

Example: Terms of Reference for web development, hosting and maintenance

The South African Monitoring and Evaluation Association (SAMEA) is seeking a company to develop their website on secure open source platform; ensure the migration of the site to a new server with an assured service level as set out in an SLA, as well as web site maintenance and search engine optimization.

SAMEA strives to cultivate a vibrant community that will support, guide and strengthen the development of monitoring and evaluation (M&E) as an important discipline, profession and instrument for empowerment and accountability in South Africa. Through this it intends to promote the recognition of M&E as a profession and discipline essential to development, and practiced and used in a manner that adds significant value to effective, sustainable development in South Africa.

Objectives

- Provide a platform for interaction and information sharing among all those interested in M&E.
- Promote high quality intellectual, ethical and professional standards in M&E.
- Increase the use of M&E theory and practice.
- Promote the development and adoption of M&E approaches and methods suitable to a South African and development context.
- Promote post-graduate education and continuing professional development in the field of M&E.
- Increase the profile of South African M&E at national and international level.
- Help build understanding of international developments and trends in M&E.
- Be a resource on M&E in South Africa.

Additional information about SAMEA is available on the SAMEA web site: www.samea.org.za

The SAMEA web site is based on the following technologies:

- PHP version 4
- MySQL version 4
- Apache on a Linux server
- Server space used by web site: 2GB
- Content Management System: Custom-built

Scope of work

The scope of work includes two main areas of work:

- Continuing hosting and maintenance of the site, which would include applying security patches, clearing out log files, enlarging disk space before it runs out, sorting out security certificates and fixing bugs in the code.
- One-off development work to implement new features

The services required and activities will include:

1. Web site development:

The main activities will include:

- 1.1. Secure the existing site during the transition to the new platform; preservation of all current website content and functionality
- 1.2. Incrementally migrate the web site to a standard CMS (e.g. Wordpress, Drupal or Joomla) and implement new features that add value.
- 1.3. Use simple, cost-effective techniques to test designs with representative users before implementation of major features such as restructuring the main navigation menu.
- 1.4. Optimize the site for low bandwidth users.
- 1.5. Develop open APIs onto our membership database
- 1.6. Implement a basic "blog" function with integrated twitter and facebook posting (SAMEA current has active LinkedIn and Facebook groups; website should facilitate streaming of information between these different platforms)
- 1.7. Browser compatibility. The site must be compatible with the current versions of the following browsers (Firefox, Internet Explorer, Safari, and Chrome), as well as Internet Explorer version 6 onwards.
- 1.8. Integrate the current yahoo listserv functionality so that it can be managed via the website
- 1.9. Add a conference registration module that can be managed via the user interface as per SAMEA spec
- 1.10. Add a comprehensive search functionality to the web site

Additional tasks would include: upgrade the rich text editor control used in the web site backend to the latest version (CKEditor) and move it out of the "iframes" to stop multiple downloads of the control; improve search options on the web site and databases; and others.

2. Web site hosting:

- 2.1. The web site currently requires 2 GB, but this will increase significantly over the coming years.
- 2.2. The web site should be moved to a new server.
- 2.3. The server should support the technologies used which currently includes PHP, MySQL.

3. Web site maintenance:

- 3.1. Web site content updates: the contracted web development company will assist with content update when the changes that have to be made are not possible from the CMS user interface. It should be endeavoured that as much changes as possible be made from the CMS user interface, including the website's current functionality to add/customize and operate online voting modules etc.
- 3.2. The contracted web development company will maintain full backup of the web site through the duration of the contract. The backup, code and source files will be delivered in full to client on closing of the contract.
- 3.3. The contracted web development company will have an automated testing system that checks for broken hyperlinks on the site.

3.4 The contracted web development company will follow the terms of the standard SLA provided in the proposal.

3.5 The contracted web development company will verify regularly that the site is up and running, and will revert to the back up whenever necessary.

3.6 The contracted web development company will give guidance on using the admin interface of the CMS.

3.7 Monitor the server logs to see most popular pages and downloads and generate regular reports.

4. Web site maintenance policy:

4.1 Maintenance does not include web site redesign or development.

4.2 Documents and graphics, such as logos and images, will be provided by SAMEA.

4.3 This contract offers a service level agreement (SLA) with guaranteed server uptime and response time to queries. The company should have an automated issue management ticket system for customer requests and allow clients to access tickets via the web at any time, including the correspondence log.

4.4 The SLA will include financial penalty clauses should the company break the terms of the agreement.

5. Search Engine Optimization and site analysis

5.1 The contracted web development company will ensure the search engine optimization. The SEO work will include:

- Keyword research & analysis
- Site analysis
- Competitive analysis
- Site content optimization
- HTML code optimization
- Search Engine submission (free search engines)
- Link exchange
- Web ranking report

5.2 The contracted company will provide an annual and detailed reports analyzing progress, trends and areas to be improved. The reports should also include comprehensive and cumulative figures for downloads; as well as a competitor analysis.

6. Specific responsibilities during the transition phase:

There will be a transition phase of 2-3 months during which the current maintenance company and the new company will be working in tandem. During that period, the newly contracted web development company will be responsible for:

6.1 Getting familiar with the code, structure and functionality of the web site.

6.2 Work with SAMEA to suggest any high-priority technical tasks for the current web development company during the transition period to ensure a smooth hand-over.

6.3 Migrating and setting-up and running the web site.

SELECTION CRITERIA

The company should have:

- Proven experience of web design and support in the international development sector.
- Strong experience in developing in well known and widely used open source platforms, such as Drupal, Joomla, WordPress, etc.
- Understanding of End Users needs to match with adequate technical solutions.
- Strong track record in web site design; security and administration; Google analytics; Search Engine Optimization.
- Proactive verification by the contractor that SAMEA, as a client, is satisfied with the service provided.

SELECTION PROCESS

The proposal should (i) clearly establish an understanding of the services required and separate out activities according to the two areas of work listed above; (ii) describe how the company engages with its clients: what processes they follow and requirements they have regarding timelines, rates, requests, sign-off and payments; (iii) provide a standard SLA; and (iv) include CV of the team of (programmers and designers) assigned to the work, the timetable, and the financial proposal. The budget should be broken down by activities.

The proposals received will be evaluated according to the following criteria:

- a. Profile and experience of the company 40%
- b. Professional capacity and experience of professionals assigned 40%
- c. Accessibility and proximity of the support team 10%
- d. Pricing 10%

The deadline for submissions is XXXXXXX 2012. SAMEA's **XXX** is managing the contract. Any questions should be sent to: XXXXX

All proposals should be submitted to XXXXX. Please mention **"Website development proposal"** in the subject line.