

UNPRI Extranet

Invitation to Tender

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Introduction

We are looking for an agency to create an interactive and attractive website for our members. The website will be a password-protected 'extranet'.

Background to UNPRI

The Principles of Responsible Investment Project is an investor initiative (non-profit organisation) in partnership with the United Nations Environment Programme Finance Initiative and UN Global Compact. The PRI aims to help investors in their efforts to integrate environmental, social and governance issues into investment decision-making and ownership practices.

The core activities of the PRI include:

1. Increasing awareness of responsible investment;
2. Supporting signatories in their implementation through information provision and research;
3. Networking signatories and promoting collaboration.

Correct on 1 March 2010, there were more than 700 institutions (e.g. Pension funds, investment managers, professional service providers (research and data providers) that were 'signatories' to the PRI. Of these 700-member organisations, the PRI counts around 2600 contacts (potential individual users of the extranet) on record. (The next five years will see a projected growth in these figures).

Current websites

The PRI's current online presence includes:

1. A public website (using basic php templates and outside the scope of this tender) at <http://www.unpri.org>;
2. A basic extranet (to be completely overhauled, forming the mainstay of this tender) at <http://intranet.unpri.org> (password-protected);
3. An academic network (partly public, partly available to extranet users, to be overhauled and subsumed under the new extranet) at <http://academic.unpri.org>;
4. A research database (known as the 'ERP,' available to extranet users, created recently and working well, that will need to be linked to the new extranet) at <http://research.unpri.org>;
5. A Salesforce CRM database which contains data about all extranet users and will need to be tied to the new extranet.

Audience

The PRI's core audience is investment and financial service professionals.

Users of the extranet include groups, each with their own permissions and access levels; although this may change and we envisage having the ability to set up and edit these groups and subgroups.

1. Signatories (subgroups include investment managers, asset owners, service providers)
2. Public 'Members'
3. PRI Staff
4. General Public

Each of these user groups, including the subgroups of Signatories, will have differing access and permissions. For example: Signatories may view the entire extranet, Public 'Members' belong to and can view only the Academic Network, the General Public may view details about Events and a small public part of the Academic Network, and PRI Staff can manage all.

Objectives

The aim of the new extranet is to:

1. Provide our members with regularly updated advice and guidance on how to be a responsible investor in an easy-to-digest format;
2. A landing page that allows PRI staff to promote key messages and projects at different points in the year;
3. Organise large amounts of information – much of it interlinked and with overlapping connections – in a way that is easy for our members to search and navigate. Navigation should be intuitive and steer our members towards other relevant content whenever possible;
4. Encourage our members to 'get involved' in various initiatives, collaborations and actions listed on the site. This may on occasion need the facility of allowing members to sign up to ad hoc email updates on new postings on a particular topic;
5. Provide a 'forum for debate' in places and opportunities to share knowledge and access new ideas. Foster a 'community' dynamic which encourages greater involvement, sharing of opinions commenting;, etc.
6. Provide an option for smaller subgroups to form and then share work flows and communicate online;
7. To share our corporate look-and-feel and be an attractive website;

8. Provide detailed and useful real-time analytics for PRI staff and administrators. Gather and organise in a meaningful manner visitor numbers, participation levels and ability to analyse how PRI projects and campaigns are performing against their key performance indicators.

Site Map

Home

Dashboard

- > News and requests from PRI
- > Pages/Files I've worked on
- > Edit my preferences / email notifications / login and contact details

Clearing House

- > Category Landing Pages (highlighting newest posts)
 - >> List of Posts
 - >>> Individual Post
 - >>>> Working Group Section

Implementation Support & Work Streams

- > Principle by Principle support Pages
 - >> Individual Content Pages
- > Stream Landing Pages
 - >> Individual Content Pages

Academic Network

- > Member Directory
 - >> Member Profiles
- > Research Database, browse and search
 - >> Individual research items, comments
- > Digest Pages
- > Research Pages
- > Other Content Pages

ERP Research Database (link to separate site)

Signatory Reporting & Assessment

- > Some Content Pages
- > Assessment Form, upload your report
- > Assessment Database, browse and search
 - >> View individual signatory assessment results and/or annual RI reports

Proxy Votes Database

- > Browse and search database
- > Update an entry

Events

- > Calendar, Browse Archive, Sort by type of event (webinars, in-person events)
- > Individual Event pages (agenda, speakers, link to registration / payment)

Document Library

- > Search and browse all documents on the intranet
- > Upload a file that isn't connected to a page on the intranet but you still want to upload

Features

A. My Account

Every extranet user will need an account made up of their login credentials and some basic details such as email address, contact number, job title

The user database will be connected with a separately managed Salesforce CRM database. For example, if a user changes their Job Title or Company on the extranet, then this should be synchronised back to Salesforce.

Registration is open to anyone but users will need approval from PRI staff; mostly done by checking their details against current Salesforce records, so any ideas for easing this process are welcome. We also would like you to flag up any issues there might be with security and spam. As above, users' latest details are synchronised back to Salesforce to keep our records there up-to-date.

A dashboard page welcomes the user to the extranet and contains (or links to) the following:

- news from PRI
- view/edit their account details,
- view/edit the pages for which they have agreed to receive notifications
- list of pages/files they have contributed to/subscribed to/uploaded
- an activity feed with details of anything that has happened recently to said pages/files, like a new edit, comment or version etc

B. Content

The Site Map above sets out the various different sections to the site. If we leave aside for a moment the Signatory Reporting & Assessment database, the Proxy Vote Database, the member directory & research database parts of the Academic Network, and the Events section... then all other sections are essentially pages of content that use the same template and structure, are categorised according to a

shared vocabulary, and are supported by browse/filter/search/archive pages that help the user find the specific content page they're after.

All content pages are created first by PRI staff (potentially after users have recommended they do so, or when they see the need to split/aggregate pages that have become too long or diffuse etc), and once created are then open to collaboration and comment by the users which have access to the page.

These individual content pages all have the following fields and features. Note that some are 'optional' features, e.g. PRI staff can decide whether a page is or is not open to comments.

- Section of site (i.e. where they fit in the site map)
- Categorisation (i.e. by Theme, Asset Class, Type, Company, Region)
- Title
- Summary (written and updated by PRI staff, appended to top of page)
- Content (split into sections with sub-headings, both text and media — image, audio, video)
- Comments (*optional*)
- Get updates (yes/no, i.e. user chooses to be notified of changes, either by email and/or via their dashboard)
- User access (e.g. viewed by Signatories only, set by PRI staff)
- Attachments from PRI Staff, with version control
- Attachments uploaded by users (*optional*)
- PRI Staff 'Leader' for this page, i.e. the person to contact for more information, and a link to their profile.
- Working Group (*optional*, see Collaboration, below)
- Deadline (*optional*, a date noted somewhere on the page, perhaps with a countdown until comments are turned off, perhaps also giving a notification on a user's dashboard a few days before)
- Events (*optional*, this might be an official event or it might simply be notification of a conference call or webinar. Users can RSVP, which alerts the page author and adds the event to their dashboard for reference)
- Events Calendar (*optional*, if there are a lot upcoming events then it might be useful to have them display as a calendar)

C. Collaboration

In addition to the ability to comment and upload files (if PRI Staff have turned these features on), pages may also have a “Working Group” sub-page. This is most likely to be used within the “Clearing House” section of the extranet.

This sub-page is simply another page that has similar functionality to their parent page (title, summary, attachments, comments, events, deadline etc), but it also has some unique features:

- They are only accessible by Working Group 'members'
- They have a Status; which is either open (anyone can become a member by simply clicking a Join

button), private (only specific users will see the Join button and can become members, as decided by PRI staff; other users can apply to be invited); or Archived (no longer accepting membership applications, the conversation has finished and is read-only).

- Any comments are sent by email to all the WG members.
- The list of members is displayed on the page with links to profiles
- Separate to the list of page attachments, is a list of group-editable documents. These are documents that are edited in a wiki- or google-docs- style with version history and multiple authors.

D. Databases

There are three databases on the site that users may browse, contribute to and search. These are the Academic Network's Research Database, the Signatory Reporting and Assessment Database, and the Proxy Votes database. Each of these has an associated "upload" page where users with appropriate access can fill in a simple form and contribute their entry. They may later want to update their entry. Uniquely, individual files on the Academic Network's Research Database can have user comments.

E. See Also

Due to the large amount of content the extranet will eventually gather, and the shared categorisation across sections, there is the opportunity to offer numerous kinds of "see also" links in page sidebars. This would be both by category and by site section.

For example, if a page was in the Clearing House section, subject to the Categories of Region: London; Asset Class: xxx; ESG Theme, xxx; and Companies: xx, xx, xx; then sidebar links might include "See also in 'London,'" or "Asset Class xxx pages from the Academic Network." Separately, page attachments from other sections on the extranet are also listed, as "Useful Documents" of relevance to this category.

In this way we are both suggesting the next move to the site user, increasing their time on the extranet, and introducing an element of serendipity. Note that the links will be subject to user access rules, i.e. not accidentally showing links to pages that this user cannot view.

Administration

PRI Staff will create, approve and moderate all content. Staff members may have variable privileges (for example, a new page created by an intern needs approval by an editor before going live).

The extranet's administration will need to allow staff to manage:

- extranet users: approval, moderation, permissions and access, working-group membership, groups and subgroups
- admin users: moderation, permissions and access
- content: whether draft, published, hidden, or archived; public/private
- content approval: drafts/to go live/moderation
- content flagged by site users as inappropriate (to be edited or hidden)
- metadata, the categorisation and organisation of content
- files and page 'attachments'
- media (image/audio/video)
- view statistics and reports about site usage, popular content
- community management: user activity by group and category, contact users

Design

The extranet's design should be clean, appealing, efficient, hard-working and free of clutter. By this we mean that lots of information may need to be visible on each page (e.g. title, media, attachments, version, actual content split into sections, metadata, archives, related information, related links, etc) — but that the design should work to avoid overwhelming the user. We envision the use of generous white space and good typography to keep everything clear, organised and consistent.

Use of the PRI identity and colour is necessary but we are happy to build on top of this and introduce a new brand for the extranet. The Academic Network and Events Sections should maintain a small degree of independence and difference from the rest of the extranet, as they are visible to the General Public.

Some good websites in our sector include:

<http://www.cigionline.org>

<http://www.ceres.org> (good homepage)

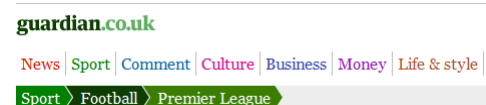
<http://www.responsible-investor.com/> (good homepage)

Other websites with useful elements:

<http://www.guardian.co.uk/commentisfree> - very successful forums that prompt lots of discussion - this would be a great way to organise our articles.

<http://www.globalreporting.org/AboutGRI/JoinGRI/> - For Clearinghouse postings where we want users to join, we can learn from the GRI.

www.guardian.co.uk – for navigation the way the Guardian organise using links and a bar at the top is also nice. As here:



<https://www.cdproject.net/reports.asp> - This is a good way to organise mass information and databases etc.

<http://www.cigionline.org/events> I really like the search, month calendar overview, and event showcase portion.

<http://www.cigionline.org/cigi09> - As an example of an individual event's page and features. The blog page which showcases video and comments is great!

<http://www.economistconferences.co.uk/event/cio-agenda/1114> and <http://www.economistconferences.co.uk/event/pharma-summit/118> are also good examples of how to do a more formal, in-person event that effectively showcases the topic, speakers, provides a forum for sharing presentations and other post-event materials (audio, video, documents).

Platform, Data Migration, Hosting & Support

Our natural tendency is toward Open Source technology, not only because we want to avoid being locked in to a particular set of developers for life, but also because we try to use it where we can in our office and in our workflow generally. If you do not generally open source your frameworks, then perhaps we could work to open source any unique frameworks that are made for this project. Alternatively, we would also be happy to build on a community platform like Igloo, Telligent, SocialText, Jive SBS, etc and we welcome your recommendations here.

Using a totally proprietary platform has not been ruled out, but we would require some rationale or details of the benefits of doing so.

Hosting and Support will doubtless be needed and we anticipate that the extranet will be tweaked and improved over time, as users, staff and statistics give us feedback to be analysed. Again we welcome your recommendations here.

The extranet will need to be legally compliant with the Disability Discrimination Act, use nicely semantic and accessible code, and be compatible with the majority of web browsers, including IE6.

All of the content from our current websites would need to be migrated into the new extranet — we can arrange access to our database so that you can export it however best you need and re-structure as necessary for the new website.

We are expecting that the successful agency meet to discuss, feed into and understand our requirements and then use that information to brief their own design and development team.

Proposal requirements

We have set aside 17 March 2010 to 29 March 2010 to respond to all queries and these can be addressed to ryan.pollice@unpri.org. The deadline for proposals to be delivered is 8 April 2010, and should be delivered to ryan.pollice@unpri.org

Please briefly outline your suggested approach to this project, including hosting and support. We would also like to see details of any analogous sites you have created, any suggestions you have for the project's scope and functionality, what you propose as a reasonable timeline for getting work done, and two recent references.

Our budget is approximately GBP 17,000.