

THE UNIVERSITY OF THE WEST INDIES

DIGITAL TRANSFORMATION PROJECT

TERMS OF REFERENCE

CONSULTANCY SERVICES FOR COMPLETING THE DEVELOPMENT, IMPLEMENTATION AND TRAINING FOR A ONEUWI STAFF PORTAL FOR THE UNIVERSITY OF THE WEST INDIES

1. BACKGROUND

1.01 The University of the West Indies (UWI) was established in 1948 and is the largest and longest-standing higher education provider in the English-speaking Caribbean. The university comprises five campuses, namely, the Mona Campus in Jamaica; St. Augustine Campus in Trinidad and Tobago; the Cave Hill Campus in Barbados; the Five Islands Campus in Antigua and Barbuda; and the Global Campus, which offers multi-mode teaching and learning services through virtual and physical site locations across the Caribbean region; and The UWI's Regional Headquarters (RHQ), located in Kingston, Jamaica, which houses the offices of the Vice-Chancellery, including the Chancellor, Vice-Chancellor, University Registrar, University Bursar, and the University Chief Information Officer. The UWI's mission is "to advance learning, create knowledge and foster innovation for the positive transformation of the Caribbean and the wider world."

1.02 As part of its modernization programme, The UWI has embarked on a digital transformation programme which seeks to assist in achieving The UWI's strategic goals as outlined in its Triple A Strategy (2022-2027). The digital transformation programme will enable a shared services operating environment which will allow The UWI to provide consistent and reliable services to all stakeholders. It will also enable the University to achieve greater operational efficiencies and economies of scale. As part of the digital transformation programme, The UWI requested support from the Caribbean Development Bank (CDB) for a regional UWI Digital Transformation Project to strengthen the institution's delivery of teaching, learning and research as well as its operational efficiency, resilience and global competitiveness. The UWI Digital Transformation Project will include, among other things, the provision of expanded and upgraded technology platforms for teaching and learning, the provision of hardware to support administration and management, and consultancy services to assist The UWI with harmonizing business processes.

1.03 A centralized staff portal is vital for fostering employee engagement and ensuring harmonized communications across the "One University" system. This platform plays an essential role as a focal point for all staff to access a wealth of resources, information, and opportunities for collaboration, ultimately enhancing their connection to the university community. By optimizing communication practices, the portal will break down silos and facilitate transparency, enabling staff across all campuses to collaborate effectively. By

roles-based access and customizations, it allows the institution to deliver relevant information tailored to individual staff needs while also serving the need for system-wide information sharing and communications, in real-time. This strategic initiative not only aims to enhance operational efficiencies but also to strengthen staff engagement and create a unified sense of belonging within the UWI community all aligned with the operational objective, AG2: Continue the development of a Creative, Caring, Accountable, Motivated, Professional (CAMP) Team, as a prime focus. It promotes transparent and cohesive communication as well as equitable delivery of an array of staff services to all university staff. This initiative can contribute to cultivating a highly engaged and informed workforce.

1.04 UWI digital transformation project will support the development, implementation and training for a OneUWI Staff Portal that will ensure transparency and harmony in the delivery of communication and services to all staff of the University across all its Campuses.

2. **OBJECTIVE**

2.01 The objectives of the consultancy are to design, develop, and implement a OneUWI Staff Portal that provides:

- (a) **Authenticated access** to internal resources, integrating with Microsoft Office 365 and allowing role-based access to authorized documents.
- (b) **Custom landing pages** based on the campus to which staff are assigned.
- (c) **Secure document handling**, including internal security protocols and measures against external threats.
- (d) **Centralized Information Access:** where staff can find necessary documents and updates, streamlining access to vital information and enhancing operational efficiency.
- (e) **Enhanced Communication:** between management and staff (at various layers and levels), leveraging features like announcements, newsletters, and forums, to foster transparency and strengthen the organizational culture. As an essential communication channel, it should provide prompt info dissemination to keep staff informed.
- (f) **Employee Engagement:** the portal should cultivate a sense of one UWI community and belonging, boosting morale and reinforcing the university's CAMP related values.
- (g) **Brand Alignment:** it must be a brand platform that facilitates staff alignment with the institution's overarching brand ethos, to the extent that it enables staff to exemplify and amplify brand principles and messages, as brand ambassadors in their own right.

- (h) **Training and Development:** featuring resources and onboarding materials support continuous learning and reflect The UWI's commitment to staff growth and development – professionally and personally.
- (i) **6. Feedback:** a pathway for integrating annual surveys and feedback tools like the staff engagement surveys and other feedback on policies and initiatives.

The consultant will also train designated staff to maintain and manage the portal post-implementation.

3. **SCOPE OF SERVICE**

3.01 The Consulting firm will carry out all technical studies, research, analyses, and related work required to attain the objectives described above.

3.02 The Consulting firm will be expected to:

(a) **Design and Development of the Portal**

- Create a centralized and unified web portal for all UWI staff across campuses.
- Integrate with Microsoft Office 365 for single sign-on (SSO) and secure authentication.
- Allow for custom landing pages and services tailored to specific campuses.
- Implement robust role-based access controls to protect sensitive information.

(b) **Standardization of Services**

- Identify and consolidate core staff enterprise services across all UWI campuses to and provide access based on campus of origin.
- Accommodate campus-specific needs where necessary without compromising the overarching uniformity of the portal.

(c) **Communication and Collaboration**

- Design a OneUWI Staff Intranet Home page to aggregate and display global news while allowing campus-specific communications.
- Facilitate integration with UWI's existing communication tools including campus new management systems

(d) **Data Integration and Security**

- Facilitate the secure integration of data and services from disparate campus systems into a centralized platform.
- Incorporate robust authentication methods, including multi-factor authentication (MFA), to protect user identities.

- Implement industry-standard encryption for data transmission and storage to ensure data privacy and security.
 - Design internal security protocols to safeguard access to sensitive documents and ensure compliance with data protection regulations.
- (e) **User Accessibility and Inclusivity**
- Ensure the portal design is responsive and accessible across all devices, including desktops, tablets, and smartphones.
 - Adhere to international web accessibility standards, such as the Web Content Accessibility Guidelines (WCAG), to ensure inclusivity for all users.
 - Provide multilingual support for diverse user demographics across the globe.
- (f) **Support and Training**
- Develop user-friendly training materials, such as tutorials, FAQs, and videos, to help users navigate the portal.
 - Conduct workshops for stakeholders, including administrative staff, to familiarize them with the portal’s functionality.
 - Define a helpdesk and technical support matrix for ongoing assistance post-implementation.

4. **METHODOLOGY**

4.01 The methodology of the Consultant will include the application of participatory research methods where relevant and include but will not be limited to desk review of secondary data; focus group discussions; and consultations. The Consultant is expected to work closely with staff at various levels of the university to gather information pertinent to the development of the OneUWI Staff Portal. The proposed approach for this Consultancy will include, but not be limited to the following tasks:

4.02 Review of documentation:

- (a) UWI Triple A Strategy 2022-2027.
- (b) UWI Brand Identity Manual

4.03 Project Planning & Kick Off

- (a) Establish a project steering committee with representatives from all UWI campuses and respective departments with responsibility for employee communications including but not limited to the Registry, HR & Marketing & Communications to provide oversight and strategic direction.
- (b) Develop a comprehensive project plan outlining objectives, timelines, deliverables, and resource requirements.
- (c) Organize a project kickoff meeting to align stakeholders on goals and expectations.

4.04 Stakeholder Engagement

- (a) Consultations with UWI's Vice Chancellery, UWI Marketing & Communications, UWI Web Team and other senior management and campus staff.
- (b) Conduct focus groups and workshops with key stakeholders (faculty, and administrative staff) to gather requirements and understand user needs.
- (c) Administer surveys and interviews to identify common pain points and prioritize features for the portal.
- (d) Create a stakeholder feedback loop to validate assumptions and refine requirements.

4.05 Technical Analysis

- (a) Perform a detailed gap analysis to evaluate existing systems and identify integration points.
- (b) Assess technical constraints and opportunities, including data structures, APIs, and middleware solutions, to facilitate interoperability.
- (c) Develop a comprehensive integration plan to unify disparate systems into a single portal.

4.06 Portal Development

- (a) Utilize Agile development methodology to enable iterative design, prototyping, and testing of portal features.
- (b) Establish sprint cycles to deliver incremental updates and improvements based on stakeholder feedback.
- (c) Conduct usability testing with a representative sample of users to refine the portal's interface and functionality.

4.07 Pilot Testing

- (a) Deploy a pilot version of the portal at one or more campuses to validate performance, usability, and system compatibility.
- (b) Collect and analyze feedback from pilot participants to identify issues and areas for improvement.
- (c) Address identified issues and incorporate enhancements into the final version of the portal.

4.08 Implementation and Handover

- (a) Roll out the portal across all UWI campuses in a phased approach to minimize disruptions.
- (b) Provide comprehensive training sessions for end-users and administrative staff to ensure smooth adoption.
- (c) Develop and hand over detailed documentation, including user manuals, technical guides, and a maintenance plan, to the OneUWI Staff Portal Management team.

4.09 Post-Implementation Support

- (a) Establish support mechanisms to address technical issues and user inquiries.
- (b) Monitor portal performance and user satisfaction to identify opportunities for continuous improvement.
- (c) Plan for regular updates and enhancements to keep the portal aligned with evolving user needs and technological advancements.

5. **INPUTS AND EXECUTING ARRANGEMENTS**

- 5.01 Through the Project Coordinator (PC), UWI will establish a OneUWI Staff Portal Management Team, comprising representatives from the Registry, Faculty and administrative departments, Campus IT departments and other relevant personnel. The PC will coordinate meetings with the OneUWI Staff Portal Management Team for the review of the Draft and Final Reports of the Consultant and will coordinate the submission of comments by CDB and UWI on the reports of the Consultant. The PC will make available all relevant policies, guidelines and other documentation required by the Consultant; assist with arranging meetings between the Consultant and staff and management of UWI; and will act as liaison between CDB and the Consultant.
- 5.02 The implementation will be anchored by virtual consultations with staff and management of UWI and other key stakeholders.
- 5.03 The OneUWI Staff Portal Management Team will be the recipient of the training under this consultancy and will be responsible for the continued support and maintenance of the portal following completion.

6. **REPORTING REQUIREMENTS**

6.01 The Consultant will report directly to the PC. The Consultant will be required to prepare and submit two copies (one hard copy and one electronic copy in Microsoft Word) of the following documents to UWI within the time periods indicated:

- (a) **Inception Report** providing details of the work programme, and the nature and intended timing of all activities to be undertaken in accordance with the Terms of Reference within two weeks of contract award.
- (b) **Draft Design** within four weeks following acceptance of Inception Report by UWI.
- (c) **Progress Reports** Monthly updates highlighting project milestones, challenges, and solutions. Include summaries of completed and upcoming tasks.

- (d) **Technical Documentation** Detailed system architecture and integration design. User manuals for staff, faculty, and administrators.
- (e) **Pilot Testing Report** Document findings from pilot testing, including user feedback and system performance.
- (f) **Final Report** Comprehensive overview of the project, including outcomes, challenges, and recommendations, including post-implementation support plan two (2) weeks after final sign-off.

7. **QUALIFICATIONS AND EXPERIENCE**

7.01 The consultant firm must have a minimum of 5 years experience in developing large-scale IT or digital transformation projects including developing and implementing a facility/campus Portal and training client staff for continued maintenance of the Portal. The firm must have successfully completed a minimum of two projects developing and implementing a facility/campus Portal and training client staff for continued maintenance of the portal of similar or greater complexity than the requirements set out in the Scope of Services. Any experience working in the Caribbean Region is beneficial and should be stated. Any experience working with universities, public bodies or on Development Bank funded projects would be an asset.

7.02 If selected to submit a Proposal, the Consulting Firm will be required to appoint a qualified team of key and non-key experts, as appropriate, to ensure the successful implementation of the assignment.

The Consulting Team must include a minimum of two (2) key experts, with the following roles, minimum qualifications and experience:

Key Expert 1 – Team Leader

The Team Leader shall possess the following minimum qualifications and experience:

1. Project Team Lead

- a. At least 7-10 years of experience in leading large-scale IT or digital transformation projects, preferably within higher education or multi-campus / multi-site environments.
- b. Demonstrated experience in developing and deploying web portals or enterprise systems with a focus on integration and user experience.
- c. Proven track record of working with diverse, multi-stakeholder teams and managing cross-campus collaborations.

- d. Relevant certifications such as PMP (Project Management Professional), ITIL (Information Technology Infrastructure Library), or Agile certifications (e.g., Certified ScrumMaster) are highly desirable.
- e. Exceptional leadership skills with the ability to inspire and guide multidisciplinary teams.

2. **Key Expert 2 – Web Development Specialist**

The **Web Development Specialist** shall possess the following minimum qualifications and experience:

- (a) Strong knowledge of web development frameworks, system architecture, API integrations, and data security best practices.
- (b) Familiarity with custom development integrations (e.g., APIs) with enterprise solutions
- (c) Expert experience with Microsoft Office 365 and SharePoint Online.
- (d) Excellent communication and interpersonal skills to liaise effectively with stakeholders at all levels, including staff, students, faculty, and administrators.
- (e) Strong problem-solving and decision-making abilities, with a focus on delivering user-centric solutions.

All team members are expected to possess the following:

- a) excellent coordination and communication skills.
- b) strong interpersonal and motivational skills and sensitivity to the regional and local environments as well as the ability to work with minimal supervision.

8. **DURATION**

The consultancy assignment is expected to be implemented over a period of 120 working days over a six (6) months duration.