Invitation to tender

To upgrade the weADAPT platform
CMS to Drupal 9

Stockholm 2021-07-16

This invitation to tender (ITT) invites qualified information technology solution providers to submit proposals to upgrade the current content management system of the weADAPT climate change adaptation platform to Drupal 9 (from Drupal 7), and to improve some of its functionality in the process.

We look forward to receiving your proposal.

Sukaina Bharwani
weADAPT Strategic and Technical Development Lead
sukaina.bharwani@sei.org

Stockholm Environment Institute
Oxford Eco Centre
Roger House
Osney Mead
Oxford
OX2 0ES
UK
Table of contents

1. Administrative conditions ........................................................................................................ 4
2. Tender regulations ......................................................................................................................... 5
   2.1 Obligatory requirements ............................................................................................................. 5
   2.2 Questions and answers regarding the tender .............................................................................. 5
   2.3 Correction of errors and clarifications and supplementation of tenders .................................. 5
   2.4 Rights reserved ......................................................................................................................... 5
   2.5 Notice of award ......................................................................................................................... 5
3. General tender conditions ............................................................................................................ 6
4. Requirements regarding the tenderer ............................................................................................ 6
   Tenderer’s Technical and Professional Capacity ........................................................................... 7
5. Tender price .................................................................................................................................... 7
6. Terms of reference ......................................................................................................................... 8
7. Evaluation ........................................................................................................................................ 8
   7.1 Evaluation criteria for technical and professional requirements .................................................. 9
   7.1.1 Method for implementation (maximum 60 points) ................................................................ 9
   7.1.2 Qualifications and competence (maximum 40 points) ............................................................ 9
   7.2 Evaluation of technical and professional requirements ............................................................. 10
   7.3 Price /quality evaluation .......................................................................................................... 11
Terms of reference .......................................................................................................................... 12
1. Introduction .................................................................................................................................... 12
2. Objective ......................................................................................................................................... 13
3. Scope................................................................................................................................. 15
4. Approach and methodology ......................................................................................... 20
5. Reporting and communication....................................................................................... 20
6. Schedule.......................................................................................................................... 20
Contact information of tenderer......................................................................................... 21
1. Administrative conditions

Contracting authority: Stockholm Environment Institute (SEI)
Postal address: Box 24218, SE-104 51 Stockholm, Sweden
Corporate ID no: 802014-0763

Contact Person regarding the tender process: Sukaina Bharwani

Submission of tender in the digital procurement tool TendSign.

Last date & time to submit tender: Sunday 15 August 2021 at 14.00hrs CET

Procurement type: Simplified procedure in accordance with the Swedish Public Procurement Act (2016:1145), Chapter 19 Section 5

Tenders may be accepted without prior negotiations. Negotiations, if any, can only be commenced at the initiative of SEI.

<table>
<thead>
<tr>
<th>Timetable</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Invitation to tender published</td>
<td>16 July 2021</td>
</tr>
<tr>
<td>Last date for submission of questions</td>
<td>8 Aug 2021</td>
</tr>
<tr>
<td>SEI response to tenderers’ questions</td>
<td>11 August 2021</td>
</tr>
<tr>
<td>Last date for submission of tenders</td>
<td>15 August 2021 at 14.00hrs CET</td>
</tr>
<tr>
<td>Preliminary dates for presentation of the method of implementation</td>
<td>13 September 2021</td>
</tr>
<tr>
<td>Anticipated notice of award</td>
<td>27 September 2021</td>
</tr>
<tr>
<td>Anticipated date for start up meeting</td>
<td>29 September 2021</td>
</tr>
<tr>
<td>Anticipated assignment start date</td>
<td>4 October 2021</td>
</tr>
<tr>
<td>Anticipated launch date</td>
<td>1 December 2021</td>
</tr>
</tbody>
</table>
2. Tender regulations

2.1 Obligatory requirements
This Invitation to Tender, including Appendixes, contains a number of compulsory requirements, which are so designated by the word must and are underlined. In order for a tender to be examined, evaluated and adopted these must requirements have to be satisfied.

2.2 Questions and answers regarding the tender
During the procurement process, the contracting authority (Stockholm Environment Institute) is not permitted to discuss documentation, tenders, evaluation or other such matters with tenderers in a manner which favours or disfavours one or more tenderers. Questions regarding contract documents must be submitted in TendSign no later than 8 August 2021. The answers to all questions will be published in TendSign. SEI may at any point in the process seek to question a tenderer, in writing or verbally, for the purpose of clarifying information pertaining to the tenderer and/or their proposal.

2.3 Correction of errors and clarifications and supplementation of tenders
Responses by tenderers to requests by SEI for corrections of errors, clarifications or supplementation of tenders must be submitted in writing to the contact person indicated above.

2.4 Rights reserved
In addition to all other rights, SEI specifically reserves the right to:
• Accept or reject all or part of a tenderer’s tender
• Negotiate further terms and other conditions of business with the successful tenderer
• Contact any tenderer(s) to obtain corrections or clarifications to a submitted tender if necessary to make a fair comparison of all tenders submitted
• Extend the tender submission date, for all tenderers, if it is determined to be necessary for any reason
• Amend or supplement this Invitation to Tender in writing at any time
• With reservations for misprints or typos
• Withdraw the tender at any time

All information regarding the tender, including amendments and supplements, will be published in TendSign.

2.5 Notice of award
All tenderers will be notified of the winning tender as soon as possible after a decision has been made to award the contract. A notice of award does not mean that a binding contract has been entered into between SEI and the winning tenderer. A contract is not legally binding until it has been signed by both parties.
3. General tender conditions

1. Tenders must be prepared based on the conditions indicated in this Invitation to Tender with all its appendixes, and satisfy the listed must requirements.

2. Tenders must be in writing and signed by an authorised official of the tenderer.

3. Tenders must contain information about the tenderer pursuant to Appendix 2, Contact information, which is appended hereto.

4. The tender and all documentation appended must be drawn up in English and contain the information and documents indicated in this Invitation to Tender.

5. The tender must be submitted as one single PDF file (including possible annexes and certificates), in case of valid technical reasons a tender may be submitted as multiple PDF files.

6. The tender must be submitted via TendSign marked “Tender for Drupal 9 upgrade of weADAPT” in the subject line.

7. Tenderers, in their tender, must confirm that the tender is valid and binding upon them for 60 (sixty) days from 15 August 2021.

The proposal must include:

- A statement of interest outlining how the team is qualified to perform the task.
- A design and implementation plan, clearly outlining how the terms of reference (Annex 1) will be addressed, as well as an explanation of how the chosen approach will meet the objectives of the evaluation.
- A work plan with timeline and budget (incl. breakdown of costs and full costs for travel).
- CVs of all team members, followed by a summary which clearly states relevant experience for the assignment.
- At least two examples of similar previous assignments within the past three years, including reference(s) for each assignment.

4. Requirements regarding the tenderer

The following requirements must be satisfied:

The tenderer must fulfil the required legal obligations regarding registration, taxation and other legal charges in Sweden or in the tenderer’s home country.

The tenderer and/or individuals representing the tenderer must not have been found guilty of any crime related to the exercise of his/her profession, nor be or be about to; (i) enter into an arrangement for the benefit of creditors, (ii) become insolvent, (iii) file for protection under the bankruptcy laws or otherwise seek relief from creditors or (iv) anything analogous to the matters stated herein before that occur under any applicable law. Furthermore, the tenderer
and/or individuals representing the tenderer must not have been convicted of trafficking in persons, procurement of commercial sex, use of forced labour, a narcotic offense or to have been engaged in drug trafficking or other serious criminal offenses. Tenderers to whom circumstances as the hereinbefore described apply will be excluded from participation in this tender.

A tenderer must append the following documents in a copy to its tender as evidence that the requirements have been satisfied:

- A copy of the registration certificate issued by the authorized government agency (in Sweden, this is the Swedish Companies Registration Office, Bolagsverket), provided that an obligation to register exists.
- A certificate showing that the tenderer is registered for the payment of value added tax, withholding tax, employee contributions, or similar taxes or charges in accordance with the law of the country of the tenderer, and is free from debts regarding taxes and social security contributions.

Tenderer’s Technical and Professional Capacity

The work- and time plan must meet the requirements of the implementation to be concluded by 31 December 2021, with a first version online by 15 November 2021 and launched on 1 December 2021. Work is expected to commence no later than 4 October 2021.

The tender must include a description in the form of a Curriculum Vitae (CV) for the proposed persons. The CV must contain a full description of the person’s theoretical qualifications, professional work experience, language skills and include a list of publications and/or written work.

For other requirements regarding the Tenderer’s Technical and Professional Capacity please refer to Appendix 1.

5. Tender price

- Fees and costs must be given in Swedish Crowns (SEK), excluding VAT.
- The total price, excluding VAT, in the tender must not exceed a maximum total cost of SEK 900 000 (SEK nine hundred thousand).
- The tender must include any and all costs for the assignment and state the total cost of the assignment, and be specified as:
  - fee per day and person and in total
  - travel and all travel associated costs, including accommodation and per diem compensations
  - other costs (specified)

The total price for the assignment will be used in the evaluation of the economically most advantageous tender.
6. Terms of reference

The Terms of Reference (Appendix 1) indicate fundamental and specific requirements for the performance of the assignment.

The tender must describe how the assignment would be carried out and what competencies would be made available to the assignment in such detail as to enable an assessment against the Terms of Reference and section 7 Evaluation below.

The tender must contain an acknowledgement that the tenderer has the technical, financial and other knowledge requirements for performing the assignment, as stated in this Invitation to Tender, within the timeframes specified.

7. Evaluation

A selected group will evaluate the tenders. They will evaluate according to the below. Tenderers should ensure that they have included clear and relevant information in their tender as to enable the evaluation.

Tenders that fail to adequately satisfy the Terms of Reference and conditions specified in this document may be arbitrarily dismissed. The total price for the assignment will be used in the evaluation of the economically most advantageous tender.

Tenders that fulfil the requirements will be evaluated at the sole discretion of SEI. The evaluation will involve an analysis of the complete tender including, but not limited to the following evaluation principles and process.

The tenders will be evaluated following Step 1-3 below:

Step 1. Obligatory requirements
Initially, an examination will be made of the must requirements (see sections 1 to 6). Tenders that satisfy these requirements and are deemed to be qualified will then be evaluated against a set of basic technical and professional requirements.

Step 2. Full evaluation
Tenders that are deemed to satisfy the basic technical and professional requirements will be evaluated against a set of weighted criteria as set forth below in section 7.1 – 7.2. The results of the technical and professional evaluation will thereafter be used for a price /quality evaluation as set forth in section 7.3.

Step 3. Presentation of Method for implementation
The two (2) tenders having received the lowest comparison value will be invited to a presentation of the Method for implementation. Evaluation of the presentation will follow the same evaluation criteria as stated in section 7.1.

The winning tender is the one with the highest score from the presentation.
7.1 Evaluation criteria for technical and professional requirements

7.1.1 Method for implementation (maximum 60 points)

The tender, based on the requirements in the Terms of Reference, must include the design, development and implementation of the upgraded weADAPT platform. The following criteria will be assessed:

**Website design, development and implementation**

Whether consultants have understood the assignment by designing an upgrade that clearly shows how it will meet the stated objectives in an effective and structured manner. (25 points)

- Clarity of solution
- Solution of SEO services
- Content migration proposal

Whether the chosen approach and method will generate specific impacts (KPIs) in strengthening the weADAPT platform. (25 points)

- Relevance of proposal to weADAPT’s vision and website strategy
- Proposed functionalities highlighting pros and cons
- Demonstration of the ways in which the proposed approach will impact the different KPIs

Whether the planned design is clear, efficient and flexible in relation to the Terms of Reference. (10 points)

- Responsiveness to the requirements
- Implementation and launch plan
- Post-launch support and maintenance

7.1.2 Qualifications and competence (maximum 40 points)

The tender must contain information regarding the qualifications and competence of the persons proposed. The key requirement at the bidding phase is to demonstrate quality and experience in the proposed team, in relation to the Terms of Reference.

**Team leader (maximum 20 points)**

- Experience from leading and/or managing projects concerned with website development. (12 points)
- Experience working with international organisations, to create visibility through online platforms and communities of research and practice. (8 points)

**Technical personnel (maximum 20 points)**

- Experience of similar assignments, e.g., upgrades of other websites to Drupal 9 and improved design and functionality achieved at the same time. (10 points)
• Experience working on complex websites with multiple layers of complexity e.g., weADAPT interacting themes, networks and external microsites (10 points)

Summary table of Evaluation criteria

<table>
<thead>
<tr>
<th>Evaluation criteria</th>
<th>Max score</th>
</tr>
</thead>
<tbody>
<tr>
<td>7.1.1 Method for implementation</td>
<td></td>
</tr>
<tr>
<td>▪ Whether consultants have understood the assignment by designing an approach that clearly shows how it will meet the stated objective in an effective and structured manner. (25 points)</td>
<td>60</td>
</tr>
<tr>
<td>▪ Whether the chosen approach demonstrates specific ideas for strengthening the platform and achieving its KPIs. (25 points)</td>
<td></td>
</tr>
<tr>
<td>▪ Whether the work plan for the assignment is clear, efficient and flexible in relation to the Terms of Reference. (10 points)</td>
<td></td>
</tr>
<tr>
<td>7.1.3 Qualifications and competence</td>
<td></td>
</tr>
<tr>
<td>▪ Team leader (20 points)</td>
<td>40</td>
</tr>
<tr>
<td>▪ Other personnel (20 points)</td>
<td></td>
</tr>
<tr>
<td><strong>Total maximum score:</strong></td>
<td><strong>100</strong></td>
</tr>
</tbody>
</table>

7.2 Evaluation of technical and professional requirements

Method of evaluation

<table>
<thead>
<tr>
<th>The number of points that can be awarded under each of the evaluation criteria in section 7.1.</th>
<th>Poor (^1)</th>
<th>Not entirely satisfactory (^2)</th>
<th>Satisfactory (^3)</th>
<th>Good (^4)</th>
<th>Very Good (^5)</th>
<th>0%</th>
<th>40%</th>
<th>60%</th>
<th>80%</th>
<th>100%</th>
</tr>
</thead>
<tbody>
<tr>
<td>For example, if a maximum of 20 points can be awarded for a given criteria, “Good” will mean 0.8 x 20 = 16 points. (In the evaluation, the levels (in %) will have fixed values, which means that there will be no intermediate values).</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

\(^1\) Not addressed or not sufficient  
\(^2\) Sufficient in some aspects but not as a whole  
\(^3\) Sufficient but lacks substantial advantages or has uneven quality  
\(^4\) Adequate and well suited to the purpose  
\(^5\) Gives added value and shows high quality on the whole
7.3 Price /quality evaluation

The results of the evaluation are used to price quality by allocating tenders a percentage surcharge on the price, where the surcharge is a function of how much lower the tender’s quality score is than the maximum quality score. This method yields a comparison value for every tender.

*The following formula is used:*  
Comparison value = Tendered price x (1 + Percentage surcharge).

Percentage surcharge = [(maximum quality score – quality score assigned)/maximum quality score] x upward adjustment factor.

The upward adjustment factor reflects the effect the quality offered should have when added to the price in an evaluation. The higher the upward adjustment factor is, the greater the importance accorded to qualitative criteria in relation to the price.

The upward adjustment factor is set at 2.5 for this procurement.

*Example:*  
The upward adjustment factor is set at 2.5.  
Tender A: Price 480,000, quality score assigned 90 of 100.  
Tender B: Price 400,000, quality score assigned 75 of 100.  
Evaluation Tender A: Percentage surcharge = (100 – 90) / 100 x 2.5; Percentage increase = 0.25;  
Comparison value = 480 000 x (1 + 0.25); Comparison value = 600,000.  
Evaluation Tender B: Percentage surcharge = (100 – 75) / 100 x 2.5; Percentage increase = 0.625;  
Comparison value = 400 000 x (1 + 0.625); Comparison value = 650,000.  
The winning tender is A, since it has the lowest comparison value.
Terms of reference

Drupal upgrade of the weADAPT platform

1. Introduction

The Stockholm Environment Institute (SEI) is an international non-profit research organization that has worked with environment and development issues from local to global policy levels since 1989. SEI works to shift policy and practice towards sustainability.

SEI’s current strategy for the period 2020-2024 has been designed to address key challenges in sustainable development, empower and inform partners, and to deliver a marked contribution to the changes needed in how human society governs and interacts with the environment. The strategy drives the institute’s research direction, policy engagement and capacity development, and advances its enabling functions.¹

SEI manages one of the world’s leading and longest-running global online climate adaptation knowledge platforms, weADAPT. Established in 2007, weADAPT’s vision is to provide a collaborative online, open space for researchers, planners, practitioners, students and policymakers to share and access credible, high-quality information on climate change adaptation and related areas (including the synergies between adaptation and mitigation) and to learn from and connect with one another. Designed to facilitate learning, exchange, collaboration and knowledge integration, it hosts a fast-growing professional community of research and practice while developing policy-relevant tools and guidance for adaptation planning and decision-making.

The platform receives over 100,000 unique users each year and, to date, has over 6000 registered users from more than 2500 organisations, typically INGOs, NGOs, think tanks, government ministries, national hydrometeorological services, universities and research institutes, civil society organisations, social enterprises, private sector businesses and grassroots charities. weADAPT is regularly used in university and professional training courses and has launched a new theme with Climate Adaptation Training resources. The platform has approximately 2000 articles (with PDFs) and 1000 case studies (with PDFs).

¹ To learn more about SEI’s current strategy, please read here: https://www.sei.org/strategy/2020-24/
2. Objective
Use of the latest technological advances and improvements is essential in maintaining SEI's state-of-the-art climate change adaptation knowledge management platform. The upgrade will enable SEI to deliver even better and more efficient services to weADAPT's users and partners alike. As such, a well-planned and designed implementation process is required that provides the least disruption to existing users.

The underlying content management system (CMS) of weADAPT, Drupal 7, is now reaching the 'end of life' and will no longer be supported technically. A major upgrade will be required before the end of December 2021. As a part of SEI's role as a leading knowledge broker in the field of climate change adaptation, SEI now invites proposals from external consultants to upgrade the current CMS from Drupal 7 to Drupal 9 and to make some improvements to the platform at the same time.

Based on weADAPT’s vision the objective for upgrading the platform is to act on recommendations from a recent survey on how to improve the user experience and how weADAPT supports users in their climate change adaptation work. This includes improving the responsiveness of the platform in offering relevant and inspiring experiences and lessons learned, increasing opportunities to share this content and connect with others, whilst delivering measurable impact for weADAPT and its members. The upgraded website will provide a platform that enhances the user experience and increase opportunities for users to learn, share and connect with each other.

Overarching platform strategy
The goal of weADAPT is to accelerate learning, sharing and connecting on climate change adaptation issues for users around the world and especially for those in ‘hard-to-reach’ (low-bandwidth) areas. The goal of the upgrade is to do all of this, whilst keeping weADAPT at the forefront of technology (e.g., using taxonomies to classify content), deliver a compelling interactive experience, and providing a home for credible, high quality resources and a community of research practice on climate change adaptation issues. A responsive website that delivers consistency and optimal user experience on any device and in low-bandwidth areas is key.

Meeting users’ needs will be of central importance. It will enable our network to produce and share knowledge more effectively, and mobilize diverse and authentic voices globally. The platform should be a high-performing hub for the weADAPT community that enables SEI to deliver on its aim to bridge and connect the worlds of science and decision-making and weADAPT’s mission to accelerate learning, sharing and connecting on climate change adaptation.

The upgrade should offer multiple ways for users to engage with our content and network with an emphasis on: improved ways to visualize case studies; tailored communication and notifications (e.g., about newly published resources, upcoming events, training, personal analytics, etc); enhanced search and discovery of content; promotion of users’ and their institutions’ work and, ways for users to store resources for future reference. It could also include discussion spaces for live chat (e.g., topic-based with moderation) and private messaging or chat functionality for direct engagement with other members/experts/groups.
Value for the weADAPT platform:

- The website will increase the visibility and impact of the weADAPT community’s research and practice, project activities, events etc.
- A measurable, responsive and engaging experience for the user means weADAPT can better deliver on its vision.
- Facilitate collaboration, communication and learning between users.
- The site will communicate diversity, be globally relevant, and show weADAPT to be a key international platform in its field.
- Optimizing the platform for search engines (SEO) and ensure it is integrated with tools for measuring user behaviour to increase the impact of weADAPT’s communication by delivering relevant content to the user’s needs.
- A consistent and up-to-date user experience will offer more effective communication of the weADAPT community’s research and practice and improve dialogue between audiences.

How we will achieve success:

- Create a consistent user experience
- Focus on user journeys to create and discover related content (e.g., using tagging or taxonomies)
- Support users to find relevant content on the site
- Support users to find relevant content via external search
- Allow users to share and discuss content
- Provide a meaningful mobile experience

Success metrics and KPIs

- Increase engagement (sharing, viewing and downloading of content, and interaction with other users)
- Boost stickiness (time on site/user)
- Drive more organic traffic
- Optimize keyword performance and use in search and discovery of content
- Reduce bounce rate
- Measurable user journeys
- Increase regional diversity particularly from the global South
3. Scope

Summary of scope of work

- Validate and make suggestions to the existing platform strategy and KPIs
- Develop, build and launch an improved version of weADAPT, upgraded to Drupal 9
- Design and deliver all wireframe, visual design mock-ups, and on page content assets
- Maintain a stable and inspirational website
- Migrate and upload existing content
- Launch the upgraded platform
- Post-launch bug fixes and corrections and support
- Project management throughout the process
- Close collaboration with SEI weADAPT team

The platform must have an intuitive user interface and ability to find and discover information with a flexible back end (possibly using forms on the front end to increase ease of use) allowing users to easily upload their content. This will increase the site’s content and audience.

Website vision

SEI seeks a partner with a vision for weADAPT that is aligned with its goals. The vision builds on our requirements but is not limited by these. The successful tenderer will have strong technical capabilities and an inspiring visualization of what the platform can achieve for this growing community of research and practice.

The upgrade should address several additional key needs, including those identified by users in a recent survey. These are in priority order below, in case not all can be covered by the proposed approach. However, 1-6 are an essential part of the upgrade and the ability to cover 7-10 and any other recommendations by the tenderer would add value:

1. **Translation of the Adaptation Layer case study map.** Case studies on this map are considered extremely valuable by weADAPT users. The upgrade should include additional functionality in the display and discovery of case studies. The map also incorporates downscaled climate data from the University of Cape Town and this link must be maintained.

2. **Tailored engagement through personalised notifications.** Customised alerts about new research, projects, publications, events, training and analytics (e.g., number of times your content or profile has been viewed, number of followers), etc are considered to be extremely valuable by users. These exist to some extent but weekly digests with a roundup of content and personal analytics, taking users back to platform content, are desirable.

3. **Microsites:** these are built using same weADAPT infrastructure and should all also be translated to the Drupal 9.
4. **Tandem online guidance.** SEI’s climate adaptation planning tool, the Tandem online guidance, must also be upgraded to Drupal 9. This tool uses a schematic to draw weADAPT resources into different stages of the framework.

5. **Links to the Connectivity Hub.** weADAPT shares data with the Connectivity Hub, also developed by SEI. Links to this tool, and how weADAPT shares its data also need to be maintained.

6. **Improved ability to search and filter content.** Discovering content by topic, thematic area or through a network is key, possibly through the use of advanced tagging systems and taxonomies. For example, finding similar projects as well as adaptation options or lessons learned from different regions facing similar risks. This could also make more use of structured fields of content in articles e.g., searching on “methods” or “lessons learned” fields or better still, leveraging weADAPT’s extensive keywords and translating them into a taxonomy, for enhanced search and discovery. It could also improve the existing theme and network format.

7. **Personal dashboard.** Improved personal profile with suggested reading and contacts based on interests (submitted on registration) using keyword functionality. A personal library or use of bookmarks where useful content can be saved for future reference is also desirable. Profiles already list content that has been published by the user, or that is in the editing process.

8. **Improved user interface and homepage layout.** This would include improved user profiles and organisational profiles, with a smoother registration process, more seamless integration of the FAQs around the platform and easier ways to upload content (e.g., using forms rather than the Drupal backend) to increase the number of user contributions and streamline back and forth and editing with weADAPT knowledge managers and platform.
editors (e.g., using collaborative editing). Improved theme and network layouts may be possible and folds on long articles to contain/hide more detailed information and links to other content such as PDFs could add value.

9. **Translation of existing content: articles, organizations, users.** Improved ways of representing existing data and the way it interacts with other data types e.g., blogs or events. An in-depth review of the current composition of content types, and more flexibility to introduce new types (e.g., with new icons associated with them). As an example, weADAPT has both articles and training modules on the same topics. These need to be clearly differentiated for the user as different content types, and other new types may emerge over time. Administrators should be able to deal with this potential evolution seamlessly.

10. **Open and closed discussion spaces for live chat.** To increase collaboration, communication and opportunities for learning, discussion spaces (e.g., topic-based with moderation) or private messaging / chat functionality to contact other members/experts/groups working in similar areas are desirable.

The following basic principles are preferable for weADAPT:

- **Simplicity:** The design of the platform should have a look and feel of simplicity. Optimize navigation to be intuitive and most importantly make sure content is easily found and digested with an optimal user experience.

- **Flexibility:** The new platform should keep flexibility at its core to reduce risk of future additions and decrease of performance due to workarounds. There should also be flexibility with regards to future new content types or setups due to new projects, networks joining the platform.

- **Fresh and intuitive:** The design should not be out of date in just a few years. It should visually communicate messages in a clear and easy-to-use way.

The information architecture and user experience are key, so user testing of wireframes or mock-ups are important to confirm the best solution is in place. Tenderers are to suggest a process for the user testing of wireframes or mock-ups.

---

2 Information in weADAPT is organised using a distributed model of Themes and Networks which collect information about specific topics and act as hubs for people working on different aspects of climate change adaptation. Themes are led by different experts and organisations, who provide peer review the content within their Theme to ensure that it is high quality and publish it. The Theme and Network pages consist of a description of the topic, related articles, case studies, and a list of the theme/ network members and organisations. Each Theme also has a dedicated discussion forum for asking questions to the wider community and for sharing and discussing ideas, events and experiences. In some of our themes, the content is organised using a new format using subject-specific categories to help you explore the content you are interested in more easily. See full list of [Themes](#) and [Networks](#).
The designing of a robust website taxonomy will be key. Content needs to be categorized and tagged so that users can easily find it but also so that content is optimized for search engines (SEO).

Consider how to upgrade the platform so that it works well in low-bandwidth settings, in different languages and for those with disabilities. The key aspect of building any low-bandwidth site is reducing assets (and therefore requests for data). This means ensuring image sizes are as low as possible and that the number of custom fonts is limited.

The successful tenderer should provide written guidance on size of images and other downloads to facilitate content creation by the weADAPT knowledge management team at SEI.

weADAPT profiles should be promoted in an attractive and engaging way. Search and discovery of members is important (for visibility and for personal analytics), and a compelling presentation of each person needs to be in place. Personal profiles are currently connected to the user’s organisation and to publications contributed by the user.

The successful tenderer will be expected to deliver the following deliverables as part of this project:

A project plan, project management and collaboration with the contact person.

- The project plan must include project timelines, estimation of hours of involvement for the team, and risk identification including a mitigation of identified risks.
- Analysis and validation of the strategy and user journeys to determine recommendations of any improvements.
- Define required content and functional user experience features that allow weADAPT to engage with various personas.

Key functionality and structure

- The successful tenderer will analyse and make a recommendation regarding key functionalities and the structure of the website. The structure includes navigation, home page structure and main sections of the website and its microsites.
- A draft of site map will be created in this phase. Any internal processes affecting website structure will be discussed and decided on together with SEI. Key functionalities and structure of the website will be approved by SEI.

Design site taxonomy for the content on the site

Deliverables to include taxonomy documentation and template for populating keywords for current and future content.

Documentation of functionalities and structure including any guidance document of how to work with the upgraded platform.
Wireframes and mock-ups

Wireframes will be created, and mock-ups designed and will be approved by SEI.

User testing

To ensure the quality of the user experience there will be user testing of wireframes and mock-ups.

The successful tenderer will consider the issue of network reliability. When a connection cuts out (if there is a power cut and a switch to a backup generator), the CMS will retain data where possible, so less work is lost.

This would mean that a simple plug-in will need to be built into the CMS that autosaves when required. This functionality would be especially useful to contributors in developing countries.

Development

The tenderer will develop and build improved web properties in order to support the current platform goals, while simultaneously aligning towards potential opportunities and ensuring weADAPT’s mission.

The development should be done in an agile approach allowing for reprioritization during the project to maximize business benefits in a changing environment.

The website shall be built using responsive design so that the website provides a great user experience no matter what device the user uses: desktop, laptop, tablet or mobile phone. A user-friendly backend is key, and the website will be flexible for the long term. The structure and interface should continue to be independent from the content types to allow for future reconfigurations of how users interact with our content.

The successful tenderer will be expected to deliver the following deliverables as part of this project:

- **Build of website** – Includes all front-end development and back-end development and any integration point.
- **SEO optimization** – All build should be done to optimize for SEO. On-page SEO is of great importance.
- **Migrating content** – Migrate, clean up and upload of content from 6 microsites and existing platform. Migration of content will be efficient and well-planned so that no content is lost.
- **Integrations** – Integration of third-party applications and services e.g., MailChimp.
- **User testing** – Technical, functional and performance testing of solution.
- **Analytics** – Implement analytical tools to the upgraded platform. E.g., Google Analytics.
• **Google Analytics** – Configure Google Analytics with goals and dashboards according to the website strategy and KPIs.
• **Google translate** – Continued or improved integration to allow for immediate translation of content into multiple languages
• **Launch of website** – launch into live environment and any redirects from existing websites.
• **Launch plan** – A launch plan should be created to ensure a smooth launch of the new website by December 1st, 2021.
• **Documentation** – Technical documentation and user instructions.
• **Post launch support** – Bug fixes and maintenance to ensure website and components are working properly for 6 months after launch.

## 4 Approach and methodology
The consultants shall design and implement the upgrade so that it meets the stated objective. SEI expects the consultants to conduct a discovery phase to fully assess the needs of the platform, and then to wireframe a range of options for implementation. These should be presented to SEI for discussion and iteration to co-produce a design that is fit for purpose.

The consultants are expected to engage with the weADAPT team to understand the needs of the weADAPT audience. A close collaboration with the weADAPT Strategic and Technical Coordinator is key. The successful tenderer is responsible for adhering to weADAPT’s branding.

## 5 Reporting and communication
During the start-up period, consultants shall develop a detailed work plan. SEI will approve the detailed work plan before work commences. The SEI contact person will remain available throughout the process, and consultants are expected to liaise regularly with them. The consultants shall provide a first version to SEI for review and comments before a final version is implemented e.g., using wireframes if necessary.

Full documentation is expected detailing new features and functionality of the platform, with the baseline KPI that can be assessed over time.

## 6 Schedule
The implementation should be concluded by 31 December 2021, with a first version online by 15 November 2021 and launched on 1 December 2021. Work is expected to commence no later than 4 October 2021.
### Contact information of tenderer

#### General information

<table>
<thead>
<tr>
<th>Description</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Form of organisation (legal incorporation)</td>
<td></td>
</tr>
<tr>
<td>Name of organisation/company</td>
<td></td>
</tr>
<tr>
<td>Visiting address</td>
<td></td>
</tr>
<tr>
<td>Postal address</td>
<td></td>
</tr>
<tr>
<td>Postal code, city and country</td>
<td></td>
</tr>
<tr>
<td>Telephone number, incl. country code</td>
<td></td>
</tr>
</tbody>
</table>

#### Contact person for the contract

<table>
<thead>
<tr>
<th>Description</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td></td>
</tr>
<tr>
<td>Telephone number, incl. country code</td>
<td></td>
</tr>
<tr>
<td>Mobile telephone number, incl. country code</td>
<td></td>
</tr>
<tr>
<td>E-mail</td>
<td></td>
</tr>
</tbody>
</table>

#### Contact person who can answer questions that may arise during the tender

<table>
<thead>
<tr>
<th>Description</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td></td>
</tr>
<tr>
<td>Telephone number, incl. country code</td>
<td></td>
</tr>
<tr>
<td>Mobile telephone number, incl. country code</td>
<td></td>
</tr>
<tr>
<td>E-mail</td>
<td></td>
</tr>
</tbody>
</table>