

# **T e r m s o f R e f e r e n c e**

## **Australia Awards and Alumni Engagement Program – Philippines (AAAEP-P)**

### **Development of E-business Site and M&E Portal (Phase 1 – Deployment of Content Management System and Systems Design and Functional Specifications for the E-Business Site and M&E Portal)**

February 2018

## **BACKGROUND**

The Australia Awards and Alumni Engagement Program Philippines (AAAEP-P) is a four-year program of the Department of Foreign Affairs and Trade (DFAT) that aims to support the Philippines in its effort to progress its development goals and have positive relationships with Australia that advance mutual interests. It builds on existing Australian investments in the Philippines and the gains of the Philippines-Australia Human Resource and Organisational Development Facility (PAHRODF) to deepen engagement in priority areas, broaden results, strengthen alumni links and contribute to Australia's integrated approach to development, especially economic and public diplomacy objectives.

The AAAEP-P commenced operations on 1 October 2017 following the signing of the contract for the management of the Program between DFAT and the Managing Contractor, Coffey International Development.

AAAEP-P is a high-value investment for DFAT and important for government-to-government relationships. To ensure the achievement of its goals, and to make sure that committed development results remain relevant, sustainable and delivered as planned, and that operations are managed effectively and efficiently, AAAEP-P will monitor and evaluate its implementation and delivery of results. Information generated by monitoring and evaluation activities will aid decision making by relevant internal and external stakeholders.

AAAEP is leveraging on the use of information and communication technology to ensure efficient and effective business operations to achieve its mandate. To this end, the Program will establish the AAAEP E-business and M&E portal, an interactive system that will serve as the main platform for paperless and efficient M&E related transactions with its various stakeholders. It is meant to collect information, process data, and share knowledge on AAAEP-led projects and activities.

- As an M&E tool, the portal will have a built-in system for data collection for M&E. The portal will house the centralised database of Australia Awards scholars and alumni and various support activities provided by the program.
- As a communication channel, the portal will act as a tool to raise awareness of and to promote the Australia Awards Scholarships and the Australia Alumni program in the Philippines to support its success, sustainability and visibility in the region.
- As a knowledge sharing and collaboration mechanism, it will be used as a tool for interaction and collaboration between the Australia Awards stakeholders for the sharing of expertise, knowledge and resources to strengthen the network of Australia-educated professionals in the country. The portal is also a collaborative space where registered users, depending on their level of access and permission, can contribute content and extract reports and data analytics. Registered and authorized users will have the facility to complete their own profile and exchange experiences and knowledge through blogs and discussion fora; upload

documents and links to webinars and videos; and download learning resources and reports. Publications on knowledge products harvested from various Program assistance and activities will also be showcased in the portal.

- As a business operations tool, the portal will serve as an integrated system utilising online technologies and tools to automate and manage various day to day business operations of the Program such as tendering and procurement, events coordination and management, contacts and client management, document management, and information management.

## OBJECTIVES AND SCOPE OF THE ASSIGNMENT

The overall objective of project is to implement the AAAEP e-business website and M&E Portal. This project will comprise 2 phases.

- Phase 1 cover the installation and deployment of an out-of-the-box open source Content Management System (CMS) that will serve as framework and foundation for the development of the new portal. The CMS will ensure that the temporary website that Australia Awards Scholarships is currently using remains functional and responsive to the interim needs of the Program. Prototyping, Theming, and System Analysis and Database Design of the new system will also happen in Phase 1. **This tender will only cover Phase 1.**
- Phase 2 will be the Theming, Customisation, Systems programming and applications development of the different business processes will be mapped in Phase 1. It is imperative that the applications development in Phase 2 will have the ability to interface seamlessly with the Phase 1 CMS and database framework.

Specifically, the vendor will provide the following services:

- Deployment of a running and functioning CMS, configured and installed in the AAAEP local server. The platform must use open source technology, preferably the Zope/Plone framework. This CMS should have the ability to work seamlessly with the current website of Australia Awards for easy migration of data.
- Design of the new AAAEP E-Business Site and M&E Portal to support the work of AAAEP. The design should be aligned with Australia Awards branding guidelines and should include:
  - **Inventory, Cataloguing and Assessment of current system.** Assessment of the current Australia Awards website and recommendations in terms of design, content, user experience, accessibility, web server hardware components, and hosting arrangements.
  - **Development of a high-fidelity prototype of the new system incorporating user experience best practices.** The prototype should be aligned and responsive to the different major business processes of the Program such as Management of Australia Awards Scholarships, Management of Short Courses and other ad-hoc activities, Management of Local Scholarships, Management of Alumni Engagement, Management of Monitoring and Evaluation information, Management of the Risk Management System, and Knowledge Management.
  - **Development of Templates, Themes, and Workflows of the different business processes.** This will be tested in the newly deployed CMS to ensure compatibility and integration.

- **Development of a detailed System and Functional Specifications of the new AAAEP E-Business and M&E system.** This document will be used as blueprint for the development of the new system.
- Ensuring (until the new system is fully operational) that the current Australia Awards website that the Program is temporarily using is functioning smoothly, responding to the needs of the Program, and relevant databases are updated and are structured for migration to the new system. This also includes copywriting/editing of all landing pages in the website.

Overarching design requirements of the new system:

- Attractive, user-friendly, easily maintainable, and needs minimal to zero “help desk” assistance.
- Compliant to the Web Content Accessibility Guidelines (WCAG) and branding guidelines of the Australia Awards Scholarships.
- Use of open source technology, using the latest framework with proven track record of being highly customisable, flexible and stable e.g., Zope/Plone framework that the Program is currently using.
- Multi-faceted search facility to include easy-to-use quick search and a more detailed search function that enables the user to search using several categories at the same time (eg keyword and topic, author and topic, name of scholar or participant and training attended, title of training, service providers and bids submitted, etc)
- Capability to easily create and generate segmented reports and tables for monitoring and evaluation purposes, perform simple statistical analysis, convert tables to graphs and other visualization tools
- Accessible by common browsers such as Safari, Firefox, Chrome, Internet Explorer, Opera. Website must be mobile and device friendly and work over low bandwidth connections.

### Desired portal capabilities

The AAAEP team has developed the following list of desired capabilities. Bidders will propose their preferred approach for providing a solution consisting of one or more technologies. The list represents the minimum needs for the AAAEP Portal. Bidders who propose innovative or value-added capabilities beyond the list that help deliver the expected outcomes better will be given special consideration. Note that customisation and applications development related to the capabilities below will be done in Phase 2. However, the CMS that will be deployed should be capable of handling the following specific features:

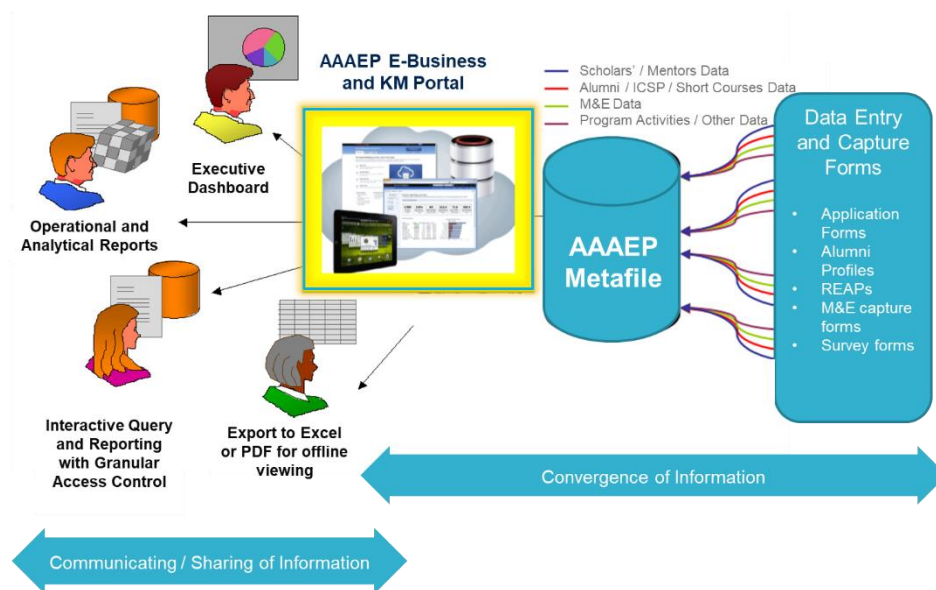
1. Content types and Functions –
  - a. create content in the form of articles, press releases, static pages, links, events calendar, discussion fora/message board, and blog posts;
  - b. embed pictures, videos, pod casts, available widgets, and other external content within the native portal content;
  - c. for native content to create in a distributed fashion through a web-based rich text editor by authorized users and approved for publication by the AAAEP team;

- d. for native content to be set to expire, gain site prominence based on popularity, and be altered without writing mark up or code; and capability to provide an option to receive email alerts when portions in the database have been modified or new content in the portal has been added.
2. Reports and Data Analytics - ability to generate reports, perform simple statistical analysis and present results in the form of tables, graphs and excel files.
3. Information Architecture and Web Accessibility Compliance - intuitive information architecture that focuses on simplicity, ease of navigation, and flexibility that considers changing priorities and needs of persons with disabilities (following the WCAG). Information architecture includes taxonomy and/or hierarchy. Navigable representations to information architecture are also available to site visitors with visual difficulties.
4. Intuitive Search - a single box search facility that indexes and returns results for contents in the website based on relevance, uploader, date uploaded and popularity. Public users will only see results in public pages, while registered users will see results based on their access control.
5. Data Security, Authentication, and Authorization - an authorization and authentication scheme allowing for multiple levels of access. The database will be immune to the 6,000 (and growing) SQL Injection vulnerabilities listed in security databases. The database will also use a binary format that cannot have user data inserted. In the portal, there will be an integrated security permissions control that handle requests whether logged-in or anonymous users can execute code and access content. Permission checks will also be done for every view or method accessed by incoming HTTP request. It will also include automatic CSRF (Cross-Site Request Forgery) and clickjacking protection, safeguarding the data from the most common forms of vulnerabilities.
6. Knowledge Management integration – The portal will allow authorized documents to be “posted” on the KM portal (following the WCAG) through systematic work flow and access controls. Authorized documents will be exposed in full text to portal search facility as well as major, public Internet search engines.
7. Polling and Surveys – The portal will provide a functionality to create various forms for the collection of monitoring and evaluation data.
8. Events calendar – The portal will have an interactive events page which encourages and supports inputs and involvement of the users. This will also include a discussion forum for logged in users, photo uploading and document storage. The schedule can also be exported into iCal or vCal format so it can be shared into outlook or google calendar.
9. Plug-in abilities – The portal will allow for easy plug-in capabilities to ensure the portal’s adaptability to technology changes in the future.
10. Web 2.0 Integration – The portal will have the capability that allow for integration to existing, public Web 2.0 functionality. For example, twitter feed aggregation, Facebook group membership, and other applicable technologies.
11. Site administrators must be able to conduct comprehensive data aggregation and ad-hoc reporting with different available display views.
12. Training and Capacity Building – There will be user training and user manuals for the AAAEP technical and functional staff to perform systems administration, content creation, and any other applicable AAAEP-specific business processes. Method for delivery and nature of training content is at the discretion of the Respondent but will be evaluated for effectiveness and innovation against other proposals.
13. Ongoing Support – There will be a skills training for the AAAEP System administrators as well as ability to receive support during Business Hours. Bidders should provide full service support to

AAAEP-P for the duration of the contract to assist in the implementation of interim arrangements regarding the current website.

14. Success Metrics and Analytics – Provide a measurable set of industry standard web statistics for indicating performance or usage of the Portal. Implement systematic or automated method for gathering web statistics and display results to public users of Portal.
15. Future Integration with Egnyte Document Management System – The CMS should be capable of integrating with AAAEP’s document management system - Egnyte. All uploaded files should be saved to the Egnyte folder and Egnyte folders and files should be accessible through the portal.
16. Additional Innovative Capabilities – Provide any additional innovative capabilities that will help the AAAEP e-business site and KM portal produce the expected outcomes.

**Figure 1. Website Design**



### Users and levels of permission

The portal must be able to assign user roles depending on their level of permissions. Registered users and what they are permitted to do in the website include:

1. MC Program Management Team - access all contents and reports
2. Representatives from DFAT - extract all or filtered contents of the alumni and scholars’ databases, generate reports and data analytics, download documents
3. Australian Alumni - edit user information, manage own profile, upload documents and blogs, participate in discussions and other related contents
4. Scholarship Applicants for AAS and ICSP - add application forms, upload application documents, participate in discussions about scholarship applications

5. Scholarship Awardees of AAS and ICSP - add and update Re-entry Action Plans, edit user information, manage own profile, upload documents, blogs, and success stories articles, participate in discussions and other related contents.
6. Mentors of Scholars - collaborate with awardees on Re-entry Action Plans, participate in discussions, manage own profile, upload documents
7. Representatives from Partner Organisations - add or edit information about their organization, collaborate with awardees on Re-entry Action Plans, participate in discussions, manage own profile, upload documents
8. Participants of short courses - add and update Re-entry Action Plans, edit user information, manage own profile, upload documents, blogs, and success stories articles, participate in discussions and other related contents.
9. Accredited Service Providers - add application for accreditation, upload bid documents, access information about implemented training programs

## DURATION

The project is expected to start on the first week of March 2018 and conclude no later than 30 May 2018.

## FEES

The total amount payable by Coffey for the provision of the Services shall not exceed up to a maximum of Php1,200,00 inclusive of tax. This amount includes communication, local transportation, supplies and materials that the provider/s will likely incur in the development of the required outputs. Coffey shall not be liable for any costs or expenditure incurred by the Contractor in excess of this amount.

## DELIVERABLES and PAYMENT SCHEDULE

The Contractor must submit the following deliverables within the designated timelines:

|                  | %Amount | Required Deliverables  | Timeline                          |
|------------------|---------|--|-----------------------------------|
| <b>Payment 1</b> | 25%     | <ul style="list-style-type: none"> <li>• Signed contract</li> <li>• Workplan to ensure current Australia Awards website is functioning and responsive to Program needs</li> </ul>  | March 2018 (1 <sup>st</sup> week) |
| <b>Payment 2</b> | 40%     | <ul style="list-style-type: none"> <li>• Assessment report on existing website and recommendations</li> <li>• A functional content management system (as stated in the capability statements)</li> <li>• High-fidelity prototype of the new AAAEP E-Business and M&amp;E Portal</li> </ul> | April 2018 (4 <sup>th</sup> week) |
| <b>Payment</b>   | 35%     | <ul style="list-style-type: none"> <li>• Detailed systems and functional specification</li> </ul>  | May 2018 (4 <sup>th</sup> week)   |

|   |  |   |       |
|---|--|---|-------|
| 3 |  | <ul style="list-style-type: none"> <li>• Templates, Themes, and Workflows of the different business processes implemented in the CMS</li> <li>• Data ready for migration</li> </ul> | week) |
|---|--|---|-------|

**DEGREE OF EXPERTISE AND QUALIFICATIONS of the TEAM**

- Must have a minimum of 5 years’ experience of in conducting information system study and systems development;
- Must have completed at least 3 related projects
- Web-based graphic design skills and demonstrated experience; UX design and implementation skills and demonstrated experience.
- Excellent knowledge of the programming language;
- High competence and experience in delivering high quality communications through a range of communication technologies and including design, publishing and public relations;
- High competence and experience in delivering high quality web-based monitoring and evaluation products;
- Extensive knowledge and experience of content management systems
- Demonstrated knowledge of semantic web, using web standards compliant XHTML and CSS
- Excellent English language skills and the capacity to be responsive to changing needs and requirements as communicated by AAAEP team