

## Request for Proposals

### Website Design and Development Services: Knowledge Platform on Pathways to Refugee Protection

#### 1. Introduction

The University of Ottawa Refugee Hub (“Refugee Hub”) is seeking web design and development services (the “services”) for a new website that will serve as a knowledge clearinghouse for researchers and practitioners interested in pathways to refugee protection (the “subject matter”). This website will include a broad range of knowledge resources curated by the Refugee Hub, including a browsable and searchable database that must be easily updatable through regular (e.g. monthly) data extracts from a reference management program (Zotero).

The website should be built using the WordPress platform, enabling the use of off-the-shelf components (e.g. blog) and bespoke components (e.g. browsable and searchable database) as described below. The site must be developed in a manner that allows ongoing content management and updates by non-technical client-side staff, without the need for specialized web design or development expertise.

The successful bidder (the “contractor”) will have experience developing attractive and user-friendly websites with a similar range of functionality, and the demonstrated expertise and capacity necessary to deliver all project components on time and on budget.

#### 2. Objectives

The project seeks to inform research, policy and practice through knowledge exchange by developing a web facility to:

- Gather, organize and present (in an accessible and user-friendly way) a broad range of knowledge products on pathways to refugee protection;
- Be relevant and fresh through regular updates and new content; and
- Foster community and connection amongst people with an interest in this subject matter.

The website will serve a varied audience, including: academics and other researchers, policymakers, frontline workers, civil society organizations, grass-roots activists, refugee sponsors and refugee newcomers. All content will be curated by the Refugee Hub, drawing upon extensive networks and using protocols developed as part of this project.

#### 3. Client

The Refugee Hub is undertaking this project in partnership with the University of Toronto (represented by Prof. Audrey Macklin, Director, Centre for Criminology and Sociolegal Studies and Professor and Rebecca Cook Chair in Human Rights, Faculty of Law). The project will be overseen by a ‘Steering Group’ of representatives of the partners (4), which will be responsible for client-side commissioning and decisions. Vickie Knox will manage the project on the client side and will be responsible for day-to-day communication with the contractor.

In addition to the Steering Group, the project will be informed by a ‘Project Advisory Group’ made up of a range of stakeholders reflecting the varied audience of the website. The project plan will include three touch-points with the Project Advisory Group, consisting of 60-minute

‘focus groups’ to provide feedback and recommended refinements on functionality. All interactions with the Project Advisory Group will be managed by the client. A representative of the contractor may be asked to attend and/or present at meetings of the Project Advisory Group.

#### **4. Budget Range**

We invite competitive bids between CAD\$20,000 and CAD\$36,000 for the design and development of this website. These costs should be exclusive of hosting costs for the WordPress solution. The proposal should give an indication of timescales and workplan, to meet the planned launch date.

It is foreseen that the design and development of this website in WordPress will take approximately 40 to 45 person days. All proposals should provide a proper breakdown of the project in person days, including their daily cost. This should cover at minimum the following elements:

- Planning and scoping
- Design – look & feel and interface
- Setting up WordPress, including web features (see anticipated features below)
- Setting up design in WordPress site
- Building out the database, initial population with xml file and facility to make periodic updates (push or pull, see description in Annex A)
- Testing and troubleshooting
- Instructing the client on content management and updates, including to the database.

Separate from this project budget, bidders are invited to indicate daily and/or hourly rates for occasional site maintenance and updates over the next three years, estimated to be in the range of 4 days p.a. (at an additional cost to the initial development).

#### **5. Timeline & Important Deadlines**

It is anticipated that the project will be implemented according to the following timeline:

- RFP Release Date: 7 March 2022
- Response Deadline: 21 March 2022
- Vendor Selection: 30 March 2022
- Project Start: 5 April 2022
- Desired Launch Date: 29 June 2022

**Note:** This timeline is subject to revision at the client’s discretion. The successful bidder must demonstrate the capability to successfully complete the project on this timeline, but must also maintain flexibility to accommodate timeline revisions (to a later launch date) without detrimental effects to the project.

**Indicative Timeline** (to be confirmed during project initiation stage):

##### **Project Initiation (early April 2022)**

1. Project kick-off meeting
2. Project discovery: finalize objectives and requirements
3. Development and approval of detailed project plan

Result: signed-off project plan

### **Design and Build Platform (April – early May 2022)**

1. Design information architecture, wireframes, user interface design, search interface for database
2. Build web product (in WordPress) and database (including facility to populate with Zotero API)

Result: signed-off architecture, including design, navigation components and search / browse interface

### **Populate and Test (May – mid June 2022)**

1. Populate static content (e.g. site description etc.)
2. Populate curated content for homepage and sub-pages
3. Populate initial content for database via xml from Zotero
4. Test all functionality; revise and troubleshoot

Result: signed-off initial content for all areas of the site

### **Commission and Launch (late June 2022)**

1. Perform first update of database content (based on client updates in Zotero)
2. Train client representative(s) on content management and updates, including for static content, curated content and database content (xml updates)
3. Final testing of all links and functionality
4. Launch the site
5. Post-launch trouble-shooting for any technical issues that arise in the first 60 days

Result: Fully functional and thoroughly tested site that the client is able to manage and update without the need for specialized web design or development expertise.

### **Post-Launch (from July 2022)**

1. At client's option (via separate agreement): ongoing ad-hoc technical support and/or development on an agreed daily-rate or retainer

## **6. Website Features and Functionality**

The website will present, in a user-friendly and accessible way, a broad range of knowledge products on the subject matter, serving as a knowledge clearinghouse (or “knowledge hub”) for researchers and practitioners. This information will be organized into a number of sections, as described below.

A key feature of the website will be an explorable (browsable and searchable) database that contains bibliographic information and other metadata on a broad range of externally hosted knowledge products, along with external links to this content where applicable.

In addition, the site will include curated spaces highlighting new and noteworthy research in an organized and accessible way, to enable frequent users to quickly catch up on developments in the field.

The website should be built using the WordPress platform, enabling the use of off-the-shelf components (e.g. blog) and bespoke components (e.g. browsable and searchable database) as described below. The site must be developed in a manner that allows ongoing content

management and updates by the client, without the need for specialized web design or development expertise.

## 7. Anticipated Website Sections

- Homepage
- Browsible and Searchable Database
- Topic Landing Pages
- Blog
- Knowledge Summaries (literature synthesis reports; summaries of new research)
- Data Sources
- Events
- Useful Resources (Links)
- Contact Us
- About the Knowledge Hub

In addition, the site should be built in a way that permits the future addition of sections, such as:

- Researcher profiles
- Sponsor and newcomer voices
- Artistic expression

Further details on these anticipated sections is provided in Annex A below. The list of sections and the features of each will be confirmed during the project initiation phase.

## 8. Website Examples

The following websites contain features and functionality similar to the clients' vision for this site (as indicated):

- [www.climig.com](http://www.climig.com) - includes a searchable database of metadata on articles powered by Endnote (reference management tool) and built in WordPress
- <https://migrationresearch.com> - has a searchable database with bibliographic metadata (similarly structured to that to be used for this project) deriving from various data sources and APIs and a similar broad audience of academics and policy makers
- <https://globalcit.eu> – a hub of knowledge, with a range of products from data mapping to new literature to blog-type articles
- <http://www.researchinginternaldisplacement.org> – aimed at a similarly diverse audience, with knowledge products (working papers) and blogs/articles
- [www.hrlc.org.au](http://www.hrlc.org.au) - has a searchable database and is designed to help non-expert and expert human rights advocates search different categories of information
- <https://www.mipex.eu/> - complex information displayed in an effective way for a similar audience, including the individual 'policies' pages that are good hubs of topic-specific information.

## 9. Qualifications

The successful bidder will demonstrate the following qualifications and capabilities:

- Significant experience of developing multi-faceted WordPress sites, which must include significant experience working with external APIs, integrating APIs into WordPress databases, developing effective and user-friendly search and browse functionality, and undertaking bespoke development
- Integrated design and development expertise within the project team, with the ability to deliver both visual and technical elements to a high standard of quality
- Demonstrated project management excellence
- Experience working with Third Sector clients, such as universities and/or NGOs
- Relevant qualifications/certification
- Professional insurance/guarantees
- Demonstrated capability to provide ongoing ad-hoc technical support

The final selection of the successful contractor will be based on demonstrated expertise and competence, ability to deliver within the deadlines indicated and value for money.

## 10. Proposal Guidelines and Requirements

Please include the following information in your proposal:

- Project workplan, including an overview of the website build process end-to-end and a detailed breakdown of anticipated time allocation
- Detailed project budget (compliant with budget range indicated above)
- Separate from the project budget, information on costs (e.g. hourly/daily) for client-requested changes outside of initial project scope
- Description of experience in undertaking similar assignments with success (e.g. 3 – 5 top relevant projects), including who worked on each project and a link to the relevant website URL (if applicable)
- Information on team members who will be assigned: role and responsibilities, CV / qualifications, years of experience, awards/certifications. Please specifically identify any additional resources required for support (ex: sub-contractors)
- Project management approach
- References from three (3) clients of similar size or for whom a project of similar complexity was conducted

## 11. Submission Instructions

Please submit your proposal through the Refugee Hub's [Bamboo HR](#) portal by 11.59pm EDT on March 21<sup>st</sup>, 2022.

## **Annex A: Anticipated Website Sections**

### **A. Homepage**

The homepage will be generated through a combination of curated and dynamically populated content. Two key requirements for the home page are:

- Easy access to explorable database (with information on its content and use)
- New and fresh content updated on a regular basis; this should include the ability for the client to easily flag/designate content in other website sections to be featured on the homepage (e.g. “what’s new”).

Indicative homepage content items (to be confirmed):

- Statement of purpose
- Prominent link to database (with description of its purpose and content)
- Featured items (dynamic) drawn from recent additions to other website sections, e.g.:
  - Recent additions to database
  - Recent blog post(s)
  - Recent knowledge brief or research alert
  - Featured event (past or forthcoming)
- Easy navigation to other website sections

For all dynamically-generated content items, a back-end facility will enable the client to manually mark featured homepage content. If no featured item is checked, a rule (e.g., X number of most recent content-type records) will be used to select content to populate.

### **B. About the Knowledge Hub**

This section will include static content on the project and the project partners, with potential for second-level menu items as and when required.

### **C. Browsable and Searchable Database**

A key feature of the website will be a database that enables users to find and access a broad range of knowledge products related to the subject matter. The database will not house full-text versions of these resources; rather, it will provide links to external content, together with searchable bibliographic and other information about the source (metadata), such as author, title, source, date and abstract (where available). The database will also include curated keywords (“tags”) added by the client, based on a taxonomy that will be developed as part of this project. This taxonomy should be expandable and not fixed.

All database content (metadata, tags, links, etc.) will be managed and updated by the client in an open-access reference management software (Zotero). This data will be used to populate and periodically update (e.g., monthly and/or as required) the bespoke database using API feeds (i.e., an xml file that allows ‘flat’ data to be shared across different platforms and databases). It is anticipated that these API feeds will be used to update existing records in the database, and create new records and taxonomy items, based on changes that have been made by the client in Zotero.

Given that the feed from Zotero to the WordPress database will be one-way, it is not envisaged that there will be a facility to edit database records directly in WordPress (rather, all edits and changes to records will be made in Zotero), although an approval facility in WP could be

considered. As such, it is critical that the API feeds be capable of both updating existing database records with new information (e.g., new keywords, updated link) and adding new records, as well as adding new taxonomy items to the database (e.g. a new keyword or a new content type). New and existing records will be tracked using a unique alphanumeric identifier.

The client is open to either a “push” or “pull” solution for the updating of the database through API feeds. The contractor will be expected to provide expert advice and options in this regard. For bidding purposes, it is anticipated that the updates will be periodic (e.g. monthly) rather than real time. This process can include some manual steps but should be as simple and streamlined as possible.

The database will include entries for the following types of content:

Academic literature, studies and reports from a variety of sources (governments, think tanks, research centres and institutes, NGOs, intergovernmental and international organizations, etc.), knowledge briefs / policy briefs, grey literature, literature reviews and summaries, commentary, media reports, events and videos.

Users will be able to explore the database using three main functions, according to their needs. Search results will present further options for refining results:

- **Browse:** drill down through the taxonomy to clickable keywords
- **Free search box:** search the metadata (title, abstract etc.) for terms entered in the search box
- **Hybrid/guided search:** use of clickable keywords / drop-down menus, with ability to further search within the results using the search box

The site will indicate that users may not be able to access all external content, as some may be behind a paywall or in a journal that they do not have access to.

The results list page should display a list of records returned (eg, title, author/s, date, type). The user should have the ability to sort results (e.g., by date, alphabetically, relevance) and to filter or refine results (using metadata field/keywords).

The individual record page should display all metadata for the record and a link to the full content where applicable. Metadata could be clickable to allow user to explore other records with the same keywords, author etc.

#### **D. Explore by Topic: Topic Landing Pages or ‘Hub’ pages**

The CMS user (being a non-technical client-side staff-member) should be able to create landing pages, which will sit as second-level items in a 'Explore by Topic' area. There must be a facility in the content management system that allows the CMS user to create a landing page using tags from the taxonomy – for instance ‘Education Pathways’, ‘Employment Pathways’, ‘Sponsorship’ or a country, etc. The contractor will be responsible for populating several of these landing pages as part of this project (approximately 5), with additional pages to be added by the CMS user at a later date.

These landing pages will be generated through a combination of curated and dynamically populated content that is tagged with this topic.

- Indicative landing page content items (to be confirmed):
  - Static content uploaded via CMS (could be text, images and embedded video)

- Most recent additions to database tagged with this topic, with clear indicators on how to drill deeper on this/browse/explore this content
- Dynamic items drawn from recent additions to other website sections, each with a link to ‘see more content like this’ e.g.:
  - Recent blog post(s) tagged with this topic
  - Recent knowledge brief or research alert tagged with this topic
  - Featured event (past or forthcoming) tagged with this topic
  - Items in Repository of Data Sources tagged with this topic
  - Useful Links tagged with this topic

### **E. Blog**

A standard blog facility will allow a curated blog series. External contributors will be invited to contribute blog posts, which will then be posted on the site by the client. There is no requirement for a comment function. Users should be able to browse and search blog posts through an attractive and user-friendly interface.

### **F. Knowledge Summaries**

This content will be generated in-house, consisting of summaries of recent research outputs or synthesis of research on a particular theme. This content will be posted to the site either in the form of linked .pdf files (with title, caption and link to the full document appearing on the site), or using a feature with similar functionality to the blog facility and features outlined above (TBC). The contractor will populate this section initially, and the client should be able to easily update and add to it. This should include the ability for the client to add sub-headings and/or sub-pages, to group together documents in a series or on a particular theme.

Since some of this content will be chronological by year (in particular, “research alerts” summarizing new publications), and will grow in volume over time, there may be a need for functionality to disaggregate / archive this content by year so that it remains easily available but not all visible on the main section page.

### **G. Data Sources**

This section will house links to external sources of statistical data and databases on the subject. There should be static content field at page level to allow for a brief description of the data sources. The (client-side, non-technical) CMS user should be able to add new records (each being an external link), with a title for the resource, text field to add description of the resource, and the ability to tag each entry with taxonomy items such as topics and countries, etc. Website users should be able to filter by these same tags.

### **H. Useful Resources (Links)**

This section would house links to external content and resources relevant to the subject matter, including reports, databases and other relevant knowledge products from a range of sources (e.g. research institutes, governments, international organizations, civil society organizations), as well as links to active research projects, training and capacity building initiatives, etc. The client will develop a taxonomy for this section of the site as part of this project. The contractor will populate this section initially (based on the client-generated taxonomy), and the client should be able to easily update and add to it. This should include the ability for the client to add sub-headings and/or sub-pages, to tag items (e.g., topic headings) group together resources on a particular theme.

## **I. Events**

This section will be used to promote upcoming events, and provide access to materials relating to past events, including links to recordings (video or audio) and/or documents (e.g. event summaries, background documents). Access to video recordings will ordinarily be provided through links to an external platform (e.g. YouTube); the capability to include embedded video is desirable but not a critical requirement.

The section should include a clear delineation between forthcoming and past events. For each, there should be the ability to link to external content, and/or to post relevant documents. There should also be the ability to tag one or more items to be featured on the homepage. The client should have the ability to add sub-headings and/or sub-pages, to group together events in a series or events on a particular theme.

## **J. Contact Us**

This section is intended to facilitate and manage contact from site users, primarily for the purpose of suggesting or proposing content additions and contributions. As such, it should take the form of a structured contact form with a mandatory (drop-down) field relating to the reason for making contact (e.g. to suggest an article to add to the database; to propose writing a blog post).

The page should also include static content explaining the purpose of the form and providing clear signposting to external resources for people who may be seeking advice or assistance the client is unable to provide (for example with refugee protection matters).