal

Task Manager/Task Support should be able to see submitted Concept Notes and Funding Proposals that have been assigned to them by Task Lead.

- Project Name
- Project ID
- Entity Name
- Type (Funding Proposal/ Concept Note)
- Type (Public/Private)
- Countries
- Review Status
- Secretariat Review Status
- TAP Review Status

v) Technical Reviewers - Internal

Technical Reviewers should be able to see submitted Concept Notes and Funding Proposals that have been assigned them by Task Manager/Support

- Project Name
- Project ID
- Entity Name
- Type (Funding Proposal/ Concept Note)
- Type (Public/Private)
- Countries
- Review Status

vi) SMT (Senior Management Team) - Internal

SMT should be able to see submitted Concept Notes and Funding Proposals that have been assigned them by Task Manager/Support

- Project Name
- Project ID
- Entity Name
- Type (Funding Proposal/ Concept Note)
- Type (Public/Private)
- Countries
- Review Status
- Secretariat Review Status

vii) TAP – External Reviewers

Intendent Technical Advisory Panels (TAP) should be able to see submitted Funding Proposals that have been assigned to them by Task Manager/Support

- Project Name
- Project ID
- Entity Name
- Type (Funding Proposal/ Concept Note)
- Type (Public/Private)
- Countries

viii) Board Members/Advisors - External

Board Members and Advisors should be able to see Funding Proposals that have been assigned to them by Task Manager/Support

- Project Name
- Project ID
- Entity Name
- Type (Funding Proposal/ Concept Note)
- Type (Public/Private)
- Countries

Annex X: Relevant Board Documents

A. GCF/B.12/Inf.05 - Review of the initial proposal approval process (Progress Report)
[http://www.greenclimate.fund/documents/20182/184476/GCF_B.12_Inf.05 -
_Review_of_the_initial_proposal_approval_process_Progress_report_.pdf/7eb8a918-4de5-453f-
ba64-4ae18906712f?version=1.1](http://www.greenclimate.fund/documents/20182/184476/GCF_B.12_Inf.05_-_Review_of_the_initial_proposal_approval_process_Progress_report_.pdf/7eb8a918-4de5-453f-ba64-4ae18906712f?version=1.1)

B. GCF/B.11/05 – Initial monitoring and accountability framework for accredited entities
[http://www.greenclimate.fund/documents/20182/87610/GCF_B.11_05 -
_Initial_monitoring_and_accountability_framework_for_accredited_entities.pdf/9dfc58ab-6653-
41f7-af8b-273fef5c6603?version=1.1](http://www.greenclimate.fund/documents/20182/87610/GCF_B.11_05_-_Initial_monitoring_and_accountability_framework_for_accredited_entities.pdf/9dfc58ab-6653-41f7-af8b-273fef5c6603?version=1.1)

Decision B.11/10
[http://www.greenclimate.fund/documents/20182/76153/DECISION_B.11_10 -
_Initial_monitoring_and_accountability_framework_for_accredited_entities.pdf/b06dddfc-2d18-
4675-9d2f-d3e81de6ba99?version=1.1](http://www.greenclimate.fund/documents/20182/76153/DECISION_B.11_10_-_Initial_monitoring_and_accountability_framework_for_accredited_entities.pdf/b06dddfc-2d18-4675-9d2f-d3e81de6ba99?version=1.1)
