



REQUEST FOR INFORMATION (RFI): DIGITAL GRANT MANAGEMENT SYSTEM FOR WWF Norway

| | |
|-------------------------------|--|
| Date of issue: | 30.06.2026 |
| RFI no.: | 2026-06-01 |
| Contract title: | RFI Grant management system for WWF |
| Closing date: | 21.08.2026 at 16.00 CEST |
| Contracting Authority: | WWF Norway Pilestredet 8, 0180 Oslo, Norway E-mail address: tender@wwf.no Contact persons: Tim Enebakk, Head of Finance and Administration tenebakk@wwf.no Johanne Walthinsen, Project Manager GMS jwalthinsen@wwf.no |

Invitation

WWF Norway invites interested suppliers to respond to this Request for Information (RFI) regarding the provision, implementation and support of a Digital Grant Management System (GMS).

This procurement will be conducted in two separate stages:

1) Request for information (RFI)

Through this RFI process, interested suppliers are invited to provide information regarding their proposed solution, relevant experience, technical capability, and organisational capacity. WWF's goal is to learn more about solutions available in the market through supplier dialogue with the aim to formulate detailed requirements and evaluation criteria for phase two.

2) Formal Procurement Process

Based on our learning from phase one, we will develop and publish a final Request for Proposals (RFP). In the second round, suppliers will submit detailed proposals, including technical, commercial and contractual information. Participation in this RFI does not guarantee invitation to the second stage and does not constitute the award of a contract, but early engagement could be advantageous for participating suppliers.

Please find enclosed the following documents, which constitute the RFI Dossier:

- 1) Instructions to Suppliers (this document)
- 2) Annex 1: Background and High-Level Requirements
- 3) Annex 2: Organisation and Methodology
- 4) Annex 3: RFI Submission Form

Confirmation of Participation

Suppliers are requested to confirm by email to tender@wwf.no by 10.08.2026 whether they intend to submit an RFI response. A decision not to participate will not prejudice any future opportunities to participate in WWF Norway procurement processes.



A. INSTRUCTIONS TO SUPPLIERS

In submitting a proposal, the Supplier accepts in full and without restriction the conditions included in this procedure. The Suppliers are expected to examine carefully and comply with all instructions, forms and specifications contained in this RFI Dossier.

A.1. Scope of services

The Services required by the Contracting Authority are described in the Background and High-Level Requirements in Annex 1. Suppliers should clearly identify any aspects of the requirements that are not supported by the proposed solution.

A.2. Cost of Proposal

The Supplier shall bear all costs associated with the preparation and submission of their proposal and the Contracting Authority is not responsible or liable for these costs, regardless of the conduct or outcome of the process.

A.3. Clarification of RFI documents and additional information

Suppliers may submit questions in writing by 07.08.2026 at the latest. NB! Specify the contract title and reference number in your e-mail. Information regarding interpretation of this Request for Information must be requested in writing to tender@wwf.no. The answers will be shared on WWF Norway's website (www.wwf.no) after the deadline to submit questions have expired.

The RFI process will include presentations and interviews with selected suppliers at a later stage. Until then, to ensure equal treatment of all suppliers, the Contracting Authority requests that all communication relating to this procurement is conducted through the formal channels described in this document. Suppliers should therefore not seek to arrange separate meetings or discussions with the Contracting Authority or its representatives during the RFI period.

A.4. Planned timetable

The Contracting Authority reserves the right to alter the dates and time in the following timetable, in which case all suppliers will be informed in writing, and a new timetable will be provided.

| Stage 1: RFI | Date | Time |
|--|-------------------|----------------|
| Deadline for request for any clarifications from the Contracting Authority | 07.08.2026 | By 16.00 CEST. |
| Date on which clarifications are issued by the Contracting Authority on WWF Norway's website, www.wwf.no | 12.08.2026 | |
| Deadline for submission of RFIs (closing date) | 21.08.2026 | By 16.00 CEST. |
| RFI review | September | |
| Presentations by selected suppliers | September/October | |
| Finalisation of requirements for RFP process | October | |
| Stage 2: Procurement | | |
| Request for proposals with detailed specifications published | November | |

All times are in the time zone of Norway (CET/CEST).

A.5. Exclusion from award of contracts

Contracts may not be awarded to Suppliers who, during the procurement procedure:

- (a) are subject to conflict of interest;
- (b) are guilty of misrepresentation in supplying the information required as a condition of participation and eligibility in the RFI procedure or fail to supply this information;



- (c) are bankrupt or is being wound up, whose affairs are being administered by court, has entered an arrangement with creditors, has suspended business activities or is subject of an injunction against running business by court.
- d) are the subject of proceedings for a declaration of bankruptcy, for an order for compulsory winding up or administration by court, or for an arrangement with creditors or of any other similar proceedings;
- e) have been found guilty of grave professional misconduct by any means which the grant recipient can justify;
- f) are not registered in a national official register or registered for declaration and payment of tax in accordance with national legislation;
- g) have not fulfilled obligations relating to payments of taxes or social security contributions;
- h) they or persons having powers of representation, decision-making or control over them have been convicted for fraud, corruption, involvement in a criminal organisation or money laundering;
- i) They or persons having powers of representation, decision-making or control over them have been convicted of an offence concerning their professional conduct;
- j) are unable or refuse to adhere with WWF's statement of principles (SoPs) on Human Rights, Gender Equality and Indigenous Peoples. The SoP is available here:

https://wwf.panda.org/principles_and_safeguards/our_principles/

A.6. Language of RFI submissions

The RFIs, all correspondence and documents related to the RFI exchanged by the Supplier and the Contracting Authority must be written in English.

Documents comprising the RFI

The Supplier shall complete and submit the following documents before submitting the RFI submission:

- a) RFI Submission Form (Annex 3) with supporting documents and duly completed and signed by the Supplier
- b) Organisation and Methodology using the structure in Annex 2.
- c) Company profile describing the Supplier's relevant experience, technical capabilities, and experience delivering comparable solutions.
- d) Copies of Supplier's audited financial statement for the last three years.

and other relevant information that should be made known to the Contracting Authority.

A.7. Financial proposal - Indicative Cost Information

Suppliers are requested to provide an indicative five-year total cost of ownership (TCO) for the proposed solution, broken down into the following categories, as applicable:

- Licence/subscription fees;
- Implementation and configuration;
- Development and customisation;
- Support and maintenance;
- Hosting and infrastructure;
- Training; and
- Any other significant costs associated with the proposed solution.

Suppliers should clearly state any assumptions underlying their estimates, including any assumptions regarding the number of users, implementation approach, data hosting locations, and expected level of support.

The cost information requested at this stage is indicative only and is intended to assist in understanding the affordability and long-term sustainability of proposed solutions. Suppliers are not required to submit binding commercial offers as part of this Request for Information .

Cost indications may be used to inform the design, scope and budget planning of any subsequent procurement process.



A.8. Submission of RFIs and closing date

RFIs must be received via e-mail to tender@wwf.no by 16.00 CEST, 21.08.2026. Any submissions received after that time will not be considered. No RFI may be changed after the deadline has passed.

The Contracting Authority reserves the right to call to interview the Suppliers having submitted proposals determined to be substantially responsive.

A.9. Cancellation for convenience

The Contracting Authority may for its own convenience and without charge or liability cancel the RFI process at any stage.

A.10. Data Protection and Privacy

The Contracting Authority may collect and process personnel data such as names, addresses, telephone numbers, email addresses, banking details and CVs. Such data will be used for the sole purpose of managing the procurement process and any subsequent Contract issued as a result of the procurement process, including transmission to bodies charged with monitoring and or inspecting procurement processes, in accordance with applicable EU, international and national law on data protection. Data may be stored for as long as a legitimate reason remains for its storage and up to a period of seven years.

Submission of and RFI response signifies the supplier's consent to such data collection and its processing

The General Terms and Conditions provide reference to the specific rights, and regulations related to the data that is stored.



Annex 1: Background and High-Level Requirements

1. Purpose

WWF-Norway is conducting this Request for Information (RFI) to better understand available solutions, supplier capabilities and implementation approaches for a future Digital Grant Management System. The information provided in this document reflects WWF-Norway's current understanding of its needs and desired outcomes. It is intended to help suppliers assess whether their solutions, experience and delivery capacity may be relevant.

This RFI is a market research exercise and does not constitute a call for competition, a pre-qualification process, or a commitment to procure. Participation in this RFI will not be used to qualify, rank, shortlist or exclude suppliers from any future procurement process.

The high-level needs and questions included in this document are indicative and are not formal qualification or evaluation criteria. Final requirements, procurement documents, qualification criteria and evaluation criteria will be set out in any subsequent procurement process.

Input received through this RFI may be used to further develop WWF-Norway's requirements, procurement documents and understanding of the market.

2. Background and Context

[WWF Verdens Naturfond](#) (WWF-Norway) is an independent Norwegian environmental organisation, established in 1970 and part of the international

World Wide Fund for Nature (WWF) Network. WWF's vision is a future where people live in harmony with nature. As one of the world's largest and most respected independent environmental organisations with offices in nearly 100 countries, it works to protect the diversity of species and ecosystems and to ensure the sustainable use of natural resources. The WWF-Norway office is situated in Oslo with 85 staff, working on environmental challenges both in Norway and globally. Its total turnover was NOK 277 million in 2025.

WWF-Norway supports over 25 WWF development projects in Africa, Europe, Asia and Latin America to implement projects in collaboration with around 80 civil society and network partners. These projects are funded through Norad, and also through private foundations as well as private donations.

Norad is the main donor for WWF-Norway's development projects. The current Norad portfolio consists of four signed agreements, mainly running for 3 years, with a total value of approximately NOK 260 million.

WWF-Norway is assessing options for improving its grant and project management. A needs assessment and workflow analysis carried out in 2025 identified opportunities to strengthen information management, workflow standardisation, task management, reporting, and collaboration across teams to improve efficiency and coordination.

WWF-Norway does not currently have a dedicated digital Grant Management System (GMS). WWF currently manages projects and grants through a combination of manual processes (for example Excel) and existing systems. Information is stored across different tools and locations, and several processes rely on manual follow-up and individual knowledge.

We estimate 50 active users of the system.

Key needs and improvement opportunities identified include:

- Improved visibility and accessibility of project and financial information across systems and teams. Opportunities to strengthen standardisation of workflows, roles, and responsibilities
- Need for stronger traceability and auditability of key decisions, approvals, and documentation
- Streamlined and efficient processes with reduced reliance on manual work and individual knowledge Need to strengthen continuity and knowledge retention across projects and staff changes
- Need for improved visibility through dashboards and reporting tools that provide relevant insights for different user groups and enabling improved communication of results
- Reduced reliance on Excel and manual processes, with possible direct partner submission and updating of project information, reports, and supporting documentation.

WWF is currently completing workflow mapping activities to further clarify requirements and support future system decisions.

3. Existing systems and tools

WWF Norway currently uses a number of systems and digital tools supporting different parts of project, grant, document, and financial management. Relevant systems currently include:

- Microsoft 365 environment, including Teams and SharePoint, used for collaboration and document management
- Dynamics 365, currently used by teams that are not involved in grant management but national advocacy, for arranging activities and events, keeping track of stakeholders etc. (sales enterprise licenses).
- Visma Global as the accounting and financial management system (Process is ongoing to move to a cloud-based accounting system).
- One Stop Reporting for financial reporting implemented in 2025 to make financial information more accessible for non-finance staff
- Excel-based tools supporting project and grant management activities
- Profundo CRM (used by the fundraising team), Dynamics 365 (used for advocacy and events), Simployer, Tidsbanken (time registration), Power BI.
- The future solution should consider WWF's existing digital landscape and avoid unnecessary duplication of functionality. Suppliers are encouraged to indicate how their proposed solution could integrate with, complement, or replace existing systems where relevant. WWF currently uses Microsoft 365, including Teams and SharePoint, for collaboration and document management. Suppliers are invited to describe any relevant considerations related to document management, collaboration, user access, information governance, and integration with WWF's existing technology environment.

4. Purpose and desired outcomes

The purpose of this Request for Information (RFI) is to identify solutions that can strengthen WWF's project and grant management processes while supporting efficient and compliant ways of working.

Desired outcomes include:

- Reduced administrative workload and manual follow-up

- Streamlined partner reporting
- Improved visibility and access to project, grant, and financial information
- Improved workflow consistency and compliance
- Improved collaboration and information sharing across teams
- Improved documentation and retention of institutional knowledge
- Improved continuity during onboarding and staff changes
- Reduced operational and compliance risks related to inconsistent processes, incomplete documentation, and reliance on individual knowledge
- Improved traceability and auditability of key decisions, approvals, and documentation
- Scalable and sustainable ways of working that can support evolving organisational needs
- More reliable and accessible reporting data to support monitoring, learning, donor reporting, and decision-making

5. High-level functional needs

User and access management

- Ability to manage different user roles and permissions
- Ability to easily assign access based on organisation (WWF or partner staff), team, function, or project responsibilities
- Support temporary delegation or reassignment of tasks and approvals during staff absence

Workflow and process management

- Support structured workflows across project and grant processes
- Allow for both mandatory and optional tasks
- Support task assignment, tracking, reminders, and approvals and signatures
- Support formal review, approval, and document signature processes where required
- Enable visibility of responsibilities, deadlines, and process status
- Support documentation of decisions and process history
- Allow flexibility for different grant types and workflows

Data and reporting

- Provide access to relevant projects and financial information
- Support dashboards and reporting for different user groups
- Enable monitoring of progress, deadlines, risks, and key indicators
- Support end-to-end traceability between plans, activities, results, budgets, and reporting
- Reduce manual reporting and duplication of work

Document management

- Support structured storage and retrieval of project and grant documentation
- Support version management and traceability of key documents
- Enable linkage between workflows and supporting documentation
- Preserve institutional knowledge and historical information

Other functional needs

- Support collaboration across departments and teams
- Support onboarding and knowledge sharing
- Provide a user-friendly experience that supports adoption and daily use
- Allow for future scalability and changes in organisational needs

6. Non-functional requirements

- Compliance with relevant data protection and privacy requirements
- Appropriate security and access control mechanisms
- Sufficient performance and reliability for day-to-day operations
- Support for training, maintenance, and user support
- User-friendly and accessible interface
- The system should operate in English
- The proposed solution should be provided as a Software-as-a-Service (SaaS) offering. WWF does not intend to host, operate, or maintain application infrastructure for the solution. Suppliers should describe their data hosting locations, responsibilities for maintenance and updates, service availability, backup arrangements, data storage locations and any infrastructure requirements on WWF's side
- Ability to integrate with WWF-Norway's existing systems and data landscape where appropriate, including collaboration platforms, document management solutions, financial systems, reporting tools, and future systems.

7. Implementation, configuration, and support considerations

WWF recognizes that successful implementation depends not only on system functionality, but also on configuration, implementation approach, user adoption, and long-term support. Suppliers are invited to describe their approach and capabilities related to the following:

- Ability to configure and tailor workflows, templates, roles, and processes to align with WWF's operational requirements while minimizing unnecessary customisation
- Support for future adjustments as workflows and organisational needs evolve
- Structured implementation approach, including phases, milestones, and roles/responsibilities
- Approach to data ownership and exit clauses and documentation
- Approach to user onboarding, training, and change management
- Administrator and super-user training to support long-term internal ownership
- Post-implementation support, maintenance, knowledge transfer, and ongoing customer support arrangements, including service desk availability, escalation procedures, and account management.

8. Questions for suppliers

- How would your proposed solution address the needs outlined above?
- Please describe relevant experience supporting NGOs, foundations, donor-funded programmes, or organisations managing grants through partners
- What assumptions or prerequisites should WWF be aware of?
- What level of configuration, customisation, or custom development would typically be required to support WWF's needs? Please distinguish between standard functionality, configuration, customisation, and custom development
- How does your solution approach document management? Please describe whether project and grant documentation would typically be stored directly within the solution, within an external document management platform such as SharePoint, or through a combination of both. Please also describe any relevant considerations related to document ownership, version control, access management, and long-term information governance
- How does your solution support workflow management, approvals, audit trails, and document handling?



- How does your solution support collaboration with external partners, including controlled access, data entry, reporting, and document sharing?
- How does your solution support reporting and dashboards?
- How would your proposed solution interact with WWF's existing technology environment, including financial systems, document management solutions, collaboration platforms, and reporting tools? Please describe relevant integration options, data extraction methods, and any advantages or limitations of different approaches. Where relevant, please indicate whether integrations are available through standard functionality, configuration, third-party connectors, or custom development
- Please describe how your solution supports role-based access control, external users and partner organisations, project-specific permissions, logging and audit trails, data protection and privacy requirements, backup arrangements, disaster recovery, and business continuity.
- What implementation timelines would typically be expected for an organisation of our size?
- Are there alternative approaches or recommendations WWF should consider?



ANNEX 2: ORGANISATION AND METHODOLOGY

Suppliers are requested to structure their RFI response according to the sections below. Responses should be concise while providing sufficient information for WWF Norway to assess the suitability of the proposed solution and the supplier's approach. Use section 7 in Annex 1 for guidance.

1. Understanding of WWF Norway's Needs

Please describe your understanding of WWF Norway's needs and objectives as outlined in Annex 1.

In particular, please comment on:

- Key challenges and opportunities identified in the current way of working;
- The areas where your solution could provide the greatest value;
- Any assumptions made regarding WWF Norway's requirements.

2. Proposed Solution

Please provide an overview of the proposed solution, including:

- Core functionality and modules;
- Data hosting locations and cloud architecture;
- Workflow and task management capabilities;
- Reporting and dashboard functionality;
- Document management capabilities;
- Integration capabilities, including available APIs, standard integrations, import/export options, and authentication approaches where relevant;
- Scalability and flexibility of the solution.

Please indicate whether the proposed solution is:

- A standard off-the-shelf product;
- A configurable platform;
- A low-code/no-code solution; or
- A custom-developed solution.

3. Alignment with WWF Norway's Requirements

Please describe how the proposed solution addresses the needs outlined in Annex 1.

Where relevant, identify:

- Functionality available through standard features;
- Functionality requiring configuration;
- Functionality requiring customisation;
- Functionality requiring custom development;
- Any requirements that are not currently supported.

4. Implementation and Support Approach

Please describe your typical approach to implementation, including:

- Key implementation phases;
- Indicative implementation timeline;
- Data migration approach;
- User onboarding and training;
- Change management support;
- Post-implementation support and maintenance arrangements, including service desk arrangements, support availability, and customer success or account management where applicable.

5. Information Security and Data Protection

Please provide information regarding:

- Information security and access control arrangements;
- Data protection and privacy compliance;
- Relevant certifications and standards;
- Data hosting arrangements;
- Business continuity and disaster recovery measures.

6. Assumptions and Recommendations

Please identify:

- Any key assumptions underlying your proposed approach;
- Any prerequisites WWF Norway should be aware of;
- Any recommendations or alternative approaches WWF Norway should consider.

7. Indicative Cost Information

Please provide an indicative five-year total cost of ownership (TCO), including, where applicable:

- Licence/subscription fees;
- Implementation and configuration;
- Development and customisation;
- Support and maintenance;
- Hosting and infrastructure;
- Training; and
- Any other significant costs.

Please clearly state any assumptions underlying the estimates provided.



ANNEX 3: RFI SUBMISSION FORM

| SUPPLIER INFORMATION | |
|----------------------|--|
| Company (legal name) | |
| Street name and no. | |
| City | |
| Postal code | |
| Country | |
| | |
| Phone no. | |
| E-mail Address | |
| Website | |
| | |
| Director (name) | |

| GENERAL COMPANY INFORMATION | |
|---|--|
| Year of establishment | |
| Number of full time employees | |
| Licensing authority | |
| Licence number (VAT no./TAX id) | |
| Countries with registered office: | |
| International quality assurance certification held by your company | |
| Local and national quality assurance certification held by your company | |
| International trade / professional organisations of which your company is a member | |
| Please indicate any relevant environmental sustainability policies, certifications, reporting frameworks, or initiatives maintained by your organisation. | |
| Does your company have a Code of Conduct? | |

| REFERENCES | | | | | |
|------------|--------|-------------------------|-------------|----------------------|-------------------|
| Client | Sector | Description of solution | Time period | Implementation scope | Reference Contact |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |

Please provide details of up to five relevant reference projects completed within the last five years using the table above. Additional supporting documentation may be attached if considered relevant.

After having read the Request for Information (RFI) No. 2026-06-01 – Digital Grant Management System for WWF Norway, dated 30.06.2026, and having examined the RFI dossier, I/we hereby submit this Request for Information and confirm that the information provided is complete and accurate to the best of my/our knowledge. On behalf of [Company Name], I hereby confirm that the company does not meet any of the exclusion criteria set out in Section A.5.



Signature and stamp:

Signed by:

The Supplier

Name of the company:

Address:

Telephone no.:

Email:

Name of contact person: