TERMS OF REFERENCE (ToR) FOR WEBSITE DEVELOPMENT

1. INTRODUCTION

The Humanitarian Quality Assurance Initiative (HQAI) is a Geneva-based not-for-profit organisation whose objective is to improve the quality and accountability of humanitarian and development organisations through the provision and promotion of independent quality assurance. Its auditing services are intended to improve the sector.

HQAI operates three models through which organisations can be audited against the commitments in the Core Humanitarian Standard on Quality and Accountability: benchmarking, independent verification and certification, with certification being the pinnacle of achievement. Certified organisations receive a quality assurance seal. The seal symbolises trust.

In the second half of 2020, HQAI plans to roll out a public campaign to raise the awareness of the quality seal among members of the English-speaking public (particularly those in the UK). The niche in which HQAI works in the humanitarian sector is complex. For the general public to understand the value of the seal, the messaging will need to be simple.

The website currently operates as the first point of contact for humanitarian and development organisations looking to either contract HQAI for an audit, or to find out more information. This remains an essential function of the website. However, another key audience will be members of the general public, who will be directed to the site by the campaign above. While the messaging for all those coming to the site needs to be simple, clear and brief, there will clearly be two quite distinct user journeys: one for organisations looking to get audited, another for members of the public understanding what the quality seal means and which organisations have been granted the seal.

Therefore, HQAI is seeking a company to:

- Develop a new website on a secure, efficient, easy to handle, and cost-effective platform in an attractive design based on the audience mapping and needs analysis (see Annex)
- Migrate the content of its current website, as well as newly created content to its new website (support in content creation to be discussed)
- Provide support on request throughout the development phase and suggest a longer-term package of support (to be discussed)

2. OBJECTIVE OF THE WEBSITE

The website is HQAI’s primary COMMUNICATIONS TOOL, with all digital content (on social media etc.) linking back to the site. The website reaches people working in the humanitarian sector (in organisations, in think tanks, and in academia) and - in the future - members of the general public that either donate to aid projects, or are interested in how their government spends aid budgets.

Given the broad audience, it needs to have a clear and intuitive navigation, extremely simple messaging, be user friendly and attractive with a multi-media approach and social media integration.

The two main communication objectives are:

A) to increase the CUSTOMER BASE (audited partners) and meet their various information needs (general easy to grasp information but also offering access to precise, technical, detailed information “on demand”)

B) to offer easy access to simple information for the GENERAL PUBLIC.

For A) the site (1) should facilitate fast and easy UNDERSTANDING of the benefits of HQAI’s services, (2) should provide an easy and user friendly ACCESS to our processes for audited
partners, including a search function and a cost-calculator for potential new customers, (3) should facilitate the APPLICATION process by allowing interested parties to fill their information in an online application form that can be exported to an external data base, and (4) should GUIDE people to understand and use our appeal and complaint mechanisms.

For B) this is where the quality seal needs to be front and centre. The public campaign will focus on recognition of the quality seal, and not on HQAI as an organisation. Therefore, the website (or a dominant user journey) needs to meet people with no prior information of certification and only visual recognition of the seal. The site needs to allow for the gradual sharing of information of greater complexity as the website journey is deepened. However, all website text should be written assuming no prior knowledge of humanitarian accountability and quality assurance.

The website must be effectively referenced and Search Engine Optimised (SEO) to facilitate access to and increase the traffic on our new website.

A) and B) require different depths of information. The website architecture will be a key instrument to navigate them easily to their destination.

WORDS to describe the new website: innovative, modern, elegant, lively, diverse and inclusive (people, stories, interviews, testimonials from vulnerable people, audited organisations etc.), minimalistic, space for white, interesting to make visitors stay.

3. SCOPE OF THE CONSULTANCY

- With the HQAI team and through research with audiences, construct a navigation that facilitates user journeys based on audience mapping and the construction of key audience personas.
- One-off development work
- Site migration
- Provide support on request throughout the development phase and suggest a longer-term package of support (to be specified in the offer)

3.1 Personas, architecture, navigation

3.1.1 Based on the audience mapping and needs analysis in the Annex, finalise the mapping and develop the navigational needs for key audience personas

3.2 One-off development work

3.2.1 Based on the branding guidelines (Style Guide) of HQAI, audience and content mapping and needs analysis, propose three concepts and designs, and subsequently test usability, engagement and attractiveness with HQAI staff and a set of audience types (auditors, governance bodies, audited partners, etc.)

3.2.2 The website should be based on a CMS that allows for effective management of the site including staff being able to modify layout

3.2.3 Integrate the most important social media channels, and ensure optimised social media posting (e.g. pictures and text appear appropriately on social media, content can be easily shared by users on social media)

3.2.4 Include a search functionality for the website

3.2.5 Include an “application” form

3.2.6 Develop a user-friendly cost calculator for potential new customers

3.2.7 Develop or tailor an existing resource library module with an effective search function to accommodate different kind of digital resources

3.2.8 Include a preview mode for draft changes

3.2.9 Optimise site for low-bandwidth users
3.2.10 Ensure full GDPR compliance of the website
3.2.11 The site must be compatible with all web-browsers
3.2.12 The site must be Search Engine Optimised
3.2.13 Develop an automated testing system that identifies broken hyperlinks
3.2.14 Integrate SSL certification
3.2.15 Include web analytics
3.2.16 Enable admins to categorise content using keywords (tags) and predefined categories that can be edited by admins
3.2.17 The main language is EN and we would like to have the option of adding more languages (to be discussed)

Design and content related development work
3.2.18 Particular focus must be put on the design of an appealing and easy to navigate Homepage taking into account the different groups of visitors and individual needs
3.2.19 Create graphics, animated numbers and templates for graphics based on content (subject to discussion)

3.3 Site migration
3.3.1 Migrate content to new website
3.3.2 Add new content to new website
3.3.3 Current content of website can be used for new website on “lower” levels. Main types of content on current website: text, photos, videos, PDFs.
3.3.4 Ensure timeliness of migration activities so as to guarantee no down times of HQAI website

3.4 Support on request
3.4.1 Give guidance and create a clear manual on using the admin interface of the CMS
3.4.2 Training session(s) for the MarCom team on the new CMS
3.4.3 Provide support to ensure seamless communication between the website and the internal data management system
3.4.4 Provide access to the backup, the code and all website files in full to the client any time the final website has been delivered
3.4.5 Support for specific questions after development phase (to be outlined separately in consultant offer)

3.5 Deadlines
- Expected start of services is May 2020
- Expected launch of new website September 2020

4. SELECTION CRITERIA
The company should have:
- Strong experience in website development
- Understanding of end users’ needs to match them with the adequate technical solution
- Strong track record in website design; security and administration; (google) analytics
• Experience in SEO
• Ability and capacity to answer to support requests
• Ability to work in English (oral and written)

5. SELECTION PROCESS

The proposal should:
• Clearly establish an understanding of the required services, clearly featuring the four areas of work in section three
• Refer to best practices
• Describe how the company engages with the clients: what internal processes they follow to meet deadlines, be transparent about the rates of their services and ensure quality and accountability
• Establish a project timetable
• Provide a financial proposal; the budget should be broken down by activity

The submitted proposals will be evaluated according to the following criteria:
• Profile and experience of the company
• Professional capacity and experience
• Accessibility and proximity of the support team
• Value for money

For any further information, please email: ahunziker@hqai.org.
The proposal should be submitted before CoB April 21, 2020 to ahunziker@hqai.org.
6. ANNEX

6.1 Annex 1 audience mapping

1. **Audited partners (= customer base):**
   In a nutshell: these are national, international, and multi-governmental (e.g. UNICEF) organisations working in humanitarian action and development. They are certified, independently verified or benchmarked against the CHS by HQAI. 
   Objective website:
   - easy access to reliable information
   - Proactively use HQAI’s website to find relevant Policies and Procedures, News & updates, appeal and complaint mechanisms
   - Find their organisation profile updated with current audit status and reports (HQAI showcases summarised audit reports publicly on its website)
   - Share information, news & updates on social media
   - Use of our material for their own communication (conversion to social media)
   Location: global, crisis-areas
   Preferred devices: mobile + computer
   Language: English & potentially Spanish, Arabic, French, etc.

2. **Members of the general public:**
   In a nutshell: generally unaware of HQAI and what we do. They have no understanding of the essence of our auditing services, but they want to know where their money goes (tax and private donations). We want to get them interested and proactively search for certified organisations.
   Objective website:
   - Awareness of existence and benefits of HQAI’s services; access to general information
   - List of certified organisations
   - Explanations on how they can get involved; Call to Action/share our content
   - Conversion to social media platforms
   - Share content from website & social media platforms (e.g. make an easy conversion from our website to sharable content on different social media platforms)
   Location: Western audience - Europe, Northern America, Australia, New Zealand
   Preferred devices: mobile + computer
   Language: English & potentially EU languages

3. **Potential new audited partners (potential customers):**
   In a nutshell: potentially most national, international and multi-governmental organisations working in the humanitarian and development sector. They may have heard of HQAI and need further information, including about subsidies and other ways to access HQAI services.
   On our Website they will get a first impression of what HQAI does; understand the benefits, read testimonies from other organisations. At a later stage, an application form will be filled-in online and sent to HQAI.
   Objective website:
   - Awareness of existence and benefits of HQAI’s services; access to specific information
   - Watch videos, testimonials, engage with content
- Find out about Group scheme and subsidy fund
- Conversion to social media platforms
- Contact us
- Sales / Fill-in application form

Location: global, crisis-areas
Preferred devices: mobile + computer
Language: English & potentially Spanish, Arabic, French, etc. —> we want to be open to extend the website to more than one language

**Secondary audiences:**
- The CHS Alliance and other strategic partners (e.g. Disasters Emergency Committee, H2H Network, ICVA, etc.)
- Staff & corporate bodies of HQAI
- Governmental donors (e.g. DANIDA, GFFO, DFID, SDC)
- Media
- Job seekers, consultants and future auditors
- Competitors (KPMG, PWC, etc.)

**6.2 Needs analysis**

**6.2.1 Audience needs:**
The needs of different audiences have been analysed through a short questionnaire sent to the Secretariat Staff, audited partners, strategic partners and representatives in the governance bodies (see Annex 3 for questions&answers). Here a short summary:

- The use of sections on the current website are as following: Home (81.8%), News (72.7%), Audited organisations (54.5%), Services (36.4%), About, Resources (27.3%), Partners (18.2%), Contact (9.1%)
- The users currently like the easy to navigate menu, home page with news and videos, the informative content
- The users currently dislike the obsolete design, too much text, lack of consistency in picture size and quality, navigation
- The users miss a direct contact to the Secretariat, a clear message on the value of HQAI, info graphs and pictures, simplicity

**6.2.2 HQAI’s needs:**
The current website was created at the time of the launch of HQAI (2015) and based on the knowledge about audiences, needs and www customer journeys that was available at that time. Design, content, navigation are not ideal any more. Further, we experience technical and operational difficulties with the current CMS setup.

There are four main reasons for a re-design:

1. **Management** of current website is cumbersome. The current set-up of the CMS is complicated and not user-friendly.
2. **Content:** HQAI wants to simplify its message about who we are and what we do. We need better storytelling, also by using videos and testimonies. However: we are professional auditors and the rigour, reliability, transparency of our services
must be thoroughly reflected through the website. In other words: perfectly clear, correct, complete content but in a more accessible way.

3. **Access** to information: HQAI wants to present itself more accessible & user-friendly through its new website. We want a simpler structure and that different audiences find the information they are looking for in 3 clicks!

4. **Design**: HQAI stands for innovation, rigour, transparency, elegance, a human and partnership approach. This should be reflected in the design.

6.3 Annex 3: Questions & answers from online questionnaire

Type and numbers of respondents:

- Secretariat Staff: 3
- HQAI governing boards (i.e. Director of Board of Directors, Members, etc.): 3
- Auditors: 3
- Strategic partner - CHS Alliance: 1
- Audited partner: 1
- Total: 11

Question 1: What sections on the current website of HQAI are you using?

![Bar chart showing usage of website sections]

1. Home (81.8%)
2. News (72.7%)
3. Audited organisations (54.5%)
4. Services (36.4%)
5. About, Resources (27.3%)
6. Partners (18.2%)
7. Contact (9.1%)

Question 2: Do you usually find the information you are looking for?

Index:
1: No never, it is very difficult and time-consuming to get the information I need
7: Yes, very easily!

Question 3: What do you really like about HQAI’s current website? Write down three things that come to your mind (bullet points are enough).

- easy to navigate menu (2x)
- simple colours
- sideshow of top stories useful
- it’s clear (2x)
- uncluttered
- Home page updates with videos, news (2x)
- humanitarian feed,
- information on auditors,
- complaint and appeal process
- explain subsidy on first plan
- Good banner headings
- Variety of news format (films, quotes, facts eg audited organisations)
- Transparency (reports on audited organisations).
- tonnes of info, brings everything together (ie Twitter) so I can see what’s happening in one place, the videos / mixed ways of presenting things and telling HQAI and community stories.
- Available information and videos
- Precise
- informative
- insightful
- Tonnes of information and brings everything together (ie Twitter), so I can see what’s happening in one place
- The videos and mixed ways of presenting things
- Community stories

Question 4: There are certainly things you dislike about HQAI’s current website. Write down three of them (bullet points are sufficient).
• It’s not very “modern”, the overall look has some kind of nasty 90’s vibe. It’s not easy to navigate between sections. The most important information (in my opinion) is not displayed in relatively reachable parts (for example resources)
• images often look too small or blurry
• very busy, a lot of information on each page
• lots of capitalised headings! Maybe personal, but I don’t like these.
• My computer is small so it tends to display the site in a different way. I most dislike the News section as you don’t see how to access older news. Plus the news section has a mix of things, subjects, etc There should be categories to find more easily the info.
• Huge number of policies and guidelines
• Secretariat not very prominent (2x)

Question 5: What is missing on HQAI’s current website?
• More simplicity
• Direct link with an information management system...
• A catchy intro video
• More about the Statutes and policies of the organisation
• I think we should make director contact with the secretariat easier. Currently I can only find contact@hqai - we shouldn’t hide behind anonymity!
• Details on number and type of complaints and appeals (disaggregated of course)
• The DFID logo is on the front “news scroll” but they are not mentioned in the text. I think the range of information is comprehensive. Should the logos on the partners tab have hyper links ie to jump to CHSA or DEC?
• Message on what is the value of HQAI certification.
• Pictures and info graphs instead of texts