

## Annexure 1

### TERMS OF REFERENCE (ToR)

#### **APPOINTMENT OF A COMPANY SPECIALISED IN CONTENT MANAGEMENT SYSTEMS (CMS) TO MANAGE AND ENHANCE THE CMS OF THE COLLABORATIVE AFRICA BUDGET REFORM INITIATIVE (CABRI)**

##### **1. Purpose**

To appoint a company with extensive experience in Content Management Systems (CMS) and new media technologies to manage and enhance the Public Financial Management (PFM) Knowledge Hub of CABRI with the goal of driving user traffic to CABRI's PFM Knowledge Hub **from mid-May 2021 to 31 March 2024**.

##### **2. Background**

The Collaborative Africa Budget Reform Initiative (CABRI) is an intergovernmental organisation that provides a platform for peer learning and exchange for African ministries of finance, budget and planning.

The organisation is governed by three bodies: The General Assembly, the Management Committee and the Secretariat. An international agreement establishes CABRI.

CABRI has a diverse membership base, consisting of 16 countries that have formally acceded to the international agreement. CABRI currently works with around 40 African countries.

The PFM Knowledge Hub of CABRI was built with the Craft content management system. Available in three languages; English, French and Portuguese, the PFM Knowledge Hub allows CABRI to better disseminate its core knowledge products, such as, publications, blogs, and multimedia materials. Three current key knowledge products of the hub are the Budget Enquirer, the Africa Debt Monitor and since the COVID-19 pandemic, the COVID-19 Monitor. Detailed information on CABRI's knowledge products can be found on our website: <http://www.cabri-sbo.org>.

Ensuring the enhancement, further development, professionalism, user-friendliness as well as timely availability of its knowledge products with a high-quality standard and functionality is a key priority for CABRI.

The PFM Knowledge Hub is central to CABRI's communications strategy and the organisation's social media platforms, namely: Facebook, Twitter, LinkedIn, Instagram and YouTube, serve as conduits to drive user traffic to the hub and stimulate interaction and greater visibility of CABRI. In addition to creating greater synergy between the PFM Knowledge Hub and its social media platforms for enhanced user traffic, CABRI envisions to integrate additional services to the online platform, including, but not limited to a podcasts channel, interactive discussion forums and the development of an App that would be mobile-friendly and connected to its PFM Knowledge Hub where users can access unique data and PFM-related publications on their mobile phones on-the-go.

### 3. Objective

CABRI is seeking a company specialised in Content Management Systems (CMS) to: (i) update, enhance and upgrade its PFM Knowledge Hub; (ii) ensure the functionality, professionalism and user-friendliness of the PFM Knowledge Hub; (iii) provide regular maintenance of the PFM Knowledge Hub; (iv) monitor, identify and address bug fixes and other dysfunctions in a timely manner; (v) ensure timely availability of its knowledge products on the PFM Knowledge Hub; (iv) support in the design and implementation of a knowledge dissemination strategy to enhance the visibility of the organisation and the dissemination/understanding of its knowledge products to a broader audience through its social media platforms and (v) assist as needed with the development of new content on the PFM Knowledge Hub, including, but not limited to the: development of interactive discussion platforms, podcasts and mobile App to increase accessibility to and greater visibility of its knowledge products.

### 4. Tasks of the consultancy

The scope of work will cover the main tasks listed below and will span from mid-May 2021 to 31 March 2024.

Tasks	Timeframes	Estimated breakdown of hours
<b>Web Development</b> <ul style="list-style-type: none"><li>- Provide technical and design expertise to update, enhance and upgrade the PFM Knowledge Hub</li><li>- Work with CABRI on a strategic level to constantly improve the user experience</li><li>- Advise and recommend CABRI on the latest trends in CMS</li></ul>	Ad hoc	30%
<b>Debugging and maintenance of the PFM Knowledge Hub</b> <ul style="list-style-type: none"><li>- Troubleshooting and support</li><li>- Install appropriate software, module/security patches and upgrades including bug fixes, to guarantee a smooth running of the operations of the PFM Knowledge Hub</li><li>- Proactive check of the PFM Knowledge Hub to ensure that it is fully functional</li><li>- Engage with domain host, Hetzner, on behalf of CABRI, to address any maintenance issues</li></ul>	Ad hoc	10%

<p><b>Site hosting and administration</b></p> <ul style="list-style-type: none"> <li>- Guarantee a reliable hosting environment and a stable functioning of the PFM Knowledge Hub</li> <li>- Engage with domain host for troubleshooting and annual payments</li> <li>- Manage all aspects of CMS security including but not limited to, protection of Personally Identifiable Information (PII) and cybersecurity attacks</li> <li>- Ensure that a data backup is in place to restore hub data in case of data loss incident</li> </ul>	Ad hoc	10%
<p><b>Content upload</b></p> <ul style="list-style-type: none"> <li>- Timely upload of entry, landing/and or listing pages with text, documents, reports and media in English, French and Portuguese or any two that is convenient at the time of the post</li> <li>- Timely uploads to Budgets in Africa with (i) upload of approximately 100 budget documents per quarter; (ii) update the economic indicators for 54 African countries and (iii) update the existing matrixes of information accessibility for 54 African countries</li> <li>- Timely uploads to the Africa Debt Monitor and the COVID-19 PF Response Monitor and close monitoring of the knowledge product</li> </ul>	Ad hoc  Quarterly  Ad hoc	40%
<p><b>Technical support in communicating the PFM Knowledge Hub content to CABRI's stakeholders and increase web traffic</b></p> <ul style="list-style-type: none"> <li>- Design mailing templates and online applications that will increase web traffic to the PFM Knowledge Hub (in three languages)</li> <li>- Insert text provided by CABRI into mailing templates and send out campaigns after thorough testing</li> </ul>	Monthly	5%
<p><b>Project Management</b></p> <ul style="list-style-type: none"> <li>- The service provider is expected to manage the project implementation with a dedicated project manager who will ensure</li> </ul>	Ad hoc	5%

<p>that high-quality and timely service is delivered to the client</p> <ul style="list-style-type: none"> <li>- The service provider will constantly engage with the CABRI Secretariat through its Marketing and Communications Department to identify and address the needs of the client</li> <li>- Monthly meetings at CABRI offices in Centurion to review performance, develop work plans and discuss monthly project billing</li> <li>- CABRI also wishes to engage directly with individual team members</li> </ul>		
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## 5. Required Skills/Experience

The consultancy will provide a team to work with CABRI that meets the following requirements:

- At least 8 years' experience in developing Craft-based Content Management Systems (CMS) for the head developer
- At least an undergraduate degree in IT, Computer Science or related field for the head/lead developer
- At least 5 years' experience in the development and maintenance of sophisticated websites with large data volume for the development team
- Practical knowledge of separate user login sections, development of e-learning structures and the integration of existing applications (such as for document sharing) and plug-ins
- Extensive experience in using innovative technologies and applications
- Knowledge on upload scripts, allowing for timely upload of large sets of database/content at a time in the PFM Knowledge Hub is preferred
- Knowledge of App development is preferred
- Knowledge of tracking and analysing results through Google Analytics and other relevant tools
- Proactive management approach ability to respond to client's needs on an ad hoc basis with a speech turnaround
- Excellent communication skills and the capacity to be responsive to possible changing needs and requirements as communicated by the CABRI Secretariat
- Knowledge of photo and video editing software
- Excellent knowledge of English; and
- Working knowledge of French and/or Portuguese is an advantage

## 6. Contract Specifications

### Management

The assignment will be managed by the Marketing and Communications at the CABRI Secretariat.

### Place of assignment

The consultants will work from their premises but will be required to attend regular meetings at CABRI's offices in Centurion, Pretoria (South Africa) for the duration of the assignment, unless otherwise convened by both parties.

## Duration of the assignment

The present project represents 240 full working days from mid-May 2021 to 31 March 2024. The contract duration will be on an ad hoc basis, based on the hours per month required to fulfil the tasks outlined above.

## 7. Terms and Conditions

The terms of the contract will follow CABRI's rules and procedures.

The consultancy will be responsible for the settlement of all accounts, including third parties, in relation to all CABRI requests. Payment to service provider will be made monthly in arrears. The consultancy shall submit original invoices and payments will be made following prior approval of services to be performed and submission of outputs in line with milestones agreed to in the contract. Depending on the timelines and quality of the deliverables, the CABRI Secretariat reserves the right to limit the scope of or terminate the assignment at any stage.

Intellectual property and ownership of all products developed in execution of the contract will be vested in CABRI.

## 8. How to proceed

Consultancies should indicate their interest by submitting the following:

- a) A completed supplier application form
- b) A completed ownership of business form
- c) The company profile
- d) Information on previous experience of the service provider working with similar organisations and on similar projects
- e) A proposed methodology/approach, breaking down the hours proposed for the key tasks of the consultancy<sup>1</sup>
- f) The CVs of the consultancy team assigned to the project, highlighting their relevant and recent experience and qualifications
- g) A cost breakdown for the contract period of three years, containing the hourly rate and total project costs, with a breakdown between fees and expenses and indicating the number of days for each member of the consultancy team. Fees must be quoted at a rate inclusive of VAT.
- h) Electronic payment instruction form

The deadline for submitting the proposals is 14 00 hours (CAT) on Friday, 30 April, 2021. Shortlisted applications may be invited to **an online or in-person interview**.

If you do not hear back from us after two weeks of close of tender, you may consider your application unsuccessful.

## **FAILURE TO ATTACH ANY OF THE ABOVE LISTED DOCUMENTATION WILL LEAD TO IMMEDIATE DISQUALIFICATION**

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<sup>1</sup> Kindly note that a set of hours should be set aside to plan for a transition phase at the beginning and end of the project to ensure a smooth handover to a possible new service provider.

**Bidders must email their complete proposals with all required attachments to:**

[jade.naidoo@cabri-sbo.org](mailto:jade.naidoo@cabri-sbo.org)

**9.** Special conditions of the contract CABRI reserves the right not to appoint any company to undertake this project. Depending on the quality of the services rendered, the CABRI Secretariat reserves the right to limit the scope of/or terminate the agreement at any stage.

**10. Evaluation of bids All accepted shortlisted bids will be evaluated according to the following criteria:**

**0= No information      1= Poor      2= Fair      3= Good      4= Excellent**

<b>Scoring criteria</b>		<b>Weight/=100</b>
Price – Value for Money (Competitiveness of rates quoted)		25
Technical competences	Strong team (i) At least 8 years' experience in developing Craft-based Content Management Systems (CMS) for the head developer (ii) Project manager: at least 5 years' professional experience	20
	Credible and extensive experience: (i) At least 5 years' experience in the development, hosting and maintenance of sophisticated websites with large data volume (ii) Practical knowledge of creating separate user login sections, development of e-learning structures and the integration of existing applications (such as for document sharing) and plugins	20
Approach, understanding of the contract objective and scope of work	Ability to meet deadlines: Proactive project management approach with ability to respond to client's needs on an ad hoc basis with a speedy turn around	20
	Understanding of CABRI and its philosophy	5
	Overall impression of the firm, including the competency to perform the required work, creativity, reputation as well as the experience of the firm in the industry.	10