



TERMS OF REFERENCE

Terms of Reference – Website Design, Development and Maintenance for the Outsource to the Caribbean Conference & Expo 2019

1. BACKGROUND INFORMATION

1.1. Beneficiary countries

CARIFORUM Region: Antigua and Barbuda, Bahamas, Barbados, Belize, Dominica, Dominican Republic, Grenada, Guyana, Haiti, Jamaica, St. Kitts and Nevis, Saint Lucia, St. Vincent and the Grenadines, Suriname and Trinidad and Tobago.

1.2. Contracting Authority

Caribbean Export Development Agency.

1.3. Relevant background

The Caribbean Association of Investment Promotion Agencies (CAIPA) was formed in 2004 with the objective of enabling collaboration among the CARIFORUM Investment Promotion Agencies (IPAs). The Association was officially launched in 2007 and has as its primary aim the strengthening of the region's visibility as an attractive destination for FDI, the leveraging of opportunities for joint marketing and promotions, facilitating customized training for its members and providing access to reliable information. CAIPA, as an umbrella association for regional IPAs, also seeks to foster the exchange of best practices in Investment Promotion throughout the Caribbean Region.

CAIPA's Members are the IPA and/or relevant Ministries of the following 23 Countries and Territories: Anguilla, Antigua & Barbuda, Aruba, Bahamas, Barbados, Belize, the British Virgin Islands, the Cayman Islands, Curacao, Dominica, Dominican Republic, Grenada, Guyana, Haiti, Jamaica, St. Kitts & Nevis, Montserrat, Saint Lucia, St. Vincent & the Grenadines, Saint Maarten, Suriname, Trinidad & Tobago and the Turks & Caicos Islands.

Under this framework, Caribbean Export Development Agency (Caribbean Export) acts as CAIPA's Secretariat. Caribbean Export is a regional export development and trade and investment promotion organization of the Forum of Caribbean States (CARIFORUM).

The proposed activity is being undertaken through the provision of funding assistance by the European Union in the context of the 11th European Development Fund (EDF). Caribbean Export, as the main beneficiary of the funding assistance has been charged with the implementation of a Regional Private Sector Development Programme (RPSDP) and has targeted as one of its priority areas, the continued strengthening of CAIPA to attract Foreign Direct Investment (FDI) to the Caribbean.

The overall objective of the 11th European Development Fund (EDF) Regional Private Sector Development Programme (RPSDP) is poverty reduction and the gradual integration of CARIFORUM countries into the New Global Development Strategy. The purpose is to increase the international competitiveness and innovation of the private sector firms in CARIFORUM States, by supporting improvement in the trade and business environment, deepening cooperation with the French Caribbean Outermost Regions (FCORs)/EU Overseas Countries and Territories (OCTs), institutional strengthening of Business Support Organizations (BSOs) and of the regional Investment Promotion Agencies (IPAs) and Trade Promotion Agencies (TPAs).

Under the 10th EDF, Caribbean Export in collaboration with CAIPA developed the Regional Investment Promotion Strategy (RIPS) with one of the main priority sectors for joint promotion of the Caribbean being the Outsourcing Sector. The promotion of the sector began in late 2015 and continued into 2016 with outward missions to target markets such as the UK, Mexico and the USA. In 2016, data on the outsourcing sector in the Caribbean was collected and work on defining the region's value proposition began in earnest with the development of a promotional booklet on the sector in the region, developed with funding from the Inter-American Development Bank. **The priority sectors for the Caribbean that have been identified are: Contact Centers; Finance and Accounting; Human Resources Outsourcing; Legal Process Outsourcing; and Shared Services.**

The continued promotion of the outsourcing sector is envisioned under the 11th EDF with the hosting of a promotional event in Curacao on 25 to 29 March 2019 with training sessions scheduled for 26-27 March and an Expo and Conference scheduled for 28-29 March. The hosting of the event will realize the following goals:

- Secure the participation of 300 delegates to the Conference and Expo with participation in the training sessions and Expo;
- Create an opportunity for potential investors to learn more about the investment opportunities in the Caribbean, showcasing the region's value proposition in this outsourcing sector;

- Provide an opportunity for the outsourcing sector in the Caribbean to connect with industry peers, building a network in the region that will allow for the forging of new business associations; and
- Create a platform for public and private sector dialogue on issues related to the outsourcing sector of interest to all stakeholders.

In 2017, a similar event was hosted, and a website was developed for this event. It is envisaged that the new website to be developed under this consultancy, will serve to archive the information on the website developed in 2017, showcase information for the 2019 event and host information on future events.

The site will be used by delegates interested in participating in the OCC2019 event including but not limited to: potential investors, connectors, outsourcing sector service providers including telecommunications firms, training institutions, site selection advisers and influencers, among others, interested in the proposition of the Caribbean as an Outsourcing destination.

1.4 Related programmes and other donor activities:

None.

2. OBJECTIVE, PURPOSE & EXPECTED RESULTS

2.1 Overall objective

The overall objective of the OCC2019 is to increase awareness of the Caribbean as an outsourcing destination, enhancing the Caribbean brand and attracting FDI flows to the region in this sector. The design, development and maintenance of an OCC2019 website will support the realization of this stated goal. The website will act as a tool to raise awareness and to promote the OCC2019 event and will support efforts to attract FDI into the outsourcing sector.

Progress towards this outcome is assessed in several areas, one of which is the number of FDI projects that result from activities implemented under this component. The hosting of an outsourcing event is one of the planned initiatives geared towards the securing of investors and increasing awareness of the Caribbean as an outsourcing destination. The development of the website will support the achievement of this goal.

2.2. Purpose

The specific purpose of this contract is as follows: The design, development and maintenance of the OCC 2019 website. The website will serve as a tool to raise awareness of and to promote the OCC 2019 event that will be held on 25-29 March 2019 in Curacao. It will also be used as the premier tool for visibility and communication between potential delegates and event organizers.

2.3 Results to be achieved by the Consultant

The consultant is expected to design, develop and maintain a user friendly and attractive website that will support the successful execution and hosting of an Outsource to the Caribbean Conference 2019 (OCC2019) for 300 delegates. The website must be able to archive information on past events and be used to promote future similar events.

3. ASSUMPTIONS & RISKS

3.1. Assumption underlying the project intervention

- The platform will be easy to develop and will be ready in 25 working days.

3.2. Risks

The risk is that the above-mentioned assumption is not realized and therefore the anticipated results and objectives of the project are not achieved.

4. SCOPE OF THE WORK

4.1. General

CAIPA is seeking the professional services of a website developer to design, develop and maintain a website for the hosting of the OCC 2019 event to increase the visibility of the event and serve as a communication tool between delegates and event organizers.

4.1.2. Geographical area to be covered by the Consultant.

Caribbean and international.

4.1.3. Target groups

Investment Promotion Agencies and Government agencies focused on investment promotion, Potential Investors, Existing Caribbean Outsourcing Sector Firms.

4.2 Specific activities

4.2.1 In order to realize the objectives and results, the Consultant will be specifically required to create (design, develop, test and implement) a web platform within the designated timeline which meets the following criteria:

- Interactive, appealing, highly usable and responsive web design: Web Designs are very subjective, we expect the hired company to show-case their best elements in delivering suitable design options. The design and solution must be easy to use, attractive and user friendly
- Average site load-time should be reasonable
- Search engine friendly
- Able to render appropriately on a wide variety of different browsers including mobiles;
- Be Secure: The design of the solution should adhere to security best practices for event hosting websites;
- The web solution will provide content/screen areas containing:
 - Welcome message from the host country
 - Event agenda
 - Profile pictures of delegates and their biographies
 - Ability for users to register online to participate in the event
 - Ability for delegates to pay registration fees online
 - Calendar and countdown to event clock
 - Site news/Trending now content blocks
- Archiving: The website should allow for the curating of existing content e.g. information from previous events
- Content Management: The solution should allow authorized project staff (or appointed personnel) to edit and update the website including the ability to create, remove, edit and publish content. Administrators should be able to review user registration/profile details and make adjustments;
- Site Statistics/Management Reports: The solution should provide authorized users with a number of relevant reports, for example user registration, site usage, key interests/topics being discussed within the collaborative spaces and other relevant statistical data;
- Document Management System (DMS): Document upload (any file format including videos);
- Search: The solution should provide users with the ability to search for and locate content based on keywords and key phrases. Search should not be limited to articles, pages or other forms of content-administrator created posts access control methods;
- Survey & Poll: The site should allow for the conducting of surveys of around 10

- to 20 questions and a Polling / voting system should also be available;
- Find a Member feature and Community/Group Member listing: The solution should allow users to find Outsourcing sector group members based on some relevant search criteria. The Administrators should be able to view and manage the list of members registered.
 - Payment for Registration Fees: The website should allow for the payment of registration fees using a credit card – this solution will be provided by an independent service provider, however, the website must be compatible with their requirements.
 - Public Users and Members Electronic Document Catalogue: Users should be allowed to search for, view and/or download articles and documents;
 - Users should also be able to assign star ratings on articles, videos and other informational content;
 - Allow for Social Network Integration;
 - Mass Email/Messaging: The system should provide a feature to allow authorized content administrators (or other authorized administrators) to contact all or group/community members. This feature may be used to facilitate the dissemination of newsletters and Email Notifications;
 - Tagging/folksonomy: Users should be able to provide user-generated tags and descriptions of content being added;
 - System maintenance: Ensure that the website is functional/operational for the duration of the project; and
 - Spam Control: The solution should provide an automated challenge system that reduces the number of spam comments/posts that either need moderation or slip through filtering mechanisms.

4.3 Project management

4.3.1. Responsible body

The Caribbean Export Development Agency will be responsible for the management and coordination of this project.

4.3.2. Management structure

The Manager, Competitiveness and Innovation will retain overall responsibility for the project and will report the performance of the project to the Executive Director. Day-to-day supervision of the activities of the project is the responsibility of the Senior Advisor for Investment Promotions (based in the Dominican Republic).

4.3.3. Facilities to be provided by the Contracting Authority and/or other parties

Not applicable.

5. LOGISTICS AND TIMING

5.1. Location

The CARIFORUM region.

5.2. Commencement Date & Period of implementation of tasks

The intended commencement date is **29 August 2018. The project will end on 28 September 2018.** Extensions may be agreed upon by both parties, if applicable.

6. REQUIREMENTS

6.1. Personnel

6.1.1. Key expert

All experts who have a crucial role in implementing the contract are referred to as key experts. The profiles of the experts for this contract are as follows:

Qualifications, Skills and General Professional Experience

- Certification as a Web Developer
- Certification in Information System Management (ISM) or Computer Science from a recognized institution or equivalent qualification;
- Certification in Project Management
- Server Security Certification and/or demonstrated experience in ensuring server security
- At least three (3) years post-qualification experience;
- In-depth knowledge of current web design trends and techniques;
- Demonstrated experience in ICT planning and IS analysis and design;
- Demonstrated knowledge or use of any of the following; Microsoft SQL Server 2008, MySQL, PostgreSQL;
- Good understanding of key database concepts as applicable to application architecture;
- Proven experience in working in a participatory and consultative environment;
- Analytical skills, particularly the ability to conduct research and prepare appropriate findings and conclusions.

Quotations should provide details on qualifications and experience but also on the below as indicated:

- Company Profile (Board of Directors, Office location(s); key staff to be involved

- in website development and their relevant experience etc.);
- Proposed Methodology / Approach and detailed Timeline with Deliverables;
- Proposed Technology (with justification) - please highlight the pros & cons of the technology proposed;
- Team Strength (who will work on this project);
- Detailed Cost Break-down (Design, Programming, AMC*, SSL Certificate, Security Audit, Hosting* (* with recurring charges. Example: 1st Year and for next 2 to 5), Maintenance;
- Details of SEO strategy and training of Project Personnel in how to go about creating and managing content;
- Analytics and website monitoring report capabilities;
- Sample(s) of similar work-done (please list active web address);
- Hosting Service (if you provide such services) (optional).

Once a contract has been signed, within 5 working days, a mock-up of the proposed website (using publisher or PowerPoint) should be presented to the Caribbean Export Team.

6.1.2. Other experts, support staff & backstopping

Only one key expert will be required for this contract.

6.2. Office accommodation

No office accommodation at the Caribbean Export Development Agency is required for the key expert.

6.3. Facilities to be provided by the Consultant

The Consultant shall ensure that additional experts, if required, are adequately supported and equipped. In particular, the Consultant shall ensure that there is sufficient administrative, secretarial and general support for each additional expert to enable the Consultant to concentrate on his/her primary responsibilities. The Consultant must also transfer funds as necessary to support the activities under the contract and to ensure that all employees are paid regularly and in a timely fashion.

6.4. Equipment

No equipment is to be purchased on behalf of the Contracting Authority/beneficiary countries as part of this service contract or transferred to the Contracting Authority/beneficiary countries at the end of this contract. Any equipment related to this contract which is to be acquired by the Contracting Authority/beneficiary countries must be purchased by means of a separate supply tender procedure.

7. REPORTS

7.1. Reporting requirements

The consultant will submit the following deliverables:

- Inception Report/Report 1 with a mock-up of the proposed website (using publisher or PowerPoint), by **6 September 2018**;
- Report 2/Final Report with the active website, as well as a website management handbook, recommendations on sustainability including hosting and maintenance by **28 September 2018**.

7.2. Submission & approval of deliverables

The deliverables referred to above must be submitted to the Senior Advisor, Investment Promotions. All reports must be submitted in English. The Senior Advisor, Investment Promotions is responsible for approving all deliverables.

8. PAYMENT TERMS

- An initial payment of 20% of the project cost will be made upon delivery and acceptance of Report 1; and
- A final payment of 80% of project cost will be made upon delivery and acceptance of the final website and Report 4.

9. MONITORING AND EVALUATION

9.1. Definition of indicators

Performance on the project will be measured by timely submission of the deliverables outlined in Section 4.2 and as outlined within the work plan, as well as by the acceptance and approval of the Contracting Authority. Feedback on each submitted Report is not a requirement for the continuation of the project. The Contracting Authority will provide feedback to the consultant **within five (5) working days of receipt** of the final report.

9.2. Special requirements

None.