



Central User Management System and new features for Sphere Website

Call for proposals - Deadline for applications: 26th July 2019

Background

Sphere is a globally acting organisation with a network of over 100,000 practitioners and focal points in 38 countries. Established in 1997, Sphere is based on two core beliefs: that all possible steps should be taken to alleviate human suffering arising out of crisis, and that those affected by crisis have a right to life with dignity.

Sphere developed a digital strategy to explore new means to convey Sphere's messages, to develop greater capacity to put humanitarian principles into practice and to connect the community of humanitarian practitioners need to be explored. The development of several Sphere digital platforms was intended to be implemented in phases from the beginning.

In 2018, a major overhaul of the Sphere website was launched along with a new digital version of the Sphere Handbook (Interactive Handbook). For both platforms, a second phase of development to implement additional features is planned in 2019.

These Terms of Reference (ToR) seek to recruit a company to design and develop (1) further functional features of the Sphere Website and (2) a future-proof central User Management System (UMS) for the Sphere Website and Interactive Handbook.

To ensure a clear understanding of the terms used in this ToR:

- **Sphere Website:** Web-Content-Management system and web-frontend (Wordpress) presenting Sphere and a variety of contents via <https://spherestandards.org/>
- **Interactive Handbook:** Publishing platform and web-frontend (River Valley Technologies) displaying the Sphere Handbook contents via <https://handbook.spherestandards.org>
- **UMS:** central identity and access management solution (preferably stand-alone, i.e. not embedded in Sphere Website or Interactive Handbook) providing authentication and role-based authorisation of users in different Sphere applications following secure industry standards (OAuth 2.0)

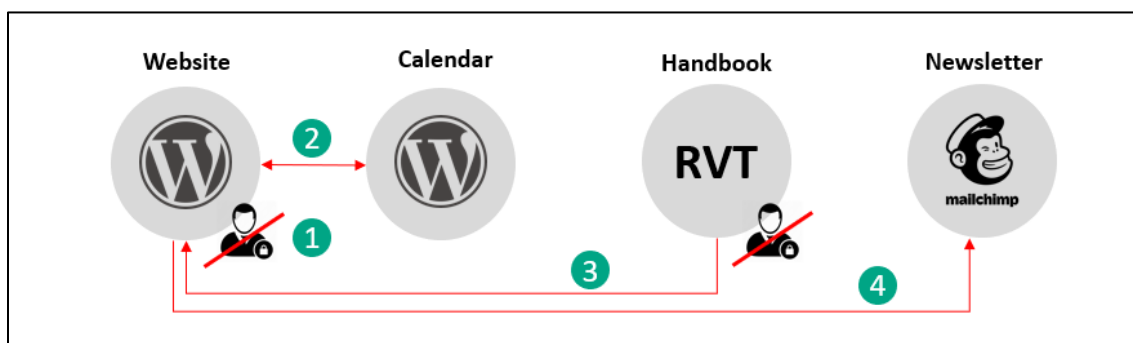
Objectives and context

The overall objectives of this assignment are:

- Provide further functionality and interactive features for registered and non-registered users on the Sphere website
- Integrate the Sphere Calendar into the Sphere website including an enhanced event data structure and links to Sphere Trainers and Focal Points.
- Provide enhanced search functionality on the Sphere website including contents from the Interactive Handbook via API (e.g. federated search)
- Provide various newsletter subscription mechanisms on the Sphere website with automated data transfer to Mailchimp
- Provide a secure and future-proof UMS granting role-based access to different Sphere platforms with a single identity (Sphere ID)
- Provide graphical and structural improvements to the user interface
- Ensure maintenance and support of the Sphere website and UMS

Current situation

Sphere has developed several platforms to communicate with the community. The Sphere Website serves as a central entry point to other Sphere applications. The following platforms are to be considered in the context of this assignment:



- **Sphere Website (spherestandards.org)**

The website presents information, news and resources on Sphere and its areas of expertise. A major overhaul was launched in 2018. The website is built with Wordpress. The theme is a custom development for Sphere. Currently, all contents are public as no login functionality is implemented yet (1).

- **Sphere Calendar (spherecalendar.org/events)**

The calendar is also built with Wordpress but is operated on a different instance than the website. Users need to have an account in order to create new events. Currently,

there is no connection to the Sphere website (2). It is envisaged to connect event data (Calendar) with Trainers and Focal Points (Website).

- **Interactive Handbook (handbook.spherestandards.org)**

The Interactive Handbook was built in 2018 with a COTS (commercial off the shelf) solution provided by River Valley Technologies. Currently, no user login functionality is implemented to allow for user comments. It is envisaged to connect the Interactive Handbook to the Website to allow for a global search on Sphere contents (3).

- **Sphere Newsletter (Mailchimp)**

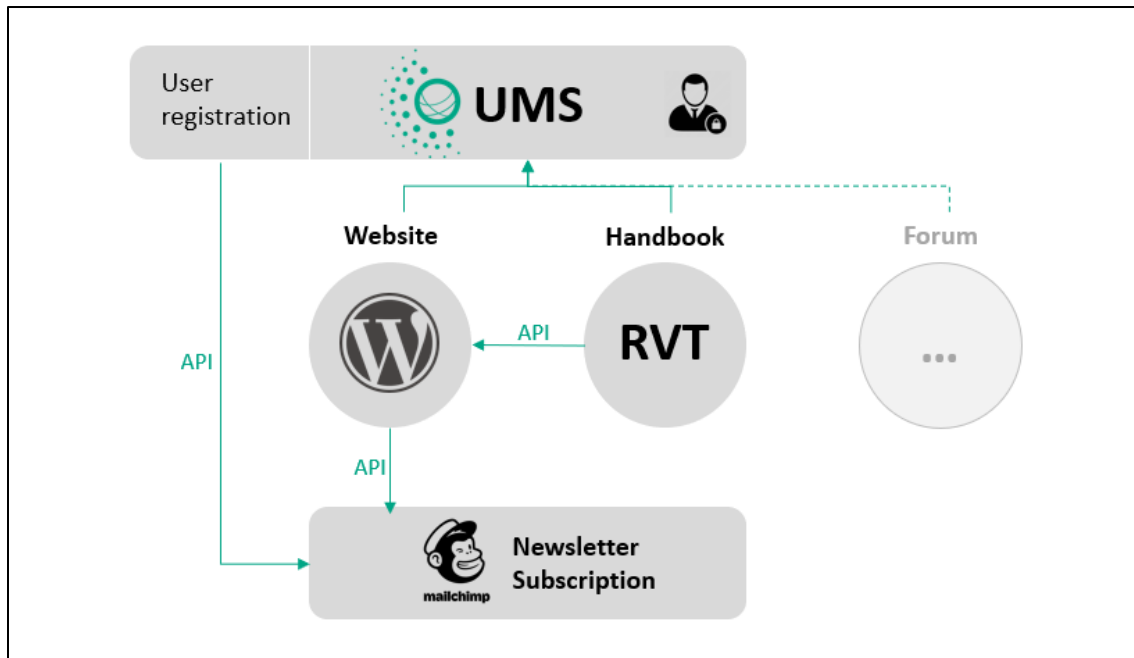
Sphere is providing monthly and special newsletters via Mailchimp. Users need to subscribe to the newsletter database via the Website being forwarded to a Mailchimp registration page. Currently, users need to retype all information after being forwarded to Mailchimp as no API connection is established yet. In addition, Sphere is seeking to promote newsletter subscriptions through pop-up messages and opt-in possibilities across the website (4).

Context of this assignment

In 2019/20, several activities are planned to further improve the Sphere digital landscape. In parallel,

- (1) the Sphere Interactive Handbook will be further developed providing user login and interactive features;
- (2) other companion standard handbooks will be included in the Interactive Handbook platform including mechanisms for co-authoring by different organisations;
- (3) a Web Content Accessibility Guidelines (WCAG) audit is performed for the Interactive Handbook and the Sphere Website providing recommendations for further UI improvements of both platforms;
- (4) as described in this ToR, further functionality and API connection to other systems (Mailchimp, Interactive Handbook) will be developed for the Sphere website
- (5) as described in this ToR, a UMS will be introduced allowing for managing user, roles and permissions across different Sphere platforms, prospectively including partner organisations (see [2]).

The envisaged target picture of a connected Sphere digital platform to be implemented by mid-2020 can be illustrated as follows:



The detailed requirements are described in Annex 1 and Annex 2.

Method and stakeholders

The transformation from the current state (as outlined in Chapter 2.1) to the target picture of a connected Sphere digital platform (as outlined in Chapter 2.2) will require the collaboration and cooperation of different stakeholders.

The bidder is expected to suggest the methodology for requirements engineering and project management ensuring the delivery of the functional scope in time. As the details for implementation of specific features and modules will be specified continuously, an agile approach is preferred.

The bidder is also expected to nominate one Single-Person-of-Contact (SPOC) to consult with key stakeholders and other external implementation partners:

- Consultation with Sphere staff
- Consultation with QA consultants (external company)
- Consultation with developers of Interactive Handbook (River Valley Technologies)
- Consultation with Mailchimp support regarding API connection (if necessary)
- Consultation with Wordpress Plugin developers (if necessary)

This assignment is planned to be implemented in two main components:

- (1) Sphere Website new features
- (2) Central UMS

Companies are encouraged to bid for the implementation of both components or only one component. Proposals for only one component should include risks and mitigation strategies deriving from the concurrent development of loosely coupled software solutions.

Scope of work

Depending on the bid for both components of this assignment or only one, the bidder's tasks are summarized as follows per component:

- The bidder shall review the functional specifications laid out in Annex 1 / Annex 2 and provide feedback on their understanding
- The bidder shall be responsible for the (technical) development and programming of the system components and is expected to lead the technical and user interface design process
- The bidder is expected to design and carry out testing/piloting of all software components
- The bidder shall support Sphere to prepare the user acceptance tests
- Detailed documentation is to be produced along the development process (English)
 - Project documentation
 - Technical design documentation
 - User manual
- The bidder is expected to work closely with Sphere staff members in order to specify requirements during the implementation process
- The bidder is expected to collaborate with the developers of the Interactive Handbook (River Valley Technologies) to (1) implement a Global Search with data from the Interactive Handbook and (2) to support the setup of Interactive Handbook user permissions as part of the UMS
- The bidder shall provide comprehensive trainings and on the job capacity enhancement to a team of selected Sphere staff in the use of the software components
- Support and maintenance for both the website and UMS is to be provided after the development phase on an as-needed basis

Technical specification

This chapter lists the main functional scope to be delivered. Details of the functional requirements to be developed under this ToR are laid out in Annex 1 and Annex 2.

Sphere Website new features

- Design and implement the Sphere Calendar with enhanced event data structure
 - Integrate existing functionality
 - Design user interface following layout and graphic branding of Sphere website
 - Adapt event data structure (additional fields)
 - Add filters (e.g. by Sphere content)
 - Add links to Sphere trainers / Focal points / Members
- Design and implement various newsletter subscription mechanisms
 - Configure API connection to Mailchimp
 - Implement subscription box in Website footer
 - Implement subscription popup after 1,5 min of browsing
 - Implement subscription popup when downloading resources (mandatory yes / no answer)
 - Add mechanism to avoid popups after successful subscription (e.g. cookies)
 - Implement subscription option in user registration form (as part of UMS functionality)
- Design and implement profile pages for Trainers / Focal points
 - Add new page to register as a Trainer (only visible to registered users)
 - Add new role for Trainers to edit own profile
 - Add functionality to edit trainer profile in the website frontend
 - Implement connection to calendar to display events connected to trainer on profile page
 - Add trainers to the map view on the Sphere website (continents and countries), improve the layout of map to better showcase trainers, focal points, and members
 - Add new role to manage profile page of a focal point/member (assign to user)
 - Design template for focal point /member profile page
 - Implement file upload to focal point profile page
 - Implement reminder, if contents are outdated on the focal point profile page (e.g. the workplan needs to be updated every year by 30. November. If the workplan is not updated, an info message should indicate, that the information is outdated)
- Implement advanced search including results from Interactive Handbook
 - Design and implement faceted search including results of Sphere website and Interactive Handbook (Bidders are free to propose different implementation

- scenarios, e.g. connection RESTful search API or integration of enterprise-search solutions)
- Implement search by source (Website content, Calendar, Trainer database, Interactive Handbook, etc.)
- Implement search by resource type (Content, Document, Learning material, Video, etc.)
- Design and implement resource uploads by users
 - Add functionality to upload resources by type and language
 - Design templates to upload resources (upload forms; currently two different types are planned: *upload document* and *tell us about a resource*)
- Further improvements (bidders are expected to include a budget of 30 days for further improvements and change requests; details will be specified on a rolling basis)
 - New restricted pages for members and board members
 - Search Engine Optimisation (SEO)
 - GDPR / Cookies consent feature
 - (...)

Central User Management System

- Design and implement UMS
 - Setup connection to Sphere Website (preferred OAuth 2.0)
 - Prepare the UMS for connection to the Interactive Handbook
- Functional requirements
 - Self-registration
 - Email verification
 - Central login
 - Password reset
 - User profile
 - Single Sign On
 - User administration
 - Managing permissions
 - Managing roles

Deliverables

- Inception report and revised project plan – including scope and methodology, visual design concept, timelines, quality assurance

- Sphere Calendar – integration in Sphere Website and adapted event data structure
- Sphere Trainer / Focal Point Profile Pages – including connection to events in calendar
- Sphere Newsletter Subscriptions – API to Mailchimp
- Sphere Federated Search – API to Interactive Handbook
- User Management System – Login to Sphere Website and Interactive Handbook
- Maintenance and update plan – for Wordpress (plugins) and user management system
- Documentation

The development phase of this assignment is expected to be completed by End of October 2019. The support and maintenance phase is planned to be one year after completion of development phase, i.e. End of October 2020.

Submission of offers

Interested companies are requested to base a proposal on this Request for Proposal. Companies or consortia are encouraged to apply. If companies or consortia bid for the development of one component only (Website Enhancements or UMS), a short description is required, how the risks of splitting this assignment will be mitigated.

The following aspects are to be included in the proposal:

- Proposed solution approach (architecture and technologies)
- Response to functional and non-functional requirements
- Initial workplan with milestones for principal deliverables
- Outline of how the bidder is going to approach the requirement specification process, project management and (agile) development process
- Proposed approach for hosting, maintenance and support (bidders are expected to outline the process after completing the development phase, i.e. process for bugfixing, support requests and maintenance work)
- Financial offer
 - Development of functional components
 - License fees (if applicable, e.g. UMS or Wordpress plugins)
 - Hosting fees (hosting fees for the Sphere website are covered by Sphere and should not be calculated in the financial offer. However, bidders should indicate the technical requirements and expected fees to host the UMS)

- Daily fee rates for maintenance & support of the Website and UMS (bidders are expected to estimate the number of days on a monthly basis, e.g. for updating software components and plugins, security patches, etc.)
- Company presentation
- CV of Single-Person-of-Contact (SPOC)
- References (similar assignments), ideally from humanitarian sector organisations.

The proposal shall demonstrate an understanding of the intent, scope and complexity of the work. Shortlisted companies will be invited to participate in an interview (either in person or via skype).

To apply

12 TH July 2019	<p>Deadline for submission of requests for clarification</p> <p>Bidders are asked to submit an "Intention to Tender" by email to recruitment@spherestandards.org until 12TH July 2019 providing a Single-Person-of-Contact (SPOC) with contact details. The responses to all requests for clarification will be sent to the SPOCs by 19 July 2019.</p> <p>Please indicate "Sphere Website – Intention to Tender" in your message.</p>
26 th July 2019	<p>Deadline for submission of proposals</p> <p>The offer must be sent via email to recruitment@spherestandards.org</p> <p>Please indicate "Sphere Website – Bidding" in your message.</p>
5 TH to 9 TH August 2019	Interviews with shortlisted companies
Mid-August 2019	Selection of bidder or bidders (for separate components)

Annex contents list

Annex 1	Key requirements for Sphere Website enhancements
Annex 2	Key requirements for the central User Management System
Web links	<p>Sphere Website – https://spherestandards.org/</p> <p>Sphere Calendar – http://spherecalendar.org/events/</p>

	<p>Interactive Handbook - https://handbook.spherestandards.org/en/sphere/#ch001</p>
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	<p>Mailchimp Newsletter Subscription - https://us4.list-manage.com/subscribe</p>
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