Terms of Reference for Open Ownership website redesign

Background on Open Ownership

Open Ownership is a non-profit run by a small, multi-disciplinary team who work to strengthen accountability and advance transparency in company ownership. Its researchers, country experts, analysts and technologists work with dozens of countries to produce detailed guidance and technical advice on best practice when it comes to beneficial ownership transparency. With a growing team, and increasing engagement round the world, Open Ownership wants to ensure that all of its work and technical guidance is accessible to our core user groups – government reformers, civil society, data users, businesses and the private sector.

Summary

Open Ownership wants to relaunch its website – https://www.openownership.org – **to become a global beneficial ownership knowledge hub**. We want to ensure that all the information and resources we produce are easily discoverable, accessible and navigable to users worldwide.

We are looking for an team or agency to:

– conduct user research on our behalf;
– design and conduct the technical development and build of a new or refreshed website which best fits with the needs of our users, both current and potential.

Please note that the creation or updating of content, following user feedback, will be carried out by Open Ownership rather than the team which wins this tender.

Specific requirements

1. At the moment, research, briefings and reports are all published as PDFs but we would like to change this in order to publish reports in HTML.

2. We have experimented with translating key resources into multiple languages and would like the ability to better support the translation and presentation of research in a range of languages on our website.

3. The above two points are two of the ways that we hope to improve the accessibility of our website to meet WCAG 2.1 AA accessibility standards, while ensuring that it remains user-friendly and easy to navigate.

4. Our team curates information on beneficial ownership commitments and implementation from across the globe using Notion databases. These are integrated into our current website to power functionality, as seen with the Open Ownership map. We would like to be advised on the best ways to present this information to our users, in order for them to discover up-to-date information and links relating to any country.

Note

Open Ownership maintains the Beneficial Ownership Data Standard website – http://standard.openownership.org – and the Global Open Ownership Register website – https://register.openownership.org – which are published using separate platforms. Updating or changing the Beneficial Ownership Data Standard and Global Open

Ownership Register websites is outside of the scope of this tender, but links to these resources should be prominently incorporated where appropriate on the redesigned Open Ownership website.

Who are our users, and what do they need to do?

Open Ownership works with people at every stage of the beneficial ownership transparency journey from governments seeking to commit to increased transparency to those making the necessary changes to legal frameworks and systems – and on to people responsible for collecting/verifying data and publishing it.

As more beneficial ownership information and data starts to be published, we want the work we do to be useful to people like government officials, researchers, journalists and campaigners who wish to learn about beneficial ownership from our expert team or discover and make use of available data.

Below are three sample users of the Open Ownership website, these user groups would need to be ratified by research:

User 1

I am a government official tasked with tackling corruption and money laundering in my country. I need to understand emerging global best practices around beneficial ownership transparency so my government is well informed and best placed to put in place the right laws, systems and tools to tackle this issue.

User 2

I am a representative from a campaigning global NGO working on anti-corruption looking to investigate whether politically connected people own companies which unfairly receive public funds.

User 3

I am a compliance executive from a multinational company operating in higher risk jurisdictions and working with a significant domestic supply chain. I need to understand how best my company could share beneficial ownership information or data in line with global reporting standards covering our network of suppliers and subcontractors so that we can demonstrate our commitment to effective governance.

Current technical setup

The current Open Ownership website – https://www.openownership.org – is a static site, generated by Jekyll and then served by Netlify. All text, resources and images are stored in GitHub and we use Siteleaf as a content management system. Our team would be happy to create Markdown versions of our reports and resources on Github.

Some existing data and pages are built via Python scripts which pull data from our organisational Notion account, via GitHub actions as configured in our GitHub repository.

All of our files and resources can be found in the Github repository for the website at https://github.com/openownership/openownership.beta. This is licensed under the terms of the GNU Affero General Public License.

In 2020, Open Ownership refreshed its visual identity which introduced a new logo, typography and colour scheme. We would like to continue using the current logo and colour scheme in line with our current brand guidelines but would be happy to change elements like the fonts or design vernacular to help us achieve our goals. We have also developed the Beneficial Ownership Visualisation System, and want to ensure that we can use or embed diagrams as detailed in this system on our website.

Open Ownership publishes all our resources and materials via openownership.org under a Creative Commons Attribution licence in line with our open ethos and established terms of use. We work in the open, so we want to use open source software to achieve our goals. This will be in line with how we license and publish our own technical development, primarily using the Apache 2.0 license.

The tender

Open Ownership is inviting applications to submit a tender for a whole service contract:

– To conduct user research;
– followed by the design and build of a website;
– which should use an open source content management system or open source tools to power the publication and sharing of our work.

We want to work with an experienced, skilled supplier with a track record of effective delivery who can help us to achieve our goals while following the Principles of Digital Development.

The initial research phase should take focus on user research and will inform an alpha design. We will use the remaining user research capacity to test approaches in the beta stage and guide the decision making on moving to live. The key groups for user testing align to the site's core purpose which is about allowing government, civil society and business to quickly access the technical resources they need. Discoverability on the site is an important improvement.

Open Ownership will own the digital output at the end of the programme and will be responsible for ongoing maintenance and hosting.

Budget

This project is not to exceed £45,500 GBP.

The essential skills needed are:

– At least five years' experience with website development using open source tooling;
– Demonstrable experience of running user research sessions to inform and refine development plans;
– Experience with website migration and transfer of hosting provider, if the technical elements of the build require it.

Desirable skills

– Experience of agile project delivery incorporating and iterating based on user feedback;
– Experience of creating multilingual websites incorporating translation workflows;
– Experience of developing website integrations using services such as:

  – Github
  – Jekyll
  – Notion
  – Transifex
  – Wagtail

How to submit a response to tender

Commercial details

The contracting party for this work will be Global Impact, the fiscal sponsor of Open Ownership. All quotes should be inclusive of VAT and other taxes. Proposals should clearly state the contracting party, which can be a company, agency, sole trader or individual consultant.

Timeline

Stage	Deadline
Deadline for submissions of tender	15 August 2021
Interviews	23 and 24 August 2021
Awarding of tender	3 September 2021
Start of project	1 October 2021
Final deadline for completion of project	31 March 2021

Content of proposals

Proposals should include at least the following elements:

–   An all-inclusive rate for completion of deliverables within the allocated time
–   Any applicable taxes
–   Description of proposed approach to the project
–   Description of how the user research will be conducted
–   Proposed contract term
–   Summary of experience of the agency or contractor with similar projects and at least three examples of similar projects completed within the past 18 months

Evaluation criteria

Proposals will be evaluated on the 'most economically advantageous tender' to find 'best value' for Open Ownership. 'Best value' means taking into account the optimum combination of whole-life cost and quality necessary to meet OO's requirements, and not simply initial costs. The split of the criteria will be:

–   Cost (40%)
–   User research proposal (20%)
–   Design experience and portfolio (20%)
–   Methodology of technical development (10%)
–   Product and service development cost (10%)

In your proposal, please indicate if and when you intend to subcontract with small businesses, minority-owned firms, or women's enterprises.

Contact details and closing date

The contact person for any questions and the submission of proposals is: Stephen Abbott Pugh, Data and Technology Manager, Open Ownership (email: stephen@openownership.org). All applications should be submitted before midnight BST on 15 August 2021.