



USAID | PHILIPPINES

FROM THE AMERICAN PEOPLE

REQUEST FOR QUOTATION

Solicitation 72043820Q00001

Posting Date: November 25, 2019

USAID/PHILIPPINES on behalf of the United States Embassy in Mongolia is soliciting quotations from qualified local/ Mongolia-based IT professional/firm to develop and deploy a sustainable cloud-based technical architecture in Mongolia (Bi-lingual in English and Mongolian languages).

All responsible sources may submit a response which, if timely received, shall be considered by the agency. A Purchase Order (P.O.) will be awarded to the selected vendor.

Electronic copies should be submitted to the Contracting Officer, Executive Office, USAID/Philippines (email address: philippinesmanilaexopsd@usaid.gov) by December 26, 2019 at 3PM (Philippine Standard Time).

Detailed information about this solicitation is included herein.

Note: For all actions which are over \$25K, prospective vendors must be registered within the Central Contractor Registration (CCR) which is now under System for Award Management (SAM). Refer to this site for details on the registration process:

https://www.fsd.gov/fsd-gov/answer.do?sysparm_number=KB0012240

Signed: Original Copy
Thomas G. Bayer
Contracting Officer

Statement of Work

- I. **Title:** Services of a qualified local/ Mongolia-based IT Professional/Firm to develop and deploy a sustainable cloud-based technical architecture in Mongolia; Bi-lingual English and Mongolian
- II. **Period of Performance:** January 15, 2020 to June 30, 2020; Six (6) months intermittent
- III. **Technical Direction:** Executive Office (in consultation with U.S. Embassy Ulaanbaatar, United States Trade Representative, and the United States Agency for International Development
- IV. **Performance Work Statement**

1. Background

The Government of Mongolia’s full implementation of the provisions of the Agreement on Transparency in Matters Related to International Trade and Investment between the United States of America and Mongolia (henceforth referred to as the “Transparency Agreement”) relating to rulemaking will substantially improve economic governance and foster the development of Mongolia’s economy by giving the private sector, civil society, and NGOs the opportunity to shape the rules that govern them. Aside from closing off opportunities for corruption, the uniform use of public comment periods on a centralized website for all ministries and agencies will help interested parties throughout Mongolia and in other countries provide their input on rulemaking that affects their interests, which will help promote a more open international trade and investment climate in Mongolia.

2. Product Vision

USAID is soliciting a Contractor to design and develop a new modernized, consolidated information technology platform for the Government of Mongolia that allows it to meet the rulemaking terms of the Transparency Agreement.

The platform will provide an enhanced version of the legalinfo.mn website and mobile application (henceforth together referred to as “new legalinfo.mn”) which will serve as Mongolia’s “single journal of national circulation” for the publication of all final measures relating to international trade and investment and for the handling of public comment periods for all proposed measures relating to international trade and investment consistent with the provisions of the Transparency Agreement.

The new legalinfo.mn will provide transparency into the Government of Mongolia rulemaking process and improve operations by serving as the portal for all ministries’ and

agencies' publication of final laws and legal documents, including those relating to international trade and investment, and handling of public comment periods for all proposed measures relating to international trade and investment via that website, consistent with the provisions of the Transparency Agreement. The website and accompanying app will enable its administrators to easily gather public comments received on a proposed measure and allow the relevant ministry or agency responsible for them to address significant comments received and explain substantive revisions made to the proposed measure, consistent with the provisions of the Transparency Agreement.

In addition, the new legalinfo.mn will provide increased functionality, modern cloud-based technical architecture and be designed to be fully sustainable by the Government. On completion of this order, USAID envisions that the new legalinfo.mn will be deployed to all relevant Government of Mongolia ministries and agencies as well as to the general public under the direction of the Ministry of Justice and Home Affairs (MOJH) and the National Legal Institute (NLI).

The new legalinfo.mn will:

- 1) Be designed and built in a cost effective and sustainable manner to allow the National Legal Institute of Mongolia (NLI) to maintain and manage for the life of the system.
- 2) Serve as the Government of Mongolia's official consolidated online legal database that includes the full texts of acts, laws and other legal norms from government authorities.
- 3) Provide the functionality for the standardized posting draft/proposed measures, collecting public comments on the measures and allowing the relevant ministry or agency responsible for them to address significant comments received through posting the explanation of how comments were adjudicated.
- 4) Include integration with social media platforms, improved functionality (i.e. search, version history, business rules, performance capacity, etc.) and comply with all Government of Mongolia security and privacy requirements.
- 5) Will be developed following an agile methodology, user-centered design best practices and research principles that focus on addressing prioritized needs of key user groups within the Government of Mongolia and external customers and stakeholders.

3. Requirements/Tasks

This section of the document addresses specific capabilities and objectives the Contractor is expected to meet and establishes guidance behind the development methodology that USAID believes will provide for the best new legalinfo.mn product by the conclusion of the contract.

3.1. User research, design, product strategy

USAID requires the contractor to conduct user-experience and visual design support services to achieve the objectives listed below, using best-practice product design and research methods, in order to provide quality design solutions. There are five objectives specific to user research, design and product strategy. They are:

3.1.1. Objective 1: Understanding business and user needs (Discovery).

Uncover the needs, opportunities, and constraints of users who will rely on the new legalinfo.mn.

The following activities may be necessary to achieve this objective:

- Stakeholder and user interviews
- Usage analysis of existing legalinfo.mn and mobile app
- User role and task analysis
- Personas, scenarios, journey maps, and other artifacts to capture, share, internalize and externalize learnings

High-Level Acceptance Criteria:

1. The user interviews are conducted across an acceptable representative sample of all legalinfo.mn stakeholders.
2. Representative personas are created for all major user groups of legalinfo.mn. At a minimum, these personas shall include NLI administrative users, Government of Mongolia internal administrators, and public external users.
3. User roles and tasks are accurately documented for all major user groups.
4. Artifacts are created and shared for all objectives and iterated upon as needed through the life of the project.
5. Users, NLI and USAID can easily access, share and comment on artifacts.

3.1.2. Objective 2: Establish design solutions.

Provide design solutions for information architecture, workflows, pattern libraries, language, visual design, and overall system performance, and upcoming functionality as prioritized by the Product Owner (NLI).

The following activities may be necessary to achieve this objective:

- New information architecture and navigation strategy.
- Sketches, wireframes, clickable prototypes, final feeling “mock-ups” as needed.
- Impromptu and/or frequently scheduled “design spikes” with developers to implement solutions in a low documentation, highly agile way
- QA as part of user story acceptance criteria
- Periodic task-based usability testing

High-Level Acceptance Criteria:

1. Clickable prototypes of the proposed solution are made available to users as soon as feasible, and regularly updated following the sprint cycle.
2. System performance measurements are proposed by the Contractor and accepted by USAID.
3. Wireframes, sketches and early mock-ups are created with user input through Design Studios and user research.
4. A new information architecture and strategy is proposed and documented by the Contractor, and accepted by USAID.
5. User stories are reviewed and accepted by USAID. An independent QA review of the user stories is conducted and found acceptable by USAID.
6. Regular task-based usability testing is held in accordance with sprints.
7. Usability problems are regularly captured, reported, and proposed and fixed within regular intervals, depending on severity, during sprint cycles.

3.1.3. Objective 3: Develop user stories for product backlog.

Frame design solutions as epic and user stories (as per agile methodology as described in the following section) for the Product Backlog, which shall be prioritized according to the Product Owner.

The following activities may be necessary to achieve this objective:

- Attend Product Roadmap planning meetings
- Attend Iteration planning meetings, daily standups, and retrospectives (in-person or remotely by phone or video)

High-Level Acceptance Criteria:

1. The Contractor designs the product roadmap and provides to USAID for acceptance.

2. Following an agile methodology, Contractor leads and documents daily standups, retrospectives, and iteration planning meetings. Documentation is shared widely with USAID personnel and others as determined by USAID.

3.1.4. Objective 4: A consistent and intuitive front-end user experience.

Work with development team to create or adopt pattern libraries and a modern-build front end User Interface (UI) that performs excellently and can be modified with relative ease. Pattern Libraries increase design and interaction consistency across the system and allow developers to better implement wireframes. They are also an assurance of accessibility if components in the library are built to accessibility guidelines. The U.S. Web Design Standards (<https://playbook.cio.gov/designstandards/>) is an example of such a library.

The following activities may be necessary to achieve this objective:

- Work with development team to determine ability to implement
- A “design spike” with developers to fine-tune component appearance and behaviors
- Assist in QA and acceptance of changes on a user story basis

High-Level Acceptance Criteria:

1. The Contractor regularly provides a demonstrable, accessible user-interface that is viewable by all stakeholders throughout the project’s duration.
2. The Contractor provides a mechanism to regularly solicit feedback and address issues uncovered by the user throughout the project’s lifecycle.
3. The Contractor completes regular QA and testing of the interface, tests and verifies assumptions about user behavior through regular user testing, and documents findings.
4. The Contractor follows established guidelines and industry best-practices where applicable.
5. The front-end UI is developed in tandem with the backend system, and the two remain complementary throughout the duration of the project.

3.1.5. Objective 5: Usability testing.

Conduct regular periodic usability testing with primary users to validate quality and direction of design decisions.

The following activities may be necessary to achieve this objective:

- Draft interview scripts
- Travel to conduct on-site, task-based usability tests

- Conduct remote tests. (Ideally usability testing is tied to sprints, which are usually two weeks in length.)
- Synthesize results and socialize them with the rest of development, product, and design teams

High-Level Acceptance Criteria:

1. User interviews are conducted and documented.
2. Usability testing is conducted and findings are synthesized.
3. Usability testing findings guide the development of legalinfo.mn.
4. Remote tests validate that legalinfo.mn meets the needs of users, and are conducted throughout the development cycle.

3.2. Technical architecture requirements

USAID requires the Contractor to develop a technical architecture following agile methodology for the new legalinfo.mn with significant flexibility to accommodate future changes in underlying infrastructure, Government of Mongolia business processes and policy, and development of additional requirements. The technical architecture should comply with the intent of guidance found in the U.S. Digital Services Playbook (<https://playbook.cio.gov>) and best practices in IT. This will help to maximize the flexibility of the system and allow for the incorporation of new features and emerging technologies throughout the duration of the contract. While all 13 principles of the playbook are applicable, the following principles directly reflect areas of specific importance for this award (numbers correspond to the playbook):

1. Understand What People Need
2. Address the Whole Experience from Start to Finish
3. Make it Simple and Intuitive
4. Build the Service Utilizing Agile and Iterative Practices
8. Choose a Modern Technology Stack
9. Deploy in a Flexible Hosting Environment
11. Manage Security and Privacy through Reusable Processes
13. Default to Open

Objectives six through ten are related to technical architecture requirements. They are:

3.2.1 Objective 6: Assess and develop a solution taking into account the current state.

The Contractor’s solution shall take into account the functionality resident within legalinfo.mn today which meets existing user needs and incorporate it into the

system proposed to meet these requirements. The Contractor will use iterative agile software development processes to break down and analyze all pre-existing business processes, work flows and user interfaces, and where necessary revise, streamline, improve, add or delete elements to ensure the best possible experience for users while still satisfying all necessary technical requirements. Automated tools shall be used where necessary and include backout capabilities.

A primary function of the system environment is to create the public posting and comment functionality that ultimately provides the proof of the implementation of the Transparency Agreement.

The following activities may be necessary to achieve this objective:

- Analyze existing business practices and workflows
- Deploy legalinfo.mn to Government ministries and agencies and provide initial support to ensure smooth transition
- Create business rule enforcement and reports for ease of use

High-Level Acceptance Criteria:

1. Successfully design and deploy system environment to support legalinfo.mn public comment functionality, and provide scalable solution capable of supporting future iterations of the Government business processes.
2. Successfully deploy legalinfo.mn to 100% of government organizations identified by USAID.

3.2.2 Objective 7: Develop the system under an agile methodology.

The objective of developing a system under an agile methodology is to reduce the risk of failure by getting a working system into the hands of users quickly that effectively meets user needs, and provide frequent opportunities for the Contractor to adjust requirements based on user feedback. An agile methodology will provide an opportunity to automatically test and deploy a working system to include new features easily and often.

Working with USAID and the Product Owner (NLI), the Contractor will develop a product roadmap that supports the delivery of the working system under distinct phases as outlined. NLI will assume the role of Product Owner and will be the integral part of the agile process and User Acceptance Testing.

The Contractor shall over the course of this award provide the deliverables detailed under the discovery phase, alpha phase, beta phase and live launch.

3.2.2.1 Discovery Phase

During the discovery phase, the Contractor, NLI and USAID will establish the preferred infrastructure and solution that will provide the greatest value. The Contractor will establish who the users of the system are and what the real requirements are. That information will be used to frame the building of a system that will meet the user's needs as well as those of other stakeholders.

During discovery, assumptions will be tested to ensure that the system meets the needs of the users. USAID reserves the right following incremental phase releases to adjust the required functionality in order to better support the overall mission as required, following an agile methodology. Such changes will be approved by the Product Owner and the COR.

3.2.2.2 Alpha Phase

During the Alpha Phase prototypes will be tested with small groups of actual users. The Contractor will work closely with designers and developers to implement prioritize change requests and implement changes based on user feedback. Frequent releases will be planned to allow for regular review by small groups of testers. During this phase, the Contractor will identify, document and plan for technical and design needs that affect future phases.

3.2.2.3 Beta Phase

The system will be staged and tested for use by a larger subset of the target audience. Changes will continue to be implemented based on user behavior and feedback. Any policy compliance issues and technical integration issues will be resolved. Metrics for continually monitoring and improving the system will be developed and tracking systems implemented.

3.2.2.4 Live

Once the system goes live, it is available to all users. The system at this stage includes the necessary security, performance and policy requirements, including securing the final approval to deploy. The site is continually improved based on the analytics and user feedback. The Contractor shall ensure all core capabilities of the system are live and in production.

The following activities may be necessary to achieve this objective:

- Develop and manage sprint cycles to move from discovery to alpha to beta to live
- Constant monitoring of user feedback and collection of analytics.

High-Level Acceptance Criteria:

1. Application has met all necessary security, performance and policy requirements.
2. Approval to deploy has been granted.
3. All core capabilities are satisfied with Live launch.
4. Baseline metric requirements are met on a continual basis.

3.2.3 Objective 8: Deliver the system’s core functionality.

Section 5 in this document outlines specific delivery constraints that will help ensure the system meet all the requirements identified here. This section defines core functionality of the system.

The Contractor shall propose a “definition of done”, which will be a list of criteria that must be met before user stories, and the associated system functionality is accepted as a deliverable.

The following activities may be necessary to achieve this objective:

- Collect, document, and vet core functionality with NLI and USAID
- Enhance following user story criteria until the “definition of done” is met

High-Level Acceptance Criteria:

1. Core system requirements have been delivered and requirements satisfied.

3.2.4 Objective 9: Satisfy all business rules.

Business rules provide specific system functionalities that are needed to support various operational requirements and enforce any limitations. Any system should be capable of handling new business rules as they are identified necessary.

The following activities may be necessary to achieve this objective:

- Collect, document, and vet business rules with NLI and USAID.

High-Level Acceptance Criteria:

1. All business rules have been identified and satisfied.

3.2.5 Objective 10: Continually test, evaluate, and improve the system.

The Contractor shall continually test (including load testing) and evaluate through all phases of the development cycle for the system. This will include the preparation of test plans and procedures, design test cases, conduct tests, witness tests and provide technical support, coordinate test plans in accordance with appropriate

regulations, and analyze / evaluate / document test results. Tests shall be refined throughout the development cycle and results shared with USAID.

The Contractor shall participate in technical analyses, code reviews and other reviews as required. Code shall be available to USAID technical personnel and / or third parties identified by USAID for regular code review. Automated testing will be utilized to the greatest extent possible in the design, build and operations of the system. The Contractor shall provide testing activities in support of continued development, enhancement, and deployment of capabilities within an agile development methodology.

The Contractor shall provide support to develop, execute, and track all testing efforts to support the end-to-end development, deployment, and maintenance of the solution and shall work with designated USAID Subject Matter Experts to develop, enhance, and maintain the necessary testing artifacts, including test plans, test procedures and test scripts for all releases required during this Period of Performance. These testing artifacts shall be produced for each of the defined test types/milestones supporting the system as may be applicable to the functionality delivered and/or the impact to the production environment.

The following activities may be necessary to achieve this objective:

- Develop and modify test plans and other artifacts
- Automate testing, understand and prepare for all criteria prior to launch
- Prepare test scripts
- Regularly report findings and make adjustments as necessary

High-Level Acceptance Criteria:

1. The Contractor has successfully developed a system to support and maintain the minimum requirements.
2. Tests and test cycle results satisfy project requirements.
3. Contractor has secured necessary requirements prior to release to a production environment.

3.3. Develop New System

Process Requirements Overview:

1. Follow an agile software development methodology with short, regular sprints;
2. Deliver work product at the end of each sprint;
3. Work with USAID and Product Owner (NLI) to evaluate results to inform work of subsequent sprints;

4. Engage with users through focused user studies to understand the needs and opportunities for engagement through the project;
5. Include the active participation of NLI product manager and principal users and stakeholders of the software;
6. Lead the collection and synthesis of end-user feedback on potential designs and delivery implementations.

3.3.1. User-centered design/development

The contractor shall use modern user-experience design practices (e.g., usability testing), to ensure that NLI is building the right system from the user’s perspective, and to be able to make course corrections, as needed.

The contractor shall capture requirements in a user-story format, using the following framework: “As a [USER], I want [REQUIREMENT], so that/to [VALUE PROPOSITION].”

Users shall be incorporated into product development to ensure customer input in the system design, features, capabilities and functionality. Users will be integral to setting the development priorities of the system.

The Contractor shall measure how well the system is meeting the needs of the users, including the creation and monitoring of metrics that the Contractor and USAID will use to assess user acceptance, and areas that need improvement. The Contractor shall develop tools to support these objectives, including a transparent feedback mechanism for users to report issues directly to USAID and the Contractor.

On occasion USAID may utilize other third parties to evaluate and analyze system performance. The contractor may be requested to evaluate and / or implement suggestions made by such parties.

3.3.2. Agile delivery

The contractor shall use agile management best practices (e.g., story-point estimation, velocity measurement) for estimating, planning, managing risk, and communicating status, to enable the effective management of the project team, along with user and product-owner expectations as to what will be done and by when. The process should also enable immediate course corrections when the team isn’t performing at the highest levels possible, or if project priorities shift; and maximize the likelihood of overall project success in terms of cost, schedule, quality, and value.

The contractor and product owner shall define and adopt user-acceptance criteria for user stories.

3.3.3 Transition to Operations and Maintenance

The contractor shall be responsible for the transition to the National Legal Institute (NLI) for operation and maintenance.

The contractor shall recommend best practices and standards for the system. While developing the system the contractor shall maintain an up-to-date log of operational events, library of documentation, maintenance of operational monitoring and management tools, operational scripts and procedures, and other such items.

3.3.4 Training

The Contractor shall be responsible for ensuring that NLI and system users are fully empowered to adopt the new system. Software should be simple and intuitive to use with minimal need for specialized training. For instances where training is necessary, this shall include “train the trainer” training.

3. Business Rules

Under this order, the contractor shall ship a beta-version of the new legalinfo.mn, consistent with the requirements under section 3, within 90 calendar days from award.

At the beginning of each sprint, USAID requires the contractor to engage in sprint planning meetings, identify appropriate user stories for the sprint, and establish user-acceptance criteria for the user stories. During the sprint, the contractor shall create working software to meet the user stories.

USAID requires that the contractor will generate comprehensive and complete documentation, provide artifacts, and create new user stories based on the sprint.

Business rules provide specific system functionalities that are needed to support various operational requirements and enforce any limitations. Any system should be capable of handling new business rules as they are identified necessary. In order to follow an agile process, enough specificity and flexibility must be combined in defining the business process rules to allow for the creation of the best possible outcome and solution.

The solution will provide:

1. A system that provides public comment functionality to achieve compliance with the Transparency Agreement;
2. The selection of an appropriate content management and website maintenance platform and set of development tools;
3. IT security and other authorizations required to ensure that the software can be made available for live deployment;
4. Training materials relating to the system and its use for users, including “train the trainer” materials;
5. Provide maximum portability and consistency of all data contained within the system;

6. A process and tools for migrating data from the legacy legalinfo.mn system;
7. Incorporate robust design/hardware/software features to maximize system “up time” while minimizing potential for loss and / or the corruption of system data;
8. Maximize system processing / throughput capacities to accommodate high simultaneous usage levels;
9. Deliver data more openly for public consumption;
10. Provide website analytics and reporting;
11. Provide users with a way to tag entries based on user-defined categories;
12. Provide for uniform and consistent presentation of data regardless of the originating system;
13. Social Media integrations, i.e. Facebook and Twitter;
14. Reduced operational complexity through adoption of a cloud-native technology platform that provides worldwide access and the ability to flexibly meet capacity and growing demand;
15. Continual backup and recovery for improved reliability;
16. Sustainable and affordable cost of operation;
17. Business process rules that validate data and provide form field validation;
18. Enhanced search functionality and version control;

4. Constraints and Assumptions

The following constraints and assumptions are applicable to this Task Order:

- The requirements gathering and design effort will be for both the legalinfo.mn website and a mobile application (defined as “new legalinfo.mn”);
- An employee of the National Legal Institute (NLI) will serve as the Product Owner;
- The contractor will consider cloud solutions first before other infrastructure solutions;
- Requires compliance with all Mongolian laws, regulations, policies, and procedures as they apply to MOJH/NLI and the requirements for legalinfo.mn;

- The scope does not include data migration from the old legalinfo.mn site;
- MOJH and the NLI are responsible for the data migration from the old legalinfo.mn site and may contract independently with the vendor to facilitate this migration;
- MOJH and the NLI are responsible for coordination for stakeholders within the Government of Mongolia (*3 sources Ministries, Parliament and Presidents office*);

5. Period of Performance

Date of award through 180 calendar days, with one 180-day option period for a production legalinfo.mn system.

6. Place of Performance

The place of performance will primarily be at the Contractor’s work site in Mongolia.

7. Security and Operational Requirements

The contractor will follow all Government of Mongolia defined compliance requirements for information security and privacy protection as well as generally accepted best practices.

7.1 Disaster Recovery and Continuity of Service

The contractor shall design the system to be maintained in a manner that reduces risk, enables the restoration day-to-day services and minimizes system downtime. The contractor shall provide a disaster recovery plan. The disaster recovery plan shall cover a range of scenarios and plans for each. Services may be required during any timeframe from initial declaration of a disaster to final recovery of all business processes and business functions.

V. Deliverables and Payment Terms

a. Deliverables

Description of Deliverables	Due Date	Percentage
3.1. Conduct and Present User research, design, product strategy	January 31, 2019	20%
3.2. Develop and Deliver Technical architecture requirements	February 14, 2019	20%

3.3a Develop New System: Beta Version of New Site delivered	March 15, 2010	30%
3.3b Develop New System: Production Version of New Site delivered	June 30, 2019	30%
TOTAL		100%

b. Payment Terms

USAID/Philippines will process the payment once the short term provider has submitted a letter requesting for payment/invoice, duly accepted and signed by the Executive Office (EXO) to signify that the required deliverable/s have been completed as described above. Payment shall be made through electronic fund transfer (EFT).

VI. Submission Process

Interested individual/firms should email electronic copies of the following to the Contracting Officer, Executive Office, USAID/Philippines (email address: philippinesmanilaexopsd@usaid.gov) by December 26, 2019 at 3PM (Philippine Standard Time):

- (1) A letter of interest indicating capacity and experience;
- (2) A Curriculum Vitae outlining professional background and experience of the Lead IT Professional;
- (3) Three recent references
- (4) A VAT Exempt quotation (including professional fees/labor and materials, cost related to travel, per diem, and accommodations).

VII. Contract Type

This will be a Firm Fixed Price Purchase Order within the Simplified Acquisition Threshold of USD 250,000.

VIII. Systems Award Management (SAM) Registration

Prospective vendors must be registered within the Central Contractor Registration (CCR) which is now under System for Award Management (SAM). Refer to the attached guides or this site for details on the registration process: <https://sam.gov/portal/SAM/###11>