



## **Request for proposals: Development of innovative, interactive digital platform for producing and displaying evidence gap maps**

**Issue date: 15 November 2019**

**Deadline for applications: 5 December 2019, 23:59 GMT**

### **1. About 3ie**

The [International Initiative for Impact Evaluation \(3ie\)](#) is an international NGO that promotes evidence-informed equitable, inclusive and sustainable development. We support the generation and effective use of high-quality evidence to inform decision-making and improve the lives of people living in poverty in low- and middle-income countries (L&MICs). We provide guidance and support to produce impact evaluations and associated formative evaluations; systematic reviews and syntheses, evidence gap maps and support for using that evidence in decision-making and capacity development. 3ie is registered as a non-governmental organisation in the United States. It has offices in New Delhi, London and Washington, DC.

### **2. Summary of this request for proposals**

3ie evidence gap maps (EGMs) are thematic collections of impact evaluations and systematic reviews, two types of research that 3ie produces and makes publicly available on its website. They present a visual overview of existing and ongoing studies or reviews in a sector or sub-sector in terms of the types of programmes evaluated and the outcomes measured. 3ie developed its first interactive EGM platform in 2015. One version is proprietary for displaying 3ie EGMs and one is a separate version that is available to approved users. This request for proposals (RFP) seeks applications from qualified, experienced digital developers who can create a new, more advanced and interactive platform that will also be digitally integrated, via the 3ie website, with the new 3ie evidence repository (which is the main source for all studies and reviews in any 3ie EGM).

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### 3. Background: current 3ie EGM platform

The current 3ie EGM platform<sup>1</sup> presents a visual overview of existing and ongoing studies or reviews in a sector or sub-sector in terms of the types of programmes evaluated and the outcomes measured. A key component is an online interactive platform that allows users to explore any given result bubble to see a list hyperlinked title and some defining information for impact evaluations and systematic reviews included in the map. An example of this map is provided below, and details and examples of our EGMs can be found [here](#).



Figure 1: Example of a 3ie evidence gap map

Each included study or review has metadata extracted and tags assigned to allow sorting of its intervention(s) and outcomes in the map using a standardised Microsoft Excel® template. This information is then uploaded to the EGM builder via an uploader feature available in the platform.

In the EGM builder, users specify the X-axis (outcomes – final and intermediate) and Y-axis (interventions). The platform application generates a matrix (map) based on these variables. The map has bubbles at intersections between interventions and outcomes, which represent studies examining the relevant outcome and intervention. The size of the bubble indicates the size of the evidence base – the larger the bubble the greater the volume of evidence in that cell. By hovering over a bubble, users get hyperlinks to study summaries available in the [3ie Evidence Repository](#).

<sup>1</sup> 3ie EGM platform uses Drupal as its CMS in the following set up:

- Drupal (web framework) version: 7.59 with customised templates
- PHP version: 5.6.36-1
- Web server: Apache/2.4.27 (Ubuntu)

## 4. Scope of work

This request for proposals (RFP) seeks applications from qualified, experienced digital developers who can create a new, more advanced and interactive EGM platform that fully meets our mapping platform needs (outlined in detail in Appendix A).

This project may be informed by current features and functionality of the [existing platform](#), but the outcome of this project will be a new platform.

The new EGM platform will be integrated with the 3ie's new Evidence Repository and will be part of the Evidence hub on the 3ie website. In the hub, the user will be able to select EGMs separately or access them via the evidence repository. The vendor will have to make sure that the EGM platform technologies fully align with the ones used in the evidence repository platform, which is currently under development.<sup>2</sup> 3ie will provide the successful applicant with sufficient introduction to the repository platform, including the new admin for the repository.

The platform must be designed using open source software that is compliant with [World Wide Web Consortium \(W3C\)](#) standards, viewable in all popular web browsers running on Windows, OSX and Linux operating systems. The EGM platform must be developed using responsive design, be based on Web 3.0 attributes and, at a minimum, be automatically adaptive for use on smart phones and tablets.

In addition to the elements outlined above, proposals must include all of the essential elements described below:

- **Security:** Describe how you will develop the site to prevent security breaches such as spam, viruses, phishing, DOS attacks, site hijacking, unapproved posting and content, FTP access, personal information or database thefts.
- **Speed:** Describe how you will ensure fast site loads and the specs to which you will design. Describe how your design will accommodate slower speeds in internet-constrained or mobile data constrained areas.
- **Plugins:** Describe the level of plugin compatibility for Java and others you will design to, as well as detection software for user compatibility and download or upgrade options for users.
- **Search engine optimisation:** Describe how you will develop the platform to maximise optimal search returns.
- **Mobile:** Explain how you will design the site so that it – or an optimised version of it offering virtually identical capabilities – will render appropriately on mobile devices such as smartphones and tablets of varying manufacturers and dimensions.
- **Simplicity:** The platform design should skew relentlessly toward simplicity.
- **Flexibility:** The platform design should have flexibility at its core to diminish the likelihood of haphazard future additions and performance-sapping workarounds.
- **Fresh and intuitive: The design should not be easily out of date in fewer than five years: clean and modern. It should visually communicate messages clearly and succinctly. The design should be consistent with 3ie's branding requirements (Appendix C).**
- **Accessibility:** Describe how your design will consider users who are colour-blind and who may need accommodation for visual impairment.
- **Functionality:** Please provide this information:

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<sup>2</sup> The new repository CMS is Laravel Nova. The relational database management system is MySQL. This platform uses these third-party systems: Mailgun, Elastic search, Redis Cache and Amazon.

- Strategy for identifying how to update and expand features and functionalities outlined in Appendix A, which will include consulting with 3ie staff and other stakeholders to identify additional needs, updating the table with any additional features and functionalities and adding further detail to the table as needed.
- Describe how you will migrate all the existing content, links and multimedia content from existing platform, including testing and the overall time needed before handover
- Include how you will integrate third- party applications and services.
- Offer easy sharing options for content via social media.
- Open source is preferable.
- Platform testing and implementation.

## 5. Platform maintenance

The successful applicant should ensure implementation, troubleshooting and maintenance support for the platform for 90 days after it has been accepted by 3ie to ensure a successful migration from the old to the new design. 3ie will have the option to continue to avail these maintenance services after 90 days or tender for ongoing maintenance without any further obligation.

## 6. Eligibility and minimum qualifications

- Only legally registered companies or organisations are eligible to apply. Individuals or a consortium of individuals are not eligible to apply,
- The contracted vendor must be a reputable firm in the field of website design with a demonstrated record of relevant and successful projects. Relevant experience in working with academic, research or NGO online database applications will be given preference.
- The applicant must be able to assign a design and development relationship manager responsible for understanding 3ie's current platform and our needs in detail and who will be responsive to 3ie communication within 24 hours.
- The vendor/firm must have sufficient expert staff on board and available to work on any 3ie contract from the time of signing. See also information below on project personnel.

## 7. How to apply

3ie requests all eligible parties to submit their proposal to [web@3ieimpact.org](mailto:web@3ieimpact.org) with '3ie EGM platform development RFP' included in the subject line. **The deadline for submission of proposals is 5 December 2019 by 23:59 GMT.** Only complete submissions meeting the eligibility requirements will be considered.

Eligible companies or organisations are required to include the following documents as part of their proposal package:

### 7.1. Technical proposal

The proposal shall not exceed 15 pages + appendices, containing at a minimum:

- A design section which clearly presents how the vendor will provide the required and desired elements described in in Appendix A of this document;
- An implementation plan which reflects the timeframe and milestones provided in Appendix B;

- A brief profile (maximum two pages) of the company or organisation focused on information relevant to this project;
- An appendix with project record which demonstrate experience delivering similar projects (including project title, type of project, type of client, location, duration from start of contract to final payment and total contract value); and
- CVs of essential project personnel.

## 7.2. Financial proposal

The financial proposal must include the following information:

- A budget with rates for all services provided, inclusive of all taxes or other applicable charges you will levy;
- A clear explanation of how work is charged; and
- A brief statement about how the services offer good value for money.

3ie expects to shortlist up to three applications. These firms will be invited to present via an online<sup>3</sup> panel meeting. 3ie expects to name a successful vendor within 10 days of the last interview. **3ie reserves the right not to invite anyone to present, the right to ask for further information and/or a further interview.** Please see Appendix B for an indicative detailed schedule.

## 8. Frequently asked questions

Registered parties can send their questions and queries to the above email id by **22 November 2019**. 3ie will provide compiled **responses to all applicants by 24 November**. Thereafter, 3ie will respond to individual queries from registered parties as received, with the information being shared with all registered parties.

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<sup>3</sup> It will be a video meeting where vendor can use the power point presentation along with the video. 3ie will use a third-party video conferencing tool, such as Zoom, GoToMeeting BlueJeans or G2.

## Appendix A: Features and functionalities

Type of feature	Details	MVP	Comments
<b>Overall</b>	The platform needs to be designed with a five-year window for being powerful and flexible enough to meet 3ie's needs	Essential	Be possible to integrate Tableau
	The platform needs to be either 1) fully complementary OR 2) fully integrated with the 3ie IE and SR repositories (but need option to import data from different sources and expand the data structure)	Essential	
<b>Display</b>	User generated labelling of the x and y axis	Essential	This means the user can determine the labels of the framework and theoretically at least have this be something different from interventions and outcomes.
	Amount of studies displayed should not slow down how the map runs or user's actions	Essential	
	Allow choice of which outcomes and interventions to display, allowing the user to see what interventions and outcomes that matter to them.	Desirable	This may only be a backend feature
	Provide some standard data viz. figures for a given map that can be exported as a jpg.	Bonus	Integrate Tableau now or build in ability to add later
	Studies list needs to be a stable pop-up. The studies in the pop up needs to be organised according to some logic (e.g.: chronologically, alpha etc.)	Essential	
	User to change the business rule for ordering of studies (options: alpha, chrono, ongoing, completed, country alpha)	Desirable	
	Flexibility to create and name variables to be visibly displayed in the form of symbols in the map	Essential	This means that the user theoretically can decide what is displayed and the meaning of colours/ symbols
	Symbols in the EGM should indicate 1		
	Ongoing studies (IEs) to be displayed separately	Essential	
	Have the list in the pop-up box able to be sorted by year or alpha or completed or ongoing or grouped by IE or SR (these are four possible sorting combination options)	Essential	User determined sorting is not essential, but some business rule needed for sorting

<b>Time frame</b>	Ability to handle time frame independently from filtering, as is possible on academic databases.	Bonus	This is a repository feature, so not essential for EGM
<b>Filters</b>	Standard filters available for all maps: study design, country, region and equity/population.	Essential	Consider breaking out IEs by experimental or quasi-experimental or both. Add ability to choose non-experimental and choose grey literature, if we expand capabilities to include non IEs and SRs.
	An additional 4 optional filters, with these being flexible and backend user generated depending on needs for each EGM	Essential	
	All filters should be multiple choice	Essential	
<b>Framework</b>	Should allow two levels of categorisation for both outcomes and interventions as per the current EGM platform	Essential	
<b>Data importer</b>	Stable and user-friendly data importer	Essential	If fully integrated the coding will be done in the repository, and studies selected for inclusion in the map
	Ability to bulk upload data from 3ie repository and csv files	Essential	
	Ability to add and/ or edit individual records	Essential	
	Feature to protect from duplicate data entry	Essential	
	Flexibility to expand the data structure to include different variables	Essential	
<b>Exporting</b>	Be able to export lists of studies in a pop-up of a bubble, and the entire map	Essential	Decide if in Excel or ris to allow export to bibliographic software
	Be able to export underlying data	Essential as a back-end function	Need to discuss if/ how we make data available
<b>Bandwidth</b>	Optimise for low bandwidth	Essential	
<b>Optimise for smart phones and tablets</b>	The platform should be optimised for smartphones and tablets	Essential	

## Appendix B: Draft indicative schedule and deliverables

Date	Deliverables
22 November	Deadline for submission of questions related to the RFP.
24 November	Responses to questions related to the RFP
5 December	Proposal submission deadline
Week of 9 December	Interviews with firms
Week of 16 December	Contract signing
Week 1-4	Discovery and graphics design <ul style="list-style-type: none"> <li>- Project plan</li> <li>- User stories, workflows and wireframes</li> <li>- Design concepts</li> <li>- UI design mock-ups</li> <li>- Technical documentation</li> </ul>
Week 5-12	EGM development and testing <ul style="list-style-type: none"> <li>- Developing test cases</li> <li>- Site building and documentation</li> <li>- SEO related technical aspects</li> <li>- Performance and security checklist</li> <li>- Testing</li> <li>- Test case documentation</li> <li>- Working EGM platform with dummy data to feature the theme and functionalities implemented</li> <li>- Test execution report</li> </ul>
3 months from contract signing	Content migration and Deployment to live server <ul style="list-style-type: none"> <li>- Content migration planning</li> <li>- Implementing migration scripts</li> <li>- Setting up live server</li> <li>- Move the Stage environment to Production environment</li> <li>- Live site</li> <li>- Platform training</li> </ul>
Post EGM platform launch completion	Maintenance (90 days) <ul style="list-style-type: none"> <li>- Bug fixing</li> <li>- Any agreed outstanding design elements post delivery</li> <li>- Security updates</li> <li>- Backup</li> <li>- Handling critical issues</li> <li>- Periodic maintenance report whenever a maintenance activity takes place</li> </ul>



## Appendix C: Branding guidelines

This EGM platform must follow our institutional branding elements, including guidelines for using the logo, colour palette and typeface. 3ie can supply the logo and the colour palette to organisations submitting a proposal, upon request.

### 3ie logo

The 3ie logo is a key part of our visual identity. As it is the most visible part of our identity, particularly the 3ie chiclet, care must be taken to ensure our logo is used correctly and consistently across all communications so as not to compromise its integrity, value and effectiveness.

The three-line 3ie logo is used for all institutional material and platforms, such as the website, and on 3ie's social media profiles and all other online platforms.



































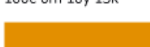
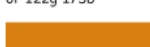

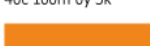
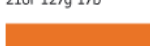

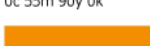



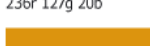


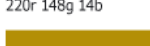


### Dos and don'ts for using the 3ie logotype:

- Do not stretch or alter any of the logotypes, always use them as they are supplied.
- Do not use a colour logo on a background that makes it unclear or fights with it in any way. Consult 3ie's policy, advocacy and communication office on using the appropriate logo for different coloured background i.e. white or light, mid-tone or dark backgrounds.
- Do not crop a logotype or encroach on its exclusion zone.
- Do not modify the typeface of the text in the logo.
- Do not use colours outside of the 3ie colour palette (see below)
- Do not colour the text of the logo.

### 3ie colours

Our colours have been chosen to make 3ie stand out and create impact. 3ie’s colour palette (below) shows the colours that 3ie uses for specific knowledge products and programmes.

	Pantone	CMYK	RGB
3ie dark blue	 280	 100c 89m 21y 7k	 21r 58g 128b
3ie light blue	 277	 27c 9m 0y 0k	 180r 210g 238b
IE red	 1797	 10c 80m 70y 0k	 200r 55g 55b
SR Green	 383	 30c 0m 90y 20k	 143r 177g 0b
RP Purple	 258	 45c 75m 0y 0k	 144r 62g 138b
WP Aqua	 3282	 80c 15m 40y 5k	 0r 139g 138b
Alt 1	 2665	 60c 60m 0y 0k	 106r 88g 159b
Alt 2	 5415	 40c 10m 0y 40k	 97r 125g 149b
Alt 3	 167	 0c 60m 100y 20k	 194r 90g 18b
Alt 4	 241	 27c 100m 0y 0k	 172r 0g 108b
Alt 5	 313	 100c 0m 10y 15k	 0r 122g 173b
Alt 6	 138	 40c 100m 0y 5k	 216r 127g 17b
Alt 7	 1585	 0c 55m 90y 0k	 234r 116g 38b
Alt 8	 152	 0c 50m 100y 0k	 236r 127g 20b
Alt 9	 131	 0c 35m 100y 10k	 220r 148g 14b
Alt 10	 118	 0c 20m 100y 30k	 179r 143g 6b