Terms of reference (ToRs) for the procurement of services

Development of AIMS version #2

PZA 170371T-10008 '

Navision code: PZA 170371T

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0. LIST OF ABBREVIATIONS

ToRs   Terms of reference

PMO   Prime Minister Office

AIMS   Aid Information Management System

NDP   National Development Plan

1. CONTEXT

Aid Information Management System (known as: AIMS) is a web-based system designed to manage and track all information related foreign aid flow assistance in Palestine (aims.pmo.pna.ps).

AIMS is funded by the EU and implemented by Enabel in partnership with the Prime Minister Office (PMO). It offers a single system that records and processes information on AID activities to the Palestinian Government on all levels.

The early version of AIMS was developed taking into consideration all gaps in previous systems and tools used for aid coordination's, mainly the Development Assistance and Reform Platform (DARP) which was used by the Palestinian government to track foreign aid between 2012 and 2016.

During the past period, the first version of AIMS was developed and presented to stakeholder (donors, INGO, LACS team, PMO team and government agencies), and several training sessions were conducted. During this discussion, stakeholders provided positive feedback on version 1 of the system and provided important comments and recommendations for improvement. One of these recommendations is to develop an interactive and human centered portal for AIMs.

In order to enhance and maximize the benefit of the portal and ensure its continuity, effectiveness and integration with other systems, this consultancy aims to follow a human-centered design approach to develop the portal per the outlined requirements in this ToR and the documentation that will be provided by PMO and Enabel to the selected contractor. The outcome of this consultancy is a redesigned and expanded portal with a more dynamic and interactive experience, and with a better standardized system architecture and database that ensures interconnections between all its components. While preserving and advancing the portal's current functions and components, new functions shall be included as described in the following sections of this ToR.

2. TASKS TO BE PERFORMED BY THE CONTRACTOR

1. **Content Organization:** to agree with PMO and Enabel on the content on the website.
2. **Portal Design:** to develop a prototype of the new portal including the following:
   - o The prototype shall include the redesigned portal (aims.pmo.pna.ps). The contractor shall propose new enhancements to the design and user experience and include it in the prototype.

- The prototype shall include the redesign of existing components, including (but not limited to):
  - System management (Setting)
  - Government and Donor support
  - Government and Donor programme
  - Projects (ongoing and planned)
  - Planning
  - AID coordination
  - Dashboard
  - M&E
  - Reports
  - GIS
- The prototype shall include the development of new components, including:
  - Portal shared data, and Knowledge sharing tool (Site Content and organization)
  - New reports based on the request from PMO, government entities, and donors.
  - Users' management (authentication and authorization)
  - Source for documentations
  - Notification System for all users, to keep the user aware about modification when and who (the ability to force users to update a metadata field value upon check in)
  - Data flow, permissions and validations during the entry
  - API's module should be developed, for two directions (reading from other systems, and feeding other systems with data)
  - Link the portal applications where is needed with GIS module.
  - PMO could view stakeholder Profile data individually
  - Security and Privileges:
    1. The portal should have a powerful, and efficient user configuration and authentications issues.
    2. The Portal should keep track of all users' transactions and keep a log file for all user transactions application and database level.
    3. Each user should be able to login to the Portal by his/her own username and password, and the system should be enabled to use single sign on (SSO).
    4. The Portal should implement different levels of users and responsibilities.
    5. The Portal should have a powerful monitoring and reporting system (example: users logged on, user activity on the system).
    6. The Portal should have a powerful way to prevent the DBA or the programmer to see the real data.

7. AIMS allows password policy management: password complexity, password lock out, password length, password history, and password expiration.

- Reporting Module
    1. Reporting is required to be two types
    2. Predefined and designed reports, (AIMS provides a wide variety of out-of-the-box reports on system usage, Dashboard reports, Charts reports).
    3. Upon request and determined criteria (ad hoc).
- Other components per the documentation that will be provided.

3. FUNCTIONAL REQUIREMENTS:

- o Roles, Permissions and Users Management System: to create different groups of users with different permissions. To identify which user has the right to insert, edit or delete a content type.
- o Multi Language: content and interfaces on the website should be in both language Arabic and English.
- o Upload different content types such PDFs, images…etc: multiple files/image upload capability in its core thus allowing upload a specific number of files/images.
- o Filtering and Searching Content: Searching and Filtering can be easily done to ease the search of the data.
- o Web Forms / Dynamic Forms: results can be exported into Excel or other spreadsheet applications. Platform also provides some basic statistical review.
- o Backups: backup and restore of the data.
- o Security: support a wide variety of password policies such as length, complexity, or expiration.
- o Data Migration from/to Excel Sheet: ability to import and export the data from/to the Website for the first time, and also to update the imported data.
- o Warranty, Support and Maintenance

Enabel shall provide the contractor with documentation related to all the above, in order to guide the redesign and development of the enhanced portal (amis.pmo.pna.ps)

4. The contractor shall test the prototype:
    - o With PMO staff
    - o Government entities Staff
    - o Donor staff
    - o Citizens (from different backgrounds, gender, locations).
5. Based on the evaluation of the prototypes, the contractor shall make the needed modification and changes to the portal.

6. AIMS Portal shall provide the user interface in English and Arabic.
7. AIMS Portal shall provide a scalable and limited workflow/Tasks builder
8. Logs
   1. AIMS records a detailed permanent audit log of all actions performed including user and time stamp. These logs can be exported as reports as needed.
   2. AIMS has the ability to log all searches conducted in AIMS.

9. **Develop the final versions of AIMS portal in an iterative approach**
   o Conduct demos after each stage to ensure the portal is in line with stakeholders' expectations and requirements.
   o The contractor shall ensure that the portal's accessibility is compatible with mobiles and tablets.
   o The contractor shall apply the best security measures that ensure data privacy and digital safety.
   o The contractor shall ensure scalable platform

10. The contractor **shall immigrate all data exist** on the current portal, verification on data immigrated should be done by specialized staff from PMO, and relevant users.
11. The contractor shall host and coach one staff at least from PMO during the development of the portal (database, applications, CMS, and portal installation)
12. The following manuals must be provided by the contractor:
   o User manuals, for all the portal webpage, in addition to separated manuals for each application.
   o Administrator manual, including but not limited to content management, backup procedures, and users' management.
   o Technical manual, including but not limited to mobile installation and source code documentation.
   o All end user manuals should be also linked to the portal, to give the ability to back to it once needed, under help icons, classified by applications.
13. All documentation must be provided in both pdf and word format.
14. All reports and documentations must be in **English and Arabic**.

The contractor shall provide **three-year** free maintenance for the portal, starting from the final acceptance of all deliverables including: comprehensive warranty for the portal to be granted including the maintenance and technical support for the portal, mainly

1- Trouble shooting: In case site is down, any link is broken, any functionality notworking properly etc.
2- Technical Assistance in case portal needs to be moved from one server to another.
3- Remote support in changing/editing/modifying.
4- Bug fixes for any existing functionality.

15. The contractor shall provide the source code all the programming tools used in developing the portal.
16. The contractor shall submit the following deliverables: corresponding timeline is indicated in section 6:
    o Prototypes of AIMS Portal.
    o Final developed portal (aims.pmo.pna.ps).
    o User manual (online and interactive manual i.e., including some videos to lead the user how to use the system)
    o Administrator and Technical Manuals.
    o Implementation report (including findings on testing with users and changes made based on feedback, demographics on users that the prototype was tested with, etc.).
    o Training Report
17. The effort assigned for the service is the following:
    o 210 working days (WDs) to:
        ▪ Management of the process (stakeholders, feedback, demos, manuals, trainings, publish apps on stores).
        ▪ Development of portal
        ▪ Testing of portal

Certain milestones, as laid out in the table below, are to be achieved by certain dates during the contract term, and at particular locations:

Milestone	Deadline/place/person responsible
Prototype of AIMS Portal	After 2 months
Final developed portal (AIMS)	After 4months
Administrator and Technical Manuals	After 6 months
Implementation report	After 9 months
Training Report	After 9 months

Period of assignment: From 10. August.2022 Until 30. June.2023.

3. Concept

In the bid, the bidder is required to show how the objectives defined in Chapter 0 are to be achieved, if applicable under consideration of further specific method-related requirements (technical-methodological concept). In addition, the bidder must describe the project management system for service provision.

1.1 TECHNICAL-METHODOLOGICAL CONCEPT

Strategy: The bidder is required to consider the tasks to be performed with reference to the objectives of the services put out to tender (see Chapter 1). Following this, the bidder presents and justifies the strategy with which it intends to provide the services for which it is responsible (see Chapter 0).

Interpretation of the objectives in the ToRs, critical examination of tasks (1.1.1): the bidder shall provide their understanding of this assignment and the intended outcome and provide critical examination of the related tasks under this ToR, including the development and of the portal, documentation and training.

The bidder is required to present the actors relevant for the services for which it is responsible and describe the **cooperation** with them.

Strategy for establishing cooperation and then cooperating with the relevant actors (1.2.2): the bidder shall explain who the relevant stakeholders under this assignment and the measures are they will put in place to work with them to ensure all needed input are taken into account for the development of the portal and documentation under this ToR.

Development Plan (1.3.1): Description of each deliverable included in the ToR, with the suggested methodology (**waterfall management**) for the development of the AIMS portal.

The bidder is required to describe the key **processes** for the services for which it is responsible and create a schedule that describes how the services according to Chapter 0 are to be provided. In particular, the bidder is required to describe the necessary work steps and, if applicable, take account of the milestones and contributions of other actors in accordance with Chapter 0.

Presentation and explanation of the implementation plan: work steps, milestones, schedule (1.4.1): work steps, milestones, schedule; the implementation plan shall take into consideration the preparation needed, stakeholder interviews, external research, development of prototype and final portal and reports.

1.2 PROJECT MANAGEMENT OF THE CONTRACTOR

- The contractor is responsible for selecting, preparing, training and steering the experts (international and national, short and long term) assigned to perform the advisory tasks.
- The contractor manages costs and expenditures, accounting processes and invoicing in line with the requirements of Enabel.
  The contractor reports regularly to Enabel.

4. PERSONNEL CONCEPT

The bidder is required to provide personnel who are suited to filling the positions described, on the basis of their CVs (see Chapter **Error! Reference source not found.**), the range of tasks involved and the required qualifications.

Personnel assignment plan – (who, when, what work steps) incl. explanation and specification of expert days (1.6.2): per the implementation plan, the bidder shall specify the role of the four experts working on this training per the defined work steps and milestone. The bidder shall include one expert with the following working days (WDs)

The below specified qualifications represent the requirements to reach the maximum number of points.

1.3 PROJECT MANAGER

- **Qualifications**
    - Higher University Degree in IT, MIS, Software Engineering, Computer Science, or relevant fields.
    - 5 years of proven relevant experience.
    - Fluency in Arabic and English.
    - Proven experience in managing, facilitating, and completing similar projects.

Graphic Designer

- **Qualifications**:
    - University Degree Graphic Design, (Software Engineering or Computer Science with solid experience in Graphic design, , or relevant fields.
    - 5 years of proven relevant experience.
    - Fluency in Arabic and English.

Database Administrator (2)

- **Qualifications**:
  - University Degree in Design, ICT, Software Engineering, Computer Science, or relevant fields.
  - 2 years of proven relevant experience.
  - Fluency in Arabic and English.

Web Developers (4)

- **Qualifications**:
  - University Degree in Design, ICT, Software Engineering, Computer Science, or relevant fields.
  - 2 years of proven relevant experience.
  - Fluency in Arabic and English.

GIS Developer

- **Qualifications**:
  - University Degree in Design, ICT, Software Engineering, Computer Science, or relevant fields.
  - 2 years of proven relevant experience.
  - Fluency in Arabic and English.

System Administrator

- **Qualifications**:
  - University Degree in Design, ICT, Software Engineering, Computer Science, or relevant fields.
  - 2 years of proven relevant experience.
  - Fluency in Arabic and English.

Technical Writer

- **Qualifications**:
  - Higher University Degree in Design, Business, ICT, or relevant fields.
  - 5 years of proven relevant experience.
  - Fluency in Arabic and English.

Quality Assurance Engineer (2)

- **Qualifications**:
  - Higher University Degree in Design, Business, ICT, or relevant fields.
  - 5 years of proven relevant experience.
  - Fluency in Arabic and English.

5. COSTING REQUIREMENTS

1.4 ASSIGNMENT OF PERSONNEL

The 210 WDs are distributed as follows:

- Project Manager: 30 WDs for the management of the process
- Graphic Designer: 15 WDs for the design of the theme, logo, UI, etc.
- Database Administrator (2): total of 20 WDs
- Web Developers (4): total of 80 WDs
- GIS Developer: 5 WDs
- System Administrator: 25 WDs
- Technical Writer: 14 WDs
- Quality Assurance Engineer (2): total of 20 WDs