REQUEST FOR PROPOSALS
TERMS OF REFERENCE
FOR A TECHNICAL ASSISTANT OF THE MIGAN PROJECT

Scope of the document	Définir le rôle et les objectifs d'une assistance technique à maîtrise d'ouvrage pour préparer le portail MIGAN
Document type	Cahier des charges
Arrangement	Conception site web / assistance technique
Indexation	
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TO :	Steering committee, webportal workgroup, for publication
Date of production	March-May 2012
Date de révision (gestion des versions)	
Version number	1
Sources	
Links with other documents	Règlement de consultation, cadre de réponse

1**. Context and issues**

1.1 Presentation of CARBICA, the contracting authority

CARBICA, the Caribbean Archives Association is a non-governmental association created in 1976 and gathers institutional and individual members of the Caribbean archival profession (National, territorial, university archives). The association was registered under the French law of 1901, in April 2006 in Martinique. It is managed by an Executive council elected by its general assembly. CARBICA is the Caribbean branch of the International Council on Archives.

Its aim is to federate the archivists of the Caribbean basin (including Belize, Surinam, French Guyana and Guyana). The association has presently over 30 members, in 25 English, French and even Spanish speaking states and territories of the Caribbean.

1.2 The MIGAN project

CARBICA is the carrier of the MIGAN project: "Caribbean archival network for shared memory": creation of a multilingual webportal to access historical resources kept in the participating countries of the Caribbean basin. MIGAN is supported by the European Union, through the Interreg IV Caribbean fund for cooperation. It is also supported by the International Council on Archives

Background and issues of the project

A shared history

The Caribbean countries, despite their insular dispersion and the multilingualism created by the colonial situation, have a common historical identity, based on migrations and cultural contacts with four continents, colonial plantation economy and slavery.

But a hardly accessible historical heritage

This eventful history is still to explore: the difficulty of access to the sources scattered between mother countries and different territories, between public and private actors, is a real obstacle to the development of researches in social studies but also to the construction of a collective memory, a "public history" serenely accepted.

Archival institutions to comfort in their specific and objective mission…

In the Caribbean area, National and territorial institutions dedicated to archives and records collection, preservation and communication are affected by a wide disparity of financial, technical and human means. Proactive but isolated initiatives still remain inconspicuous to decision-makers as well as to the public, whereas an efficient archives department is definitely a pledge of governance, in terms of transparency and guarantee of collective memory objectivity.

By introducing them into the global movement for digital cultural contents production (digital economy of knowledge)

UNESCO's directions, particularly those on Memory of the World and World Digital Library programmes, and International Council on Archives purposes, for archives field, foster the countries which have a common historical heritage to share it, notably thanks to Information Technologies.

Main issues thus are :

A necessary cooperation in the 21st century...to meet the global knowledge issues.

More than in other areas of the world, with old buildings close to research centres with a tradition of tools production and diffusion, the Caribbean Archives need to quickly make available their historical heritage to a researchers community, scattered all around the world.

To promote a substantial digital heritage

CARBICA's project is also supposed to take advantage of the convergence of initiatives supported by several members and already under execution (archives digitisation and online distribution, computerization of search tools, like in Martinique, Guadeloupe, Cuba and Trinidad). It is appropriate to rely on it in order to the Caribbean not be isolated from vast information systems concerning cultural heritage that are being set up, particularly in Europe and America (Europeana, Michael, Archivos ibero-americanos...) and not to restrict the opportunities to put on line this heritage, to bilateral programmes of cooperation with some former colonial "mother countries".

For a sustainable, fair and respectful of multilinguism cultural development

This background and the opportunities offered by the development of information and communication technologies allow to offset the geographical fragmentation and make now former projects of cooperation concerning archives become more realist: joint resources, cooperation to fairly develop the archival institutions, particularly those sin charge with national archives.

To valorize skills that are essential for a good governance and a sustainable and harmonious development of Caribbean societies

At last, through a visibility made available by the Internet, all the importance of archives professions for each nation will be promoted. That will be particularly uplifting for the authorities they depend on: the favour done to general public, which will require efforts as far

as professional training, archives buildings equipment are concerned, will be apparent and more easily evaluable by these authorities.

The main goals of the project are :

Indeed, it meets the following main objectives:
- Meeting social demand, expressed throughout Caribbean countries for access to knowledge of the past and its sources (family history, local history), which is a condition of sustainable and harmonious development of our Caribbean societies.
- Strengthening regional integration by promoting common cultural heritage, forged by common historical characters (sugar exploitation thematic, slavery, colonisation and decolonisation…)
- Compensating a geographical and linguistic fragmentation that impedes:
  o The development of the research in human sciences
  o The harmonisation of good professional practices in the field of archives and records management
- Providing the institutions in charge with archives, custodians of that memory, with the necessary means to complete their mission of communication and promotion of their heritage
- Promoting archives institutions and the skills and resources they have, in order the public authorities and the populations they serve to understand their great importance

The operational objectives are :

The objectives are twofold :
- regarding the target audience : access to an effective webportal with various contents
- regarding capacity building among the partners, and moreover among the whole archival community in the Caribbean, in the implementation of archival standards and the use of IT tools.
One will find on the website
- First, a multilingual directory of Caribbean archival institutions (including a standard description of their missions, their historical, institutional and legal background, their means and the main documentary resources they keep).
- Second, data bases and stores of historical sources kept by these institutions (collections of Caribbean interest, main collections on political and social history, iconographic collections, old press, genealogical sources…).
- General public publications and an interface of orientation to the resources already provided by partners websites.
- At last, administration, communication and training tools (extranet) for the partners of the project.

The webportal will meet the multilingual requirements, at least by the common use of English and French in its navigation, browsing and sear engine features, and in its main pages. Spanish and Dutch will also be proposed in the menus and in the search interface.
The webportal will also be compliant with the interoperability requirements and with the standards applicable in the European Union and at the international level (W3C) for such contents.

The project also aims at reinforcing efficiency of the skills of staff members in the partner institutions through :
- a training cycle

- methodological documentation.

Governance of the project

The project relies on a partnership between CARBICA and several archival institutions in the Caribbean, already members of CARBICA. Presently, the partners are : National Archives of Bermuda, of CUraçao, Surinam, Trinidad and Tobago, the University of Trinidad and Tobago, the Archives départementales of Guadeloupe and Martinique. Representatives of these institutions form the steering committee which defines and approves the guidelines of the project.

The project manager is Dominique Taffin, president of Carbica and director of the Archives départementales of Martinique.

The project manager is assisted by subcommittees dedicated to each aspect of the project (training, webdevelopement, partnership, standardization, digitization). The subcommittees are assigned to express the needs and prepare recommendations for action.

Other institutions might join in the project.

(see appendix 1)

Status of the project

The following steps have already be taken :
- detailed definition of the governance of the project and follow-up toos put in place
- a first survey for the feasibility of the project achieved
- a first test website, set up with the free and opensource software, ICA AtoM, designed to create the directory of archival institutions and the first descriptions of archival collections
- a training to the use of AtoM for partners

2. Purpose of the contract

This call for proposals, broken down into two lots, is in the context of the completion of the website MIGAN. The service is to ensure the project manager and teams in charge of the various facets of the project, technical assistance during each stage until completion of the web portal:
- Assessment of the current situation, data preparation and resources needed
- Development of the website
- Start of production
- Follow-up of the smooth running

As part of this objective, the consultant (also said technical assistant) will :

Confirmed order
- Gather in an assessment all the information necessary for the understanding and implementing of the common website for all institutions in the world archive of the Caribbean
- Examine the technical prerequisites for installing the production line and supply of the portal from the situation in each partner institution and write recommendations for improvement in terms of equipment, organization and will report any significant risk
- Drafting of specifications for the development of website
- Assist the project manager to examine tenders

Conditional phase
- Provide a compendium of best practices for each partner to prepare the data to feed in the portal
- follow-up the website development and will audit the compliance of the final delivery.

3. Details of the services to be supplied
3. Detail of the services(performances) to be supplied
First order
Make an assessement of current situation: the current situation will include necessarily:
- The summary of the main characteristics of the partner institutions (in term of status, funds and collections, public (to define the profiles and size of the public, their expectations, their staff), cultural activities (exhibitions, publications susceptible to be published online)
- The situation and means of production of finding aids: which software are in use (ACCESS, ICA-AtoM, ARKHEIA, GAIA, EXCEL); formats of the finding aids (word, EAD / XML, Excel…);
- The situation with regard to the digitalization and online publication : digitized(scanned) Archives Collections (size and weight of the images, the files of metadatas, size(format)); existence and characteristics of web sites (what consultation do they allow? Do they use the OAI-PMH protocol? Which are the specifications and what kind of interoperability could be set up between the existing websites and the target MIGAN website…

The consultant will have to appraise the compliance of the websites, the total size of the data to put online, and the human resource that each institution may dedicate to work on the MIGAN website. Special attention will be paid to their capacity for archival description, for web technologies, and for techniques to convert finding aids into EAD/XML, and also to the technical resources available in each institution (servers, software, information technicians).

For this survey, travels to each should not be necessary, as it is recommended to collect information through questionnaires or telephone interviews. Some part of the information might also be provided by the subcommittees and by the documentation on each institution already gathered by CARBICA on the occasion of the first survey. However, if necessary, the consultant will propose a list of the institutions he would visit. This service will be budgeted specifically and may be ordered by the contracting authority.

Collect the expectactions of each partner : do they have their own (or a governmental) policy about the use and publication of the information they keep, which is its scope, and what are the special requirements Do they want to put online standardized finding aids, digital images, exhibitions, publications? If they have no software for archival description, do they wish to implement ICA AtoM?

Propose orientations: before drafting the specifications, the consultant will necessarily exchange with the members of the workgroup to determine the guidelines of the website: consideration of the linguistic plurality, the establishment of a production line as simple as possible, in particular by means of ICA-AtoM, interoperability with the other relevant portals (BNPM, DLoC, Manioc, APEnet) warehouse for moissonnage (protocol OAI-PMH), graphic and layout standards, ergonomic browsing, sitemap, search engine and advanced search forms, display features, download and printing…

Write the specifications to contract a vendor for the development of the website: taking into account the situation and the approved guidelines, the technical assistant will submit its draft to the project manager and to the steering committee MIGAN that will validate or make amendments to the draft.

Produce a list of minimum requirements and a best practices handbook to be implemented by the partners to allow the smooth operation from production to the uploading or the harvesting of the data in the MIGAN webportal :

The consultant will then have to warn the project manager on the main risks and on the solutions to guarantee the compliance of the data provided by each partner with the requirements of the portal. He will deliver a first draft of best practices regarding the compliance of the data with the Dublin Core, and even the EAD/XML format, which are required for MIGAN.

Provide expertise in the choice of provider to be selected, ensuring that the requirements expressed in the specification have been addressed by the candidates. An analytical framework will first be established to allow a meaningful choice.

Conditional order
- Assist the implementation of the webportal until the final acceptance
Such assistance shall include:
- Advice to the project manager in its relations with the selected provider to develop the website,
- Participation (face or teleconference) at meetings organized by the project manager to validate the detailed functional specifications;
- The organization of functional testing of the portal. The tests will be performed by the partner institutions within a framework provided by the consultant.

- Update and provide each partner with a personalized set of best practices to control the production line ; this handbook will be based on the first version provided at the end of the assessment and will be updated according to the chosen tool for the portal. It will be delivered no later than the time of final acceptance of the portal
- Audit the quality of provision in relation to project objectives and standards and international recommendations on production and on-line finding aids and archives (within 6 months after commissioning)

4. Expected deliverables
First order
- A detailed schedule of the course of providing the service after the kickoff meeting
- An assessment per institution, according to a audit matrix validated by the project manager
- A synthetic diagnosis, presenting in a matrix strengths and risks that could affect the project
- A first draft of best practices handbook for structuring data
- Guidelines for the drafting of specifications
- A specification for the design and implementation of a portal MIGAN and response framework for bidders
- A report analyzing the bids of the tenderers
- As needed, progress reports and warnings

Conditional order
- E-mail messages in response to questions asked by the project manager
- As needed, progress reports and warnings
- A checklist or framework document for the organization of the tests
- Best practices adapted to each institution to prepare, share of upload contents in the webportal
- A final audit report on the operation of the portal (6 months after commissioning)

5. Timeline for service

The consultant will provide his services in a period of 15 weeks for first order, then no more than 12 months for the conditional order.

The period of performance of the services is aligned with the global implementation schedule, and will be detailed by the provider in a work plan for submission to the sponsor. The work plan must be provided within two weeks from the notification of award.

6 Standards and conditions to be met by the consultant
By submitting his (her) bid, the technical assistant will
- comply with the norms and standards of the International Council on Archives, the recommendations of W3C and the French guidelines for accessibility and interoperability, recommendations for the online cultural content of the European Union (downloadable from the website of the French Ministry of Culture and Communication)
- take into account the use of several languages within CARBICA: the main working language is French (including relations with the project manager and the chair of the working group for development of the portal), but the deliverables will be provided in French and English. It is strongly desired that the technical assistant can speak both French and English
- comply with financial rules issued by the European Commission for the INTERREG IV Caribbean.
- agree with the general terms of service for consultants : confidentiality and privacy
- agree with the rule of independence with the vis-à-vis suppliers of software solutions within the scope of the project
- consider the legal frameworks of the project partners
- respect the identity of CARBICA and the values of the association, as promoted through the MIGAN project
- respect intellectual property rules in accordance with French law applicable in Martinique.

7. Commitments of the contracting authority
CARBICA appoints one or several interlocutors within its organization who will watch to supply to the consultant the information held by CARBICA necessary for the execution of his (her) service, and to raise to the steering committee elements to validate. By default, this interlocutor is the project manager of MIGAN.

The contracting authority provides the consultant with the project documents and all the information already collected (see appendix 3 and 4).

8 Reception of the services
The decision by the contracting authority of reception, postponement, reception with allowance or rejection(discharge) of the deliverable documents has to intervene before 6 weeks as from the date of the acknowledgement of receipt by the MIGAN project manager of the deliverable to be received.

If this decision is not notified to the holder within the deadline above, the service is considered as received.

9. Terms of payment and late charges

The prices are firm, shall not be revised nor updated. No advance payment is made. Partial payments can be made according to the progress of the services, as deliverables will be sent and approved.

In case of delay in the delivery of the reports, the holder undergoes on his claims, penalties the amount of which a day of delay is fixed to 100 euro.

Apppendixes
App. 1 : organizational chart of the project
App. 2 : detailed list of the MIGAN partners
App. 3 : list of the information already available to be provided by CARBICA
App. 4 : model of the survey already filled in by the partners
App. 5 : general project document of MIGAN