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# 2500 EEB Project & Finance Tools Request for Information



## 1. Project presentation

### 1.1 EEB (European Environmental Bureau)

The EEB (European Environmental Bureau) is Europe's largest network of environmental citizens' organisations. We bring together over 160 civil society organisations from more than 35 European countries. We stand for sustainable development, environmental justice & participatory democracy.

As an umbrella network, most of our projects are about advocacy, about pushing for stronger policies or making sure that policies and laws that exist are implemented. We also want to make sure that civil society has the capacity it needs to be involved and is properly consulted. We also run a lot of campaigns in coalitions and partnerships. See:

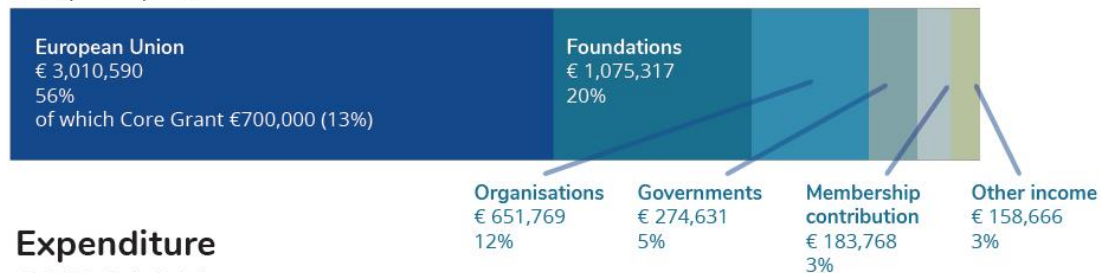
<https://eeb.org/who-we-are/our-members/>  
<https://eeb.org/who-we-are/staff/>  
<https://eeb.org/homepage/partners/>  
<https://eeb.org/homepage/donors/>

EEB is part of the Green 10 coalition (ten of the largest environmental organisations and networks active on the European level - <https://green10.org/>).

EEB's activities are funded by different sources (figures below from our 2019 annual report):

#### Income

€ 5,354,742



#### Expenditure

€ 5,324,311



Total reserves end 2019: € 532,831 (of which € 30,430 integrated in 2019)



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### 1.2 Objectives the EEB project

The EEB has grown rapidly over the last couple of years. The EEB Brussels team comprises more than 65 staff members working under the direction of the Secretary General on policy, communications, membership and events, project management, campaigning, finance, and administration.

The tools and routines used for project- and finance-management were put in place when the EEB was a much smaller NGO and are no longer fit for purpose. The implementation of (a) new tool(s) is on top of the EEB's priorities. It should lead to a higher efficiency in the operations by integrating the processes within the organisation, and by supporting the digital collaboration between the different stakeholders.

The tool will be the source of timely, reliable, and validated data needed for reporting on the usage of the funds which are being trusted to EEB. This includes financial and operational reporting for the EEB management, the donors (private and institutional), the governmental agencies, member organisations, EEB's supporters, and the public.

### 1.3 Some figures

Some figures	Total
Policy staff, including interns	37
Finance and administration staff, including interns	13
Comms and Membership staff	9
Management staff (Coordination Unit)	7
Project proposals per year	70-80
Grants per year	60 to 70
Active projects per year	70-80
Average project duration	1 year or more

## 2. Key features of the new application

### 2.1 High-level architecture

The scope of the new EEB application covers the following main domains:

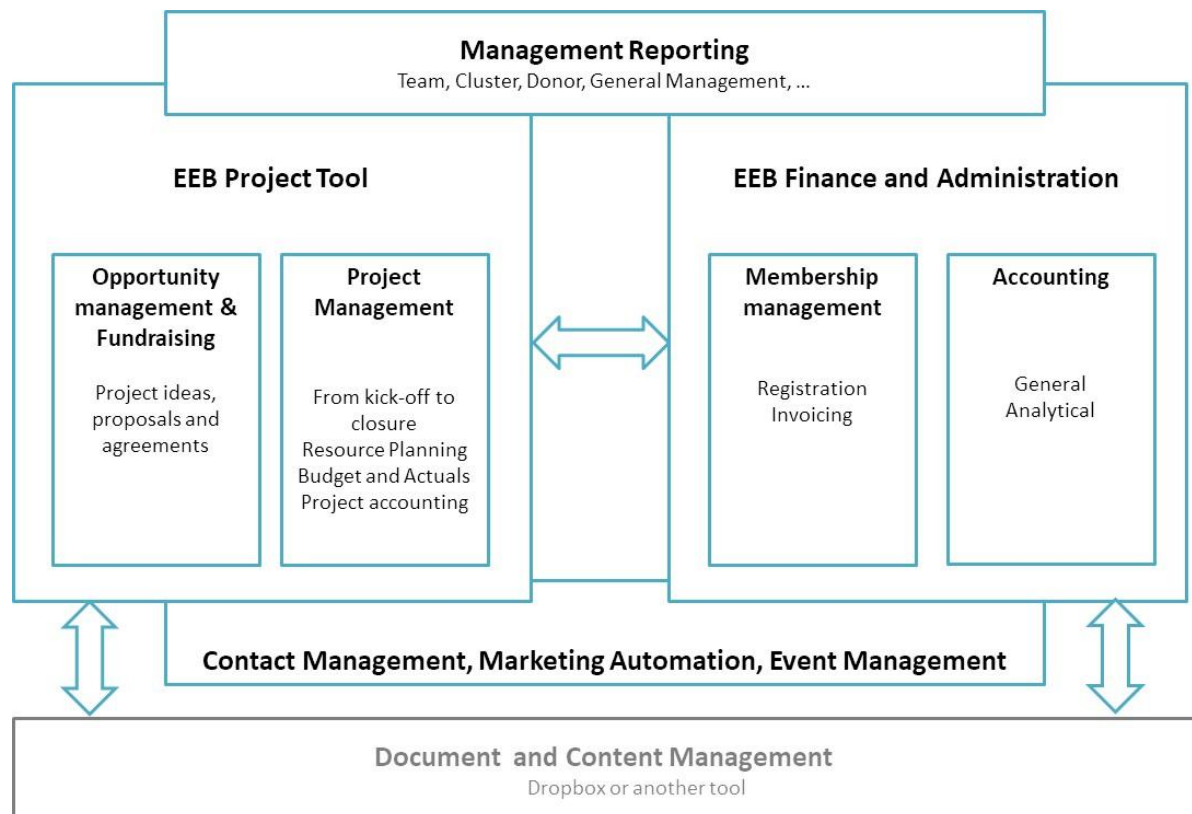


Figure 1: To Be architecture of the EEB Project and Finance tools

The architecture represents the final state. Depending on the priorities, the available budget, the EEB organisational resources, and the recommendations of the software partner, a phased implementation approach can be adopted. The definition of the scope and deliverables per phase will be part of the deal shaping process and will be included in the final service contract.

#### Important

**An integrated, native accounting module is not mandatory. If your solution does not provide a native accounting software, you will be asked to specify the following in your proposal:**

- **How an external accounting software may be integrated**
- **For which accounting software a standard integration layer is already available**
- **Which accounting software is recommended for your solution.**

## 2.2 Key features of the new tool

### 2.2.1 Resource planning

- Staff capacity plan including availability for project work
- Assign staff to potential projects and to approved projects
- Have an overview of the unassigned capacity per staff member, per team, on and EEB level
- Compare budgeted project hours to actual hours reported

### 2.2.2 From project idea to project execution

The Project Tool supports all stages in a project's lifecycle:

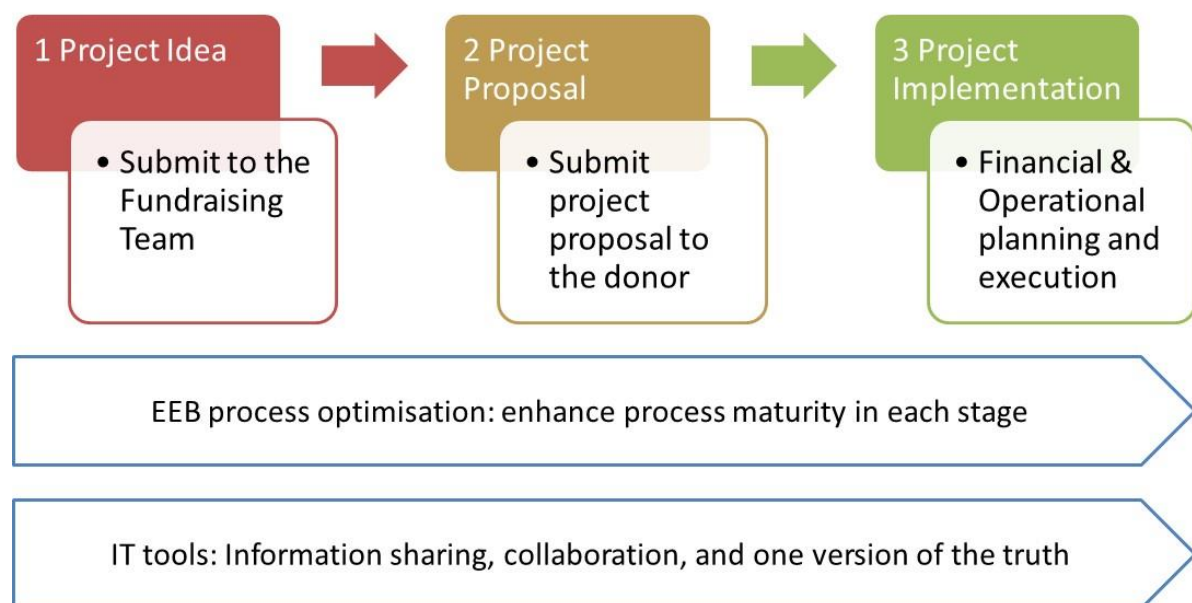


Figure 2: From project idea to project execution

### 2.2.3 Policy officer toolbox

The Project Tool has features to facilitate the daily job of the project officer:

- Planning (milestones and activities)
  - Reporting calendar per donor
  - Activity calendar per partner
  - Project activity calendar
- Timesheet reporting
- Expense registration, approval, and reimbursement
- Purchase invoice approval

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- Project dashboard, per project and consolidated for multiple projects:
  - Milestone and activity tracking
  - Funds (committed vs. paid)
  - Resources (planned vs. actual)
  - Budget (budget vs. actual)
  - Estimate to Complete and Estimate at Complete
  - With drill-down from the highest level to the detail and the related documents

#### 2.2.4 Management reporting

Provide team leads, line management, EEB management, and the EEB board with accurate and timely reports and dashboards, e.g.:

- Project budget structure with donor budget view and EEB budget view
- Resource overview per month and YTD: planned, actual, available for allocation
- Funds overview per month and YTD: underspend and overspend
- Variance reports on projects expenses (budget vs. actual)
- Variance reports on project resources (time budgeted vs. actual)
- Variance reports on project performance (planned dates vs. actual dates)
- Summary overview of project profitability per policy area, donor, ...
- Trends analysis over multiple years
- Grant usage reporting
- Cash flow planning on project level and on global level

The Finance tool must include an analytical module which enables a multi-dimensional analysis:

- Project
- Cluster/Policy area
- Donor
- Grant Code
- Cost type
- Cost sub type
- Cost Centre

#### 2.2.5 Contact management for donors, project stakeholders and EEB members

- Contact and relationship management
  - Integrated with the Project Tool
  - Manual and automated logging of EEB interactions with contacts
  - Contact segmentation
- Membership management
  - Processing membership applications
  - Onboarding and offboarding
  - Membership fee invoicing and payment follow-up
- E-mail management (management of Outlook 365 mailing-lists plus massmailings/newsletters - native module or link with Mailchimp)
- Event management
  - Event organisation
  - Event registration management

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- Event venue and accommodation management

### 3. Next steps

If your company is interested in receiving the complete Request for Proposals (RFP) which includes detailed specifications and instructions for your proposal, please contact:

Emma Ernsth  
European Environmental Bureau  
Director of Membership and Development  
emma.ernsth@eeb.org

The detailed Request for Proposal documents will be returned to you in reply to your mail. Each vendor will have three weeks to complete and return the complete RFP and budget.

**Deadline for requests to receive the detailed tender specifications: Friday 16 April 2021 at 6pm CET**

Those applicants whose tenders are shortlisted will be contacted in May/June 2021 with meetings and interviews taking place in May/June 2021. We may in the meantime contact you for further information. We will expect to sign a contract in July 2021 and start the collaboration in September 2021 the latest.

*Disclaimer: Submitted documents will not be returned. The EEB will inform all bidders about the EEB's decision in relation to their bid. Bidders may ask for feedback on their bid. However, the EEB's decision will be considered as final, full details will not necessarily be disclosed and there is no possibility of appeal.*

### 4. Confidentiality

This RFI contains information which belongs to the EEB and is published on the basis that it must only be used by employees or professional advisors of your company for the purpose of considering participating in the tender process.

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*E-mail: eeb@eeb.org*

*Website: www.eeb.org*

*EC register for interest representatives: Identification number 06798511314-27*

*International non-profit association - Association internationale sans but lucratif (AISBL)*

*BCE identification number: 0415.814.848*

*RPM Tribunal de l'entreprise francophone de Bruxelles*