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**Annex A: Terms of Reference
Request for Proposal to deliver enhancements to UNHCR's
Operational Data Portal**

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Introduction

The Office of the United Nations High Commissioner for Refugees (UNHCR) was established by the UN General Assembly in 1950 to provide protection and assistance to refugees and other forcibly displaced people. In more than five decades, the agency has helped tens of millions of people to restart their lives. Today, UNHCR is one of the world's principal humanitarian agencies; their staff of more than 7,700 personnel is helping more than 35 million people in more than 126 countries. Staff members work in a diversity of locations and conditions including in our Geneva-based Headquarters (HQ) and more than 300 field locations. For more information, please see <http://www.unhcr.org>.

1.2 Background

The Field Information and Coordination Support Section (FICSS) in the Division of Programme Support and Management (DPSM) is the focal point in UNHCR for the collection, analysis and dissemination of operational data, and for technical support, including training, on related methodologies and activities. FICSS works towards information management solutions that provide real-time and open data, support protection principles and are interoperable with the systems of UNHCR partners.

The objective of the **Operational Data Portal** (ODP – formerly known as Operational Web Portal) is to disseminate authoritative yet fast changing operational data and information that can be used by UNHCR and its partners to manage interventions. The portal aims to improve interagency information sharing and to support UNHCR's efforts to coordinate information management.

The first phase of the project, developed as part of its Information Management Strategy 2012-2014, has been effective in enhancing the amount of reliable information available to partners and has successfully improved coordination through information sharing in several emergency operations to date. Its content is curated by Representatives and operational managers in field operations. However, the first iteration of the tool was found to be technically difficult to scale and maintain as more and more situation views were created for different operations.

Phase two of the project started in 2013 aiming to address some of the issues in version 1, by making the application more scalable and migrating all the different instances into one single robust application. The new version of the portal has been developed using Symfony 2.8 PHP framework. The improved portal needed to be flexible to meet the diversity of requirements of the different operations being supported. Because of the specificity and technical nature of its content, such a portal requires very specific customisation tools and must be managed in a decentralized way, being driven and maintained by colleagues and partners in the field.

1.3 Statement of Purpose & Objectives

UNHCR is looking for a service provider for the design and implementation of the third phase of the Operational Data Portal project.

The purpose of the current projects is to improve the ODP to deliver extended capabilities, to harmonize population information/data management for the existing solution and to improve the existing portal in terms of usability, UX/UI design, interoperability, performance and security. The service provider should be able to provide on-going support and maintenance to the existing solution to meet operational/data reporting needs; work in parallel to innovate on the existing solution by re-designing/enhancing using an agile development methodology and developing as agreed to become the future ODP application.

2 Requirements

2.1 Core requirements

UNHCR is looking to improve of the Operational Data Portal online tool for sharing operational data and information covering UNHCR operations and emergencies worldwide.

To achieve the required multi user, field targeted web-based solution; the successful bidder will be able to work with UNHCR in a highly collaborative manner, with sensitivity to the political and multi-national culture of the organization. The bidder will also be able to provide strategic input for the development of a state-of-the-art platform for the viewing and sharing of operational information, including:

- Development that reflects and enhances narrative that UNHCR is producing
- Design of the wireframes, user interfaces/experience in collaboration with UNHCR to improve and enhance the current user experience
- Development, testing and implementation of the online solution
- Installation/set-up and configuration of the online responsive solution
- Technical and functional training

Migrating the data from the existing features to the new ones.

The Operational Data Portal is hosted on Amazon Web Services.

The tool must meet the following requirements as standard:

- Software stored within UNHCR's Github repository
- Release process following software development best practices
- Compatibility with other UNHCR implemented technologies
- Well-documented code
- Built-in security, support for SSL
- Backup and disaster-recovery protocols in place
- Support for frequently used web browser and display combinations

2.2 Specifications

2.2.1 Scope

This project covers the following deliverables:

- Delivery of improvements to the Operational Data Portal
- 3rd level support for the existing features during until 31 December 2018 reported via different modalities
- Documentation and handover of the application

Not in the scope of this project:

- The supply of hardware is **out of the scope** of this RFP.
- Hosting of production and UAT environments are also **out of scope** and UNHCR's responsibility to arrange/manage it. The supplier is responsible for hosting its own development environment.

2.2.2 Objectives

The following features and enhancements need to be developed:

a) Population data administration

- Restrict the display of population groups/population figures on situation views or country views to the users with sufficient access rights
- Upon population group creation warn the user if the exact same population group already exists
- The existing global population data import needs to be extended to handle export and to be able to import with the ability to revise/modify exported figures

b) Population data widgets

- Development of 2 additional population data widgets to handle multiple data series

c) User interface

- General admin section improvements in terms of usability (easy access to content) and design, including ability to apply tags to multiple content records at the same time
- Landing page design finalization with 'At a glance' statistics automatically aggregated from situations/countries
- Provide recommendations and implement improvements to the user-experience and user-interface design throughout the site. The website needs to be easier to use and navigate both from a public-facing user perspective and for users updating and administering content and data in the admin pages.
- Enhancements for mobile/low connectivity users
- Development of in-application wizards and tooltips to guide users during specific activities in the admin section or on the frontend

d) User access rights improvements

- The current system provides access to all contents and all pages to each user assigned with an administrator role. Access needs to be tailored to the different type of users and restricted to the content and pages falling under the responsibility of the user. Type of users: country admin, situation view admin, working group admin, working group content provider, Information Management Officer, cluster IMO, HQ (bureau), partner...

- Partner content validation/approval procedure enhancement: the ODP provides the ability to choose between 2 different generic profiles for Partners: a profile which requires validation / review for any information uploaded, and another profile with a validation bypass capability, but the functionality is not finalized. One or more specific reviewers should be selected from the existing users to provide the approval (one approval is sufficient per content type). An email notification needs to be sent to the approver either on a daily basis or per item with items pending approval.
- e) 3W widget improvement: offer the ability to easily upload/import 4W data (but with downward compatibility to 3W), and visually display its content. General improvements to the backend and frontend of the widget.
- f) Development of a ReliefWeb widget to read country/situation related data through the ReliefWeb API
- g) Events widget
 - a. Develop the function to display/print documents attached to events
 - b. Ability to export multiple events to iCal
 - c. Event time zone-related improvements
- h) Global search improvements
 - Add country pages / situations to the search results when searching for a location
 - Redesign of search pane/fields to improve usability
 - String literal search in document title and contents
- i) Audience's access to content on the frontend
 - a. Printable factsheet from situation or country views
 - b. Subscription to a specific country/situation to receive notification emails when new content is available
- j) Development of an Analytics information admin section with proper user access rights (a future Analytics admin role) to pull and visualize information from the views of the Portal's Google Analytics account
- k) Interoperability
 - a. Public API development to offer data for external consumption
 - b. RSS feed development
- l) Documentation
 - Up-to-date and fully documented code
 - Up-to-date documentation for the API

2.2.3 Global style and UX considerations

The ODP application will comply with the style guidelines provided by the Field Information and Coordination Support Section.

2.3 Other services, required for the performance of the key requirements

UNHCR is seeking an experienced web software provider able to provide the following:

Software development methodology

Agile development methodology is enforced in order to deliver the highest quality software. The bidders are expected to follow Agile/Scrum methodology including regular Scrum meetings and the use of an online collaboration tool for development task prioritization, planning and tracking.

Content management and data handling

The bidders will deliver enhancements to an online application that stores and displays complex humanitarian datasets; to this extent, the ODP tool will provide bug-free and robust functionalities. The supplier is required to use an online collaboration tool for development task prioritization, planning and tracking.

Reporting

The supplier will be required to participate in weekly meetings with the focal point from UNHCR to provide an update on ongoing developments, agree on scheduling of Level 3 support activities and releases. The release schedule is flexible and should be determined by the availability of finalized application widgets or major bug fixes.

Documentation and training requirements

Once released, maintenance and support of the ODP will continue to be provided by the DPSM/Field Information and Coordination Support Section. Application architecture, data management, software and maintenance procedures will be duly documented, and handover training provided to DPSM/FICSS team members.

The Expected Role of the Bidder

The bidder is expected to give details and demonstration of the functionalities and technical requirements of the solution.

The bidder is expected to provide a Focal Point to lead collaboration with the FICSS team. Similarly, the bidder will be asked to assist the UNHCR team with the transfer of applicable functional and technical knowledge to UNHCR resources.

The bidder is also expected to give details of the skillsets to support the project including ongoing requirements from UNHCR. The bidder is requested to clearly state any assumptions of deliverables, facilities or resources they expect UNHCR to provide.

The desired provider should have:

- Relevant experience with non-profits and/or organizations with similar goals
- Relevant experience with delivering humanitarian / Refugee-specific applications
- Relevant experience in the end-to-end development of state-of-the-art web applications

- Relevant experience in Agile/Scrum project management methodologies

Risk Management

The bidder will assume a direct responsibility for risk management to the extent that project deliverables should not be imperilled. To this end, the bidder will work with UNHCR project management to ensure that risk is at all times identified in a timely manner, and managed to ensure that the project is not adversely impacted. Appropriate documentation will be maintained for UNHCR project management.

Project Kick-off meeting

The bidder will ensure core team members are either physically present or available through teleconferencing for a kick-off meeting taking place shortly after the project start at UNHCR Headquarters Geneva, Switzerland or Copenhagen, Denmark.

2.4 Customer Responsibilities

UNHCR is responsible for providing the following:

- Liaising with the Contractor, attend regular project management calls and meetings
- Assigning a focal point and liaising internally with key stakeholders
- Providing functional and technical specifications
- Reconciling reports submitted by the Contractor
- The Information Management (Global systems) team will be the main point of contact throughout the project, with other teams in UNHCR field operations or HQ introduced as needed.

3 Content of the Technical Offer

Your Technical proposal should be concisely presented and structured. In addition to the above mentioned technical requirements, the following information, and any other that you may consider relevant, should also be included:

3.1 *Company Qualifications*

A description of your company with evidence of your company's capacity to perform the services required, including:

- Company profile, year founded, registration certificate
- Provide evidence of the company's official qualifications, accreditations and certifications
- Financial statements covering the last three years
- If a multi-location company, please specify the location of the company's headquarters, and the branches that will be involved in the project work with founding dates
- A brief company history
- Experience in the business or the number of similar and successfully completed projects
- Number of similar projects underway
- Any relevant experience working with UNHCR, other UN Agencies and NGOs should be included
- Any relevant experience providing similar online or mobile applications handling humanitarian datasets
- Provide a list of the company's major clients (minimum 3), with contact information, that are similar in size and culture as UNHCR and have contracted with your company for similar project requirements. UNHCR may choose to contact them for reference purposes.

3.2 *Personnel Qualifications*

The successful bidder should have a team of developers with experience working with Amazon Web Services, Symphony 2.8 and a LAMP/LEMP stack. Project team members should be comfortable working in an agile development process and should have experience working with organizations in the social sector; experience working with geographically distributed teams; and experience understanding complex organizations.

The project team members should have relevant experience of at least 3 years pertaining to the above mentioned technologies.

The bidder should provide a list and CVs of the core staff to be assigned to this project for any technical support/set up, ongoing account management, and global payment authorization optimization support.

3.3 Vendor Registration Form

If your company is not already registered with UNHCR, please complete, sign, and submit with your Technical Proposal the Vendor Registration Form (Annex D).

3.4 Applicable General Conditions

Please indicate your acknowledgement of the UNHCR General Conditions of Contract for the Provision of Services by signing the document (Annex E) and including it in your submitted Technical Proposal.

4 Evaluation

4.1 How the selection process works

In accordance with United Nations (UN) procurement rules, an RFP process will need to be followed to select a bidder, which involves responding to the requests made in this document. The 'fit' of the proposed solution to the given requirements and the quality/completeness of these responses will be used to judge the capabilities of the bidder.

The written response is assessed by the specialist team initiating this project.

The pricing component is assessed by the procurement team. It is therefore essential that the Pricing and Written response are separate.

Each response is scored and has a weighted percentage attributed to it. In this case:

- **Technical response : 60%**
- **Financial response: 40%**

The breakdown of these points is listed in the next sections. The estimated start date for this project is **16 July 2018**.

Out of the bids received, only one bidder will be selected. The selected bidder will be asked to attend a 1-day kick-off meeting in order to present their proposed solution to the given requirements matrix and the UNHCR business scenarios (to be provided). The meeting will be organized by teleconference or physically at UNHCR Headquarters in Copenhagen.

4.2 Proposed timeline

Task	Date
RFP sent out to bidders	15 May 2018
Deadline to receive proposals	15 June 2018
Project start	16 July 2018
Kick-off meeting	16 July 2018
Application handover	2 January 2019

4.3 Evaluation of Offers

4.3.1 Submission of Bids

The procedures to be followed in preparing and submitting your proposal are defined in the covering letter for this RFP. You should carefully follow the instructions and guidelines in the covering letter in preparing your response and adhere to the established deadlines.

The RFP process is governed by UNHCR's Financial and Procurement rules and these will be strictly adhered to throughout the whole RFP process. The RFP process is managed by

the Procurement Service (PS) and any contact with UNHCR in relation to this RFP must be through the designated focal point within PS.

4.3.2 The evaluation criterion is internal to UNHCR and will not be shared with any of the Bidders, either prior to or after the final submission date. The evaluation criteria will be based on the information requested in this RFP. The **Technical offer** will be evaluated using inter alia the following criteria and percentage distribution: **60%** from the total score.

CRITERIA DESCRIPTION	Score
1. Company Qualifications (30%)	
Relevant experience in software development (20%)	20
Relevant experience in the business or the number of ongoing similar and successfully completed projects (10%)	10
2. Quality of Service (work approach and methodology) (40%)	
Understanding of requirements (30%)	30
Overall quality and clarity of proposal (10%)	10
3. Personnel qualifications (30%)	
Experience of core people who will work on the project (20%)	20
Technical support teams (10%)	10
TOTAL TECHNICAL SCORE	100

The minimum passing score is 60; if a bid does not meet this minimum, it will be deemed technically non-compliant and will not proceed to the financial evaluation.

4.3.3 Financial Evaluation

The Financial offer will use the following percentage distribution: 40% from the total score.

The maximum number of points will be allotted to the lowest price offer that is opened and compared among those invited firms. All other price offers will receive points in inverse proportion to the lowest price; e.g., $[\text{total Price Component}] \times [\text{US\$ lowest}] \div [\text{US\$ other}] = \text{points for other supplier's Price Component}$. For evaluation purposes only, the offers submitted in currency other than US Dollars will be converted into US Dollars using the United Nations rate of exchange in effect on the date the submissions are due.

Key Performance Indicators

4.4 Performance Evaluation

UNHCR expects to monitor the performance of the selected supplier according to the following KPIs:

- Delivery of commissioned work on schedule
- Quality of product and service
- The public API with sufficient endpoints and documentation is operational
- The application is running, Level 3 support is provided according to the agreed terms
- Global Search improvements have been implemented