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Terms of Reference

WEBSITE DEVELOPMENT: for the AFRICAN UNION FOR HOUSING FINANCE

Proposals due by 12 noon on 31 August 2020 by email to vanessa@housingfinanceafrica.org

For more information, contact Vanessa Khosa
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1. INTRODUCTION

The African Union for Housing Finance (AUHF) wishes to receive proposals from experienced digital and online web developers to upgrade / redevelop the current AUHF website (<http://www.auhf.co.za/>). The AUHF website is one of the main pillars of the AUHF brand and a key mechanism through which the AUHF engages with its members and the wider housing sector in Africa.

2. BACKGROUND TO THE AUHF

The African Union for Housing Finance (AUHF) was established as a non-profit trade association of housing lenders in 1984 in support of the development of affordable housing across the African continent. The AUHF started with 11 members in seven countries and has grown to incorporate 50 members from 19 countries across the continent in 2020. Members include commercial and mortgage banks, building societies, microfinance institutions, housing development corporations, academics, researchers, non-profit organisations and other institutions involved in the mobilisation of funds for shelter and housing. The AUHF operates as an umbrella body that promotes the development of effective housing finance markets and the delivery of affordable housing across Africa, working in the interests of both the members and the industry.

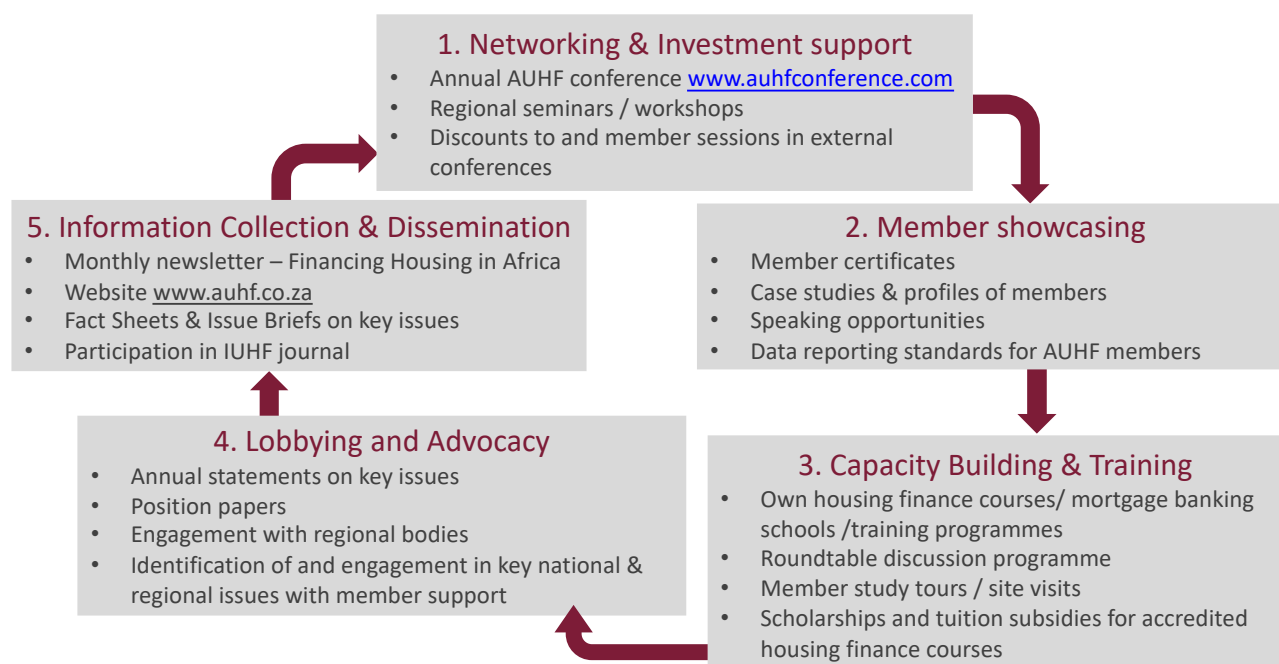
Vision: An enabled and productive housing finance sector across Africa where governments and the private sector work together to develop and maintain efficient and effective housing markets and access to adequate and affordable housing for all.

Mission: To support its members in realising their vision, through networking and deal facilitation, information collection and dissemination, lobbying and advocacy, and capacity building and training, while showcasing members to the wider public and investment community.

Objectives: As a member-based, industry association, the main objective of the AUHF is to support its members in realising their vision for an enabled and productive housing finance sector across Africa. Further objectives are as follows:

- To identify and connect stakeholders, establishing a vibrant and supportive housing finance sector across the African continent.
- To understand and communicate the key issues facing practitioners in the housing sector in Africa, with members and the wider housing sector.
- To promote member interests in making housing finance markets work in Africa;
- To promote best practice in the affordable housing industry across Africa.
- To enable members to respond to the challenges and opportunities within the contexts of their businesses, supporting better engagement between the public and the private sectors
- To promote and drive effective professional development among its members through the provision of housing finance training.
- To provide members with opportunities to network with one another, share information and build capacity towards improved housing finance systems in Africa, through the delivery of conferences, seminars, workshops, member exchanges and other mechanisms.
- To ensure the effective governance and sustainability of the AUHF towards the realisation of the mission and overall objectives.

To achieve these objectives the AUHF's work covers five main themes, linked to specific activities (as per the diagram below) within each theme.



Member services are advertised to prospective members as follows:

| | AUHF Member | | | Corporate | | | Individual | Honorary members | General public |
|----------------------------------------------------------------------------------------------------|---------------|---------------|---------------|--------------|--------------|--------------|-------------|------------------|----------------|
| | Financiers | | Suppliers | | Other | | | | |
| | Large | Small | Large | Small | Large | | | | |
| Representation | | | | | | | | | |
| · Right to vote at the AUHF AGM. | one vote | one vote | one vote | one vote | | | | | |
| · Right to be elected to the Board or Sub-Committee. | X | X | X | X | | | | | |
| · Certificate of membership | X | X | X | X | X | X | X | X | |
| · Observer at the AUHF AGM | | | | | one partic. | one partic. | one partic. | | |
| · Credibility. Members are part of an organisation that has been operating for 40 years in Africa. | X | X | X | X | X | X | X | X | |
| Accessing business opportunities - Networking & Investment Support | | | | | | | | | |
| · AUHF Annual Conference (registration fee) | X | X | X | X | X | X | X | X | X |
| · Speaking opportunities at AUHF & partner events/webinars | X | X | X | X | X | X | X | X | X |
| · Active, ongoing networking with potential investors | X | X | X | X | X | X | X | X | |
| Advancing and profiling your business - Member Showcasing | | | | | | | | | |
| · Logo on all AUHF branded material. | X | X | X | X | X | | | | |
| · Annually updated member profiles | X | X | X | X | | | | | |
| · Member dashboard on AUHF website | X | X | X | X | X | X | X | X | |
| · Member marketing at the AUHF Annual conference. | X | X | X | X | X | | | | |
| · Inclusion in the country profile for the CAHF Housing Finance in Africa Yearbook. | X | X | X | X | X | | | | |
| Building professional capacity - Capacity Building & Professional Development | | | | | | | | | |
| · Discounts to AUHF Conference and training events | all staff | all staff | all staff | all staff | two staff | one person | | | |
| · Discounts to partner training courses and events | all staff | all staff | all staff | all staff | two staff | one person | | | |
| · Discounts to study tours / exchange visits | all staff | all staff | all staff | all staff | | | | | |
| · Discounts to Housing Finance Course for Sub-Saharan Africa (to a max of 10 scholarships p.a.) | two staff | two staff | two staff | two staff | | | | | |
| · AUHF Board in-country visits and seminars | X | X | X | X | | | | | |
| · Participation in AUHF webinars | X | X | X | X | X | X | X | X | X |
| Shaping the future - Lobbying & Advocacy | | | | | | | | | |
| · Collective voice for advocacy and lobbying purposes | X | X | X | X | X | X | X | X | |
| · Country-specific lobbying and engagement plans | X | X | X | X | X | X | X | X | |
| · Branded Fact Sheets / Issue Briefs to share with own network | X | X | X | X | X | X | X | X | |
| · Signatory to annual Declaration for Housing Finance | X | X | X | X | X | | | | |
| Staying informed - Information Collection & Dissemination | | | | | | | | | |
| · AUHF Website / CAHF website | X | X | X | X | X | X | X | X | X |
| · Monthly newsletter | X | X | X | X | X | X | X | X | X |
| · AUHF LinkedIn and WhatsApp Groups | X | X | X | X | X | X | X | X | X |
| · Bespoke summary of CAHF research, for member countries | X | X | X | X | X | X | X | | |
| · Bespoke, on-demand research support from CAHF* | X | X | X | X | X | | | | |
| · Members only discussion and sharing through the members only section of the new website | X | X | X | X | X | | | X | |
| Annual fees | \$2500 | \$1250 | \$1250 | \$650 | \$250 | \$100 | Free | Free | Free |

The Secretariat of the AUHF is the Centre for Affordable Housing Finance in Africa (CAHF), an independent think tank based in South Africa, with a mission of making Africa's housing finance markets work. The relationship sometimes causes confusion with stakeholders: CAHF is recognised as a thought leader in affordable housing finance with the most comprehensive, up to date source of information on that topic in Africa. CAHF's work is funded by a range of funders, and the research, data collection and analyses it undertakes with this support is reflected on its website (<http://housingfinanceafrica.org/>). It is an independent not for profit organisation, governed by a Board of Directors. For its part, the AUHF is a member-based organisation, representing the housing industry in Africa. It is a mandated

organisation that delivers five types of services as outlined in the figure above, and is governed by its Board of Directors who are elected by the Annual General Meeting, comprised of members. The two organisations overlap, but with distinct areas of emphasis:

| African Union for Housing Finance | Centre for Affordable Housing Finance in Africa |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Industry body representing its members | Think tank promoting investment in affordable housing across Africa |
| <ul style="list-style-type: none"> • Information collection & dissemination • Lobbying and advocacy • Capacity building and training • Networking & deal facilitation • Showcasing membership | <ul style="list-style-type: none"> • Research, tools, datasets, etc. • Convening and network facilitation • Professional development and capacity building |

The overall aim of both organisations is to build a community of practice of housing practitioners in Africa to share information, build capacity, create more favourable conditions within each country for housing development, to ultimately increase economic growth and reduce poverty through improved housing markets. The immediate intention of the AUHF is to grow the membership substantially by increasing the diversity of membership and extending the reach of the organisation within the 55 countries in the continent over the next few years. The more players, the more impact. The new website should therefore be a key tool for attracting new members, serve the sector and champion growth in the sector.

3. AUHF WEBSITE BACKGROUND

3.1. Why the need for an upgraded website?

The current AUHF website is outdated and does not serve its intended purpose as indicated by the significant downward trend in all statistics related to the website (approximately 20 percent decrease in users from 2018 to 2019). Furthermore, those visiting the site are not enticed by the content enough to stay on the site with users mostly leaving the site after viewing the home page or one other page. Importantly as a member based association our members are not adequately showcased. Sharing the work of our members and highlighting their achievements and innovations in the sector is one of the key benefits for joining the AUHF. Current content does not demonstrate the extent of our involvement in the sector, the depth of knowledge or what our achievements have been. The current website reads as an advertisement for events hosted by other organisations and has lost the AUHF focus. The value add of joining the organisation is therefore not demonstrated. Key information can no longer be uploaded (such as the newsletters) and so much of the information is outdated and it appears as if no new work has been undertaken. The AUHF website also needs to link to the CAHF website as well as to other partners / funders. Lastly a separate website was created for the AUHF Annual Conference (www.auhfconference.com) to host Conference information and presentations. This website needs to be integrated into the AUHF website.

3.2. Purpose of website

The key purpose of the website is to build the profile of the AUHF as the representative of housing practitioners in Africa. The website should provide valuable information for the housing finance sector and demonstrate the value add / need for belonging to the AUHF so that we can attract new members and build the member base. The more members, the more funds, the more work that can be done in the sector. The website needs to facilitate dialogue between members, share member information and provide focus to the housing / housing finance sector in Africa, positioning the AUHF as the key body for advocating for the sector in Africa.

The second purpose is to share information regarding AUHF work undertaken in the 5 themes. As part of this, member profiles are very important as well as the dashboard showing all the members and other housing players (potential new members) in each country. The key AUHF event is the annual conference (held in a different country in Africa each year). Last year over 200 stakeholders from Africa attended this event in Cape Town and it was highly successful. This needs to be better showcased, linking to conference presentations and the conference report / video (not yet produced). The monthly newsletter also needs to be highlighted.

A comparative review of websites of umbrella bodies within the housing non-profit sector such as the National Association of Social Housing Organisations <https://www.nasho.org.za/> or the Mortgage Bankers Association

<https://www.mba.org/> is advised so that the service advisor gets a sense of what the AUHF would like to ultimately achieve as an organisation. The AUHF is not as well-resourced as these organisations at this stage but these websites give an indication of what we are trying to achieve. The website should complement but not duplicate the website of the Centre for Affordable Housing Finance in Africa (www.housingfinanceafrica.org)

3.3. Objectives

To design and construct a comprehensive and responsive website that offers a visible web presence for the AUHF, showcases AUHF members and acts as an awareness raising tool for members of the AUHF and other stakeholders in the sector.

4. PROJECT SCOPE

The CAHF will enter into a one year agreement with the successful bidder subject to acceptable performance by the supplier. The bulk of the work is expected in the first month when the website is developed. Once designed and up and running the service provider needs to train the local team member to upload new information onto the website and update members' details and member profiles as and when required. The successful bidder will be requested to provide specific digital platform development and management services as specified in this TOR.

The scope of work includes the following areas of work:

- Design, develop, test and activate website using existing domain and integrate www.auhfconference.com into this;
- The website should be expandable to include new content, new members and new member profiles;
- The administrator/s should be capable of uploading and downloading any file formats on the website;
- The administrator/s should be able to monitor the website visitors, number of documents downloaded, and all related details of website visitors categorized by countries;
- The website should contain a members only (password-protected) section where only registered and paid up AUHF members are able to access the content;
- The website should include a payment gateway to facilitate the payment of annual fees, or registration fees for key events
- The website must reflect the appropriate look and feel of the AUHF with appropriate logos, fonts, colours, and other design elements (to be provided);
- The website must contain the content as described in the wireframe;
- The website should be able to conduct member surveys of around 10 to 20 questions;
- The website must be a secured platform. The design of the website should adhere to security best practices,
- The website should have enabled google analytics for administrative purposes;
- The website should integrate related AUHF social media accounts – Facebook, LinkedIn, twitter;
- The website should incorporate options for generating revenue through the site such as with google ads;
- The website must be able to accommodate the AUHF dashboard; and
- The website must maintain itself for one-year after development and publishing.

5. DELIVERABLES

Technical Details

Site Design

- I. Home page and up to 10 interior pages based on final approved website design. HTML / CSS / JavaScript Programming;
- II. Converting the site design into search engine friendly and standards compliant HTML / CSS, as well as any JavaScript required for animations, hover effects, drop-downs, etc.
- III. Installation of Content Management System
- IV. Installing the content management system on a development server, implementing the template(s) into the CMS, and creating the barebones navigation structure & layout.

- V. Installing & Configuration of CMS Modules & Plugins This would include the configuration of all database driven sections of the site such as: products, videos, lead capture forms, reviews, etc.
- VI. Content Development with social network integration, search engine optimization and RSS socket
- VII. Spam Control: The website should provide an automated challenge system that reduces the number of spam comments/posts that either need moderation or slip through filtering mechanisms.
- VIII. Continuing hosting and maintenance of the site, which would include applying security patches, clearing out log files, enlarging disk space before it runs out, sorting out security certificates and fixing bugs in the code. (for 24 months)
- IX. Must include a secure payment portal for AUHF members to make online payments of annual fees.

Website hosting

- I. The website must be hosted on a platform / server with Zero down time experience / incidence
- II. The website should have an appropriate storage capacity (100GB) to accommodate email storage and web content. With sufficient scalability to increase over time.
- III. The host server for the website should support the use of PHP and MySQL for possible integration
- IV. The website should be optimized so that a bandwidth of at least 1024 is achieved to accommodate dashboards
- V. The website should be flexible for the development of an open APIs to another database
- VI. The web design and hosting company will perform three comprehensive maintenance tests annually in coordination with AUHF Focal person and provide emergency maintenance in the event of security vulnerability, throughout the duration of the contract
- VII. The web design and hosting company will provide remote support to AUHF focal person(s) throughout the duration of the contract

Mobile Device Optimization

- I. HTML / CSS / JavaScript Programming
- II. Updates to the desktop version of the site design to account for various mobile device widths (320px / 768px / [other]).

Testing and Pre-Hosting Phase

- I. The web development company would demonstrate the 1st phase design with details of all functions as requested on this ToR
- II. Testing phase / 1st phase should validate if the site is OK and ready for a launch
- III. 2nd Phase would be to access Site security, certificate, and encryption layers. If the 2nd phase is validated, we move to the 3rd phase
- IV. 3rd Phase will be launch of the website and sharing with all social media for wide publicity and broadcasting

Hand Over and Training

- V. The AUHF Secretariat is familiar with WordPress. The web development and hosting Company, after completing the design and hosting of the website, should deliver a comprehensive handover to AUHF focal person and conduct training for all relevant staff involved in day to day upload and editing of the website
- VI. The backup code and source code files will be delivered in full to client during handover.

Training Deliverables for AUHF Focal point

The development and Hosting Company shall train AUHF Focal person to be able to perform the following functions.

- VII. Manage comprehensive update of the website and management of website's current functionality, with adding and customizing online module
- VIII. AUHF Focal person(s) should be able to carry out full backup of the web site.
- IX. Should have an automated system that checks for broken hyperlinks on site
- X. socket to verify if site is up and running

- XI. Should be able to generate web site activity report

6. PROJECT MILESTONES

The applicant should determine timeframes within an 8 week window.

Key dates

| SCHEDULE OF MILESTONES | TIMEFRAME |
|-------------------------------------------------------------------|--------------------------------------------------|
| Requirement gathering and website specification on functionality. | One week after signing of contract |
| Website Design and wire framing | |
| Database design | |
| Implementation and programming | |
| Security and functionality testing | |
| Deployment | No more than eight weeks after project inception |

7. PROJECT BUDGET

No fixed budget has been set but service-providers should take into account that the AUHF is a small non-profit organisation with limited resources and capacity and so the website should be fit for purpose.

8. CONTENTS OF PROPOSAL

Proposals to undertake this project must include:

- i. Response to the ToR and wireframe content, demonstrating familiarity with developing websites for similar types of umbrella organisations or non-profit organisations, ideas for showcasing members' profiles, linking to the CAHF content and highlighting key issues for consideration in the work.
- ii. A detailed work plan, demonstrating the feasibility of the proposal.
- iii. Statement of qualifications as relevant to the project.
- iv. Name and CV of staff members responsible (i) for overseeing the work; (ii) for undertaking the work.
- v. Fee proposal and costs estimate, indicating the basis of the calculation of fees
- vi. Capacity building and black economic empowerment are key objectives of AUHF. In rendering the service, the consultant must endeavour to achieve these goals. South African firms must report on their BEE accreditation.
- vii. Familiarity with the development / affordable housing / housing finance sector is important.

9. PROPOSAL EVALUATION

Proposals will be assessed according to:

- i. Relevant, demonstrated competence for web design: 10 percent.
- ii. Demonstrated expertise of key individuals involved in this project: 30 percent.
- iii. Content and quality of proposal, including creativity and feasibility of approach: 20 percent.
- iv. Affirmative action scorecard (if South African firm) or use of local service providers: 15 percent.
- v. Financial proposal: 25 percent.

10. PROPOSAL SUBMISSION

The deadline for submission is at **12h00 on 31 August, 2020**, sent by email to vanessa@housingfinanceafrica.org. Once the selection process has been completed, AUHF will issue a contract confirming the appointment of the service provider.

Any queries should also be addressed to **Vanessa Khosa** who can be contacted on vanessa@housingfinanceafrica.org.

11. GUIDING NOTE TO BIDDERS

- African Union for Housing Finance (AUHF) reserves the absolute right to use its discretion in the interpretation of these award criteria. The following notes are intended to provide broad guidance only on how proposals will be evaluated. Bidders may be required to clarify their proposals by way of a telephone call, zoom meeting and / or presentation.
- “Relevant, demonstrated competence of firm(s) in this area” - You should aim to demonstrate how the firm’s collective past experience can be applied (or adapted) to address the specific brief set out in the terms of reference. You are welcome to describe the firm’s general experience of website development (e.g. in other geographies or topical areas) but the evaluation will focus particularly on the application of that experience for the specific task at hand.
- “Demonstrated expertise of key individuals to be involved in this project” – The evaluation places considerable emphasis on the role and demonstrated expertise (i.e. track record) of the key individuals to be involved on the project rather than on the expertise of the firm itself.
- “Use of local professional capacity (consulting, analysis, coordination etc.)” – The African Union for Housing Finance wishes to ensure that local capacity is used and developed.
- “Content, quality and originality of proposal” – Proposals should address the brief set out in the terms of reference in a comprehensive manner. Bidders should aim for innovation as well as professional presentation. Whilst similar, relevant experience in other markets will be an advantage for a bidder, each market is different and so proposals need to reflect the characteristics of that market, as well as the challenge set by the terms of reference.
- “Affirmative action scorecard”- Ownership, management, staff development.
- “Fee basis” – Value for money, as well as absolute cost, will be considered.