

## Terms of Reference (TOR)

### TOR for Solutions Portal website Design and Optimization and Maintenance SELCO Foundation.

<b>Title</b>	Development of Solutions Portal with Optimization and Design including Operations and Maintenance
<b>Timeline</b>	3-6 months development + 3 Years maintenance
<b>Expected area of expertise</b>	Development services, Ongoing Web Portal maintenance, Feature enhancements, technical support, etc
<b>Email</b>	<a href="https://selcofoundation.org/">https://selcofoundation.org/</a> / <a href="mailto:procurement@selcofoundation.org">procurement@selcofoundation.org</a>
<b>Apply Google Link</b>	<a href="https://forms.gle/NLNaob3ZcchiRFq98">https://forms.gle/NLNaob3ZcchiRFq98</a> (Contact Procurement for Form Link)

#### About SELCO Foundation

SELCO Foundation's mission is to create a platform of solutions that uses sustainable energy as a catalyst to link environmental sustainability and poverty alleviation. With holistic development as the primary focus, the organization strives to create equitable societies, where all communities access services. The interventions of SELCO lead to a sustainable delivery model of essential services like livelihoods, and health till the last mile. (Read more about SELCO here: <http://www.selcofoundation.org>)

#### 1. About Solutions Portal

Solutions Portal (<https://www.solutionsportal.org/>) is an online platform aimed at connecting rural farmers, micro-entrepreneurs (especially women from Self-Help Groups (SHGs), FPO members, PVTGs, Entrepreneurs with disabilities etc) with manufacturers, and other stakeholders, showcasing curated technological solutions that can improve productivity, wellbeing and livelihood incomes. Unlike e-commerce platforms, Solutions Portal is a connecting platform for the dissemination of products, business development and technology content that results in the adoption of Solar and Climate Smart Solutions.

## 2. Current Status and Features of the Solutions Portal

The Web Portal has been developed to be primarily mobile-friendly, ensuring users can access it conveniently from any location and at any time.

### High- Level Backend

The backend setup for this project revolves around WordPress, with various powerful plugins to extend functionality.

1. **WordPress:** The core CMS platform that powers the site, providing a flexible structure for managing content and functionality.
2. **Elementor & Elementor Pro:** A drag-and-drop page builder for designing the frontend, with advanced features in the Pro version for dynamic content and theme building.
3. **WooCommerce:** The e-commerce plugin used for managing products, orders, and payments.
4. **ACF (Advanced Custom Fields):** ACF allows the creation of custom fields to extend post types, taxonomy, users, and more, offering flexibility in data management.
5. **Security Plugins:** MalCare, Word fence, Limit Login Attempts Reloaded, Sunup Security protect the site from vulnerabilities, malware, and brute force attacks.
6. **Product Management Plugins:** Jet Product Gallery, YITH WooCommerce Product Slider, Jet Smart Filters—help optimize product display and customer experience.
7. **Order and User Management:** Plugins like Advanced Order Export for WooCommerce and Import-Export WordPress Users and WooCommerce Customers simplify data export and migration.

## 3. Scope Of the Work

The scope of work includes

### A. Development

- a. Analysis of the Current Web Portal
- b. Create a New Framework-Based Platform Based on Analysis with additional modules - Supplier module; Customer and partner feedback and review; Business development content (YouTube integration)
- c. WhatsApp intuitive chatbot (and opportunity to integrate with other websites and platforms)
- d. Analytics dashboard for user access

### B. Maintenance

- a. Ongoing maintenance and management of downtime/ reduction in speed etc and timely alerting SP team of the Web Portal and other platforms under SP

## **A. Development**

### **1. Analysis of the Current Web Portal**

The agency is expected upon onboarding to test and analyze the backend and Web Portal functionality

- **User Experience Enhancement**

- High load times
- User flow
- Implement strategies such as image compression, lazy loading, or server-side optimizations to reduce load time.
- Use caching to speed up Web Portal performance
- Adding more languages to the portal helps users enhance their experience

- **Backend Improvements**

- Complicated product upload process, manual linking of technologies, and lack of auto-updates for enquiry responses.
  - Streamline the process so that uploading details only requires a one-time setup, reducing redundancy.
  - The process of uploading technologies is time consuming and load time in the backend is very long.
  - Technologies should be linked dynamically to the relevant sectors and change the breadcrumbs on their selection to ease user navigation and search.
  - Automate the process of updating enquiry responses to keep track of problem statements, forms, and onboarding without manual effort.
- Use caching to speed up Web Portal performance

### **2. Create a new portal utilizing new technology framework Based on End User Needs Research and Analysis**

Based on the insights gathered during the analysis, the agency will develop a **new Standard Coding Framework Based web portal** with the following objectives:

- **Development of Standard Coding Framework Based web portal**

- Create a Fully Customized Web Portal Utilizing the Latest Technology Frameworks for Scalability, Security, and Other Key Features.
- Focus on optimizing the Web Portal for performance, scalability, and mobile responsiveness across various devices and browsers.
- Implement all new features and backend improvements based on the analysis and discussions with the solutions portal team.

- Additional to the existing modules,
  - develop a supplier (technology vendors) dashboard module (Reduce inefficiencies in current process for existing vendors to add on new technologies, New vendors to register and validate, Customize their business pages, Follow up on leads generated),
  - User (Community and Partner - Customers require peer validation, Symbols linked to benchmarking by SF and partners, Feedback and testimonials by Community and NGOs (community reps) - transparency of information) Feedback and review module;
  - Business development content (YouTube integration - Offering proactive and consistent (recurring) business support)
- **UI/UX Enhancements**
  - Design a more streamlined user interface with improved user navigation and interactivity.
  - Ensure a consistent user experience across mobile and desktop devices.
  - Implement the voice search feature, dynamic filtering, etc based on discussions with the solutions portal team.
- **Backend and Database Optimization**
  - Build a robust backend architecture to support the Web Portal's new features and improve content management.
  - Optimize the technology linking process and automate key backend tasks (e.g., enquiry responses, tech uploads).
  - Implement security best practices, including regular backups, automated monitoring, and regular security audits.
- **Performance and Speed Optimization**
  - Minimize server load times, optimize images, and reduce database calls.
  - Implement caching strategies and content delivery network (CDN) to ensure fast loading speeds for users globally.
  - Implement Search Engine Optimization (SEO) Strategies to Enhance Visibility and Improve User Accessibility.

### 3. **WhatsApp Intuitive Chatbot** (and opportunity to integrate with other websites and platforms)

- a. Intuitive and natural conversations in response to enquiries by farmers and nano entrepreneurs on tech specs, demo videos, vendor linkage etc
- b. Seamless data sync with content from Solutions Portal website, YouTube and database
- c. Reduce unnecessary user effort with personalized responses
- d. Quick replies and prompts
- e. Smart AI & NLP Capabilities
- f. Voice based conversations with multiple regional languages

- g. Key analytics and metrics linked to analytics dashboard – to identify content and solution gaps and needs
- h. Broadcasting messaging to existing active users

Additional note: Future platforms and websites to be integrated ex. with State Rural Livelihood, Banking institution platforms and scheme application

#### **4. Analytics Dashboard for User Access**

Improved decision making – data on user type, region, accessibility, heat maps, intent on PID and content requirements and evidence/ feedback for platform upgradations

##### **Key Performance Indicators (KPIs):**

- Monitor the number of visitors and sources of traffic (organic, non-organic, direct, referral, etc.).
- Measure the number of users who perform a desired action (e.g., making an enquiry, adding items to the Wishlist, etc.).
- Track interactions with the AI chatbot, search queries, and filter usage.
- Regularly monitor keyword rankings, site speed, bounce rates, and CTR (Click-Through Rate).
  - Optimize URLs, metadata, and internal linking for SEO.
  - Ensure the site is ADA-compliant for accessibility.
  - Update content regularly for freshness and engagement.
- Track the performance of mobile users separately, given the emphasis on mobile responsiveness.
- Develop monthly summary reports as per the pre-defined events

#### **B. Web Portal Maintenance**

- Regularly monitoring the Web Portal to ensure that all features function as intended and keep everything up to date.
- Conduct regular speed tests and optimize performance.
- Make sure that all forms and enquiry responses are automatically updated in the backend (Excel sheet or database).
- Ensure content (product details, tech info, etc.) remains up to date across the site.
- Regularly updating Web Portal content, such as adding and uploading Technologies, Activities, Filter content, Header Content etc
- Troubleshooting and resolving Web Portal issues (e.g., broken links, page loading problems, bugs).

- Schedule regular software updates, monitor performance, and back up data to ensure ongoing site stability.
- Regularly update software and plugins to prevent vulnerabilities.
- Set up automated alerts for performance issues.
- The Solutions Portal team should be informed in advance about scheduled downtime, ideally 24-48 hours ahead, through emails notifications.
- Upon identification of any issues or bugs causing Web Portal downtime, the maintenance team must take immediate action to resolve the problems and restore the Web Portal's functionalities as quickly as possible
- Perform regular backups and ensure quick recovery options.
- Ensuring all links and forms on the Web Portal are working as expected.
- Ensuring compatibility across different browsers and devices (Chrome, Firefox, Safari, etc.) and all mobile devices.
- Implement thorough **testing** in collaboration with the Solutions Portal team to ensure bug-free deployment.
- Test new features, backend improvements, and performance optimizations before full deployment.
- Use a standardized testing process, automate deployment, and test changes in a staging environment before going live.
- Implement comprehensive testing (functional, UI/UX, performance)
- Use CI/CD pipelines for continuous deployment
- Conduct an SEO audit and apply best practices for on-page and technical SEO.
- Develop automated analytics reports to track Web Portal performance and user interaction metrics (e.g., bounce rates, click-through rates, Page view etc.) weekly.
- Ensure SSL encryption, regular security audits, 2FA, and daily data backups to protect against security threats.
- Training internal team members in Web Portal management, content updating, and troubleshooting.
- Weekly or bi-weekly meetings will be held to update the Solutions Portal team on progress, challenges, and milestones.
- Regular progress reports will be shared to highlight completed tasks, upcoming milestones, and any risks or potential delays.
- Ensure clear alignment on features and system compatibility before starting development.
- Ensure mobile responsiveness is a primary focus, followed by the implementation of additional features.

Note:

1. Once the new Web Platform is developed, maintenance activities and scope will transfer from the current website to the new.
2. The agency will be empaneled for a minimum of 3 years for these recurring activities.

#### 4. Deliverables

Phase	Deliverable	Timeline
Kick Off	1. Analysis report with project plan (Deliverable no.1)	10 days after contract signing
New Web Portal Development	2. Development of the new web platform (Deliverable no.2)	3 months post Deliverable 1
	3. Development of WhatsApp Chatbot (Deliverable no.3) Including testing, hosting, and release	
	Knowledge transfer, technical documentation, source code	Post development phase
Analytics Dashboard Development	4. Development of analytics dashboard	4 months post Deliverable 1
Recurring maintenance contract	Maintenance and analytics of current Web Portal	Recurring from Deliverable 1 till Deliverable 2 and 3
	Maintenance of new platform replacing the current platform	From Deliverable 2 and 3 onward

#### Project Management Planning

To ensure that the service is delivered efficiently, of high quality and within the expected timelines, the companies interested must adhere to a structured approach following the project management best practices.

- 1. Adherence to Latest Coding Standards:** The development team should ensure that all code written throughout the project follows the latest industry standards and best practices. This includes, but is not limited to, maintaining clean code, using version control systems (e.g., Git), and adopting a consistent coding style. Code reviews and adherence to style guides should be part of the ongoing process.
- 2. Deployment to Staging or Testing Instance:** The team should deploy all code into a staging or testing instance for review by the Solutions Portal team before finalizing the release. This deployment should occur at regular intervals (e.g., weekly or bi-weekly) to facilitate continuous testing, feedback, and validation. This ensures that the Solutions Portal team can assess the functionality and provide feedback early and often during the development process.

3. **QA Sign-off Prior to Staging Instance Release:** Before any code is deployed to the staging or testing environment, the project team must ensure that the code has undergone thorough quality assurance (QA) testing. A proper QA sign-off must be obtained from the designated QA personnel or team before the code is pushed to the staging instance. This step is crucial for ensuring that the functionality works as expected and that no major issues are introduced.
4. **Incorporating Feedback from the Solutions Portal Team:** Feedback from the Solutions Portal team will be an integral part of the development process. The project team is expected to actively engage with the Solutions Portal Team during regular check-ins and incorporate all feedback provided. This iterative process of development and feedback will ensure that the final deliverables align with the objectives and requirements of Solutions Portal.
5. **Documentation of Processes and Changes:** All development processes, changes, and decisions must be fully documented. This includes documenting code changes, configuration settings, dependencies, deployment procedures, and any issues encountered during the development lifecycle. Proper documentation will ensure that the project remains transparent, traceable, and maintainable in the long run.
6. **Regular Check-ins with the Solutions Portal Team:** To maintain alignment with Solutions Portal Team's expectations and ensure smooth progress, the project team must conduct regular check-ins. These meetings should occur on a weekly or bi-weekly basis and include updates on project progress, challenges, and timelines. These sessions will also provide an opportunity for the Solutions Portal team to raise concerns or provide additional feedback as needed.
7. **Progress Reports:** The project team must provide regular progress reports to the Solutions Portal Team. These reports should highlight completed tasks, upcoming milestones, any potential delays, and any risks or issues that might affect the project timeline or scope. The reports should be structured to be easily understood by both technical and non-technical stakeholders, ensuring full visibility into the project's progress.

By adhering to these guidelines, the development process will remain structured, efficient, and aligned with Solution Portals goals. The project plan submitted by the interested companies should reflect these requirements, ensuring both transparency and accountability throughout the development process.

## 5. Evaluation and selection process

The primary criteria for selecting the agency to undertake this project are its expertise and experience in the following areas:

- The experience must specifically include building and managing Web Portals
- The agency must submit a minimum of two samples, case studies, or references from previous work to demonstrate its experience in the aforementioned areas.

Furthermore, the evaluation of the following components of the project proposal submitted by the agency will be crucial in the selection process:



1. The agency's comprehension of the project requirements and challenges, along with its ability to meet both functional and non-functional requirements, and the assessment of the proposed project plan.
2. Solutions Portal will require discussions with the agency leadership and the project manager assigned to the project.
3. Proposed best practices and value-added solutions for the project.
4. Governance and project management methodology aimed at optimizing cost, time, and quality throughout the engagement.

## **6. Terms and conditions**

### **1. Pricing and Taxation**

The Agency shall provide a detailed monthly cost quotation in Indian Rupees (INR) for the resources listed in the Expected Deliverables, specifying the required skill sets and experience. The quotation shall be inclusive of all applicable taxes and costs.

### **2. Intellectual Property Rights**

All materials developed during the engagement, including but not limited to:

- Products
- Processes
- Inventions
- Source code
- Documents
- Other materials

shall be the exclusive property of SELCO Foundation and SELCO Foundation reserves the right to use, modify, and distribute these materials as needed.

### **3. Delivery Timeline**

The Agency shall submit deliverables according to the mutually agreed-upon timeline established during onboarding.

### **4. Payment Terms**

Billing shall commence only after successful completion of Digit certification and enablement.

By submitting the proposal, the Agency acknowledges acceptance of these Terms and Conditions.

## 7. Commercial Terms

- This is a fixed-cost project. All agencies submitting proposals must include the following elements:
- A detailed Project Plan outlining the scope, approach, and key deliverables.
- A Timeline specifying the project phases and milestones, along with estimated completion dates.
- A commitment to providing three months of support and maintenance post-project completion.
- Providing timely support for any technical issues faced by Web Portal administrators or users, along with 24/7 monitoring and troubleshooting of Web Portal performance. Additionally, as needed, the assigned resources may be required to work from SELCO Foundation's Bengaluru office.

## 8. Payment Terms:

Payments will be made based on the completion of agreed deliverables. A detailed payment schedule will be included in the contract and based on considered each party agrees.

## 9. Timeline:

Duration of the Program: The program is planned to **3-6 months development + 3 Years maintenance**

## 10. To apply

Interested consultants / organisations, with relevant experience (please include samples and/or references of the previous similar work as proof of experience) and based out of India are requested to reach out with a detailed proposal giving a brief on the methodology and the process they will uptake for this project, including budgets (with break-ups and explanation), timelines and milestones and submit the same to google form <https://forms.gle/VFsSfrxvMBG8rAsLA> on **before 10/04/2025**.

Any further queries please write to **procurement@selcofoundation.org** with a subject line: **“Solutions Portal with Optimization, Design and Maintenance” (Name of Project)**

## **Refer Terms and Condition:**

- 1. Sub-contracting:** In the event that the Consultant requires the services of subcontractors to perform any obligations under the Contract, the Consultant shall obtain the prior written approval of the Foundation. Any rejection or non-performance of the subcontractor shall not, in and of itself, entitle the Consultant to claim any delays in the performance, or to assert any excuses for the non-performance, of any of its obligations under the Contract, and the Consultant shall be solely responsible for all services, obligations and deliverables performed by its subcontractors
- 2. Quality Assurance**

The data submitted to Selco Foundation should be accurate, complete, reliable and relevant. Consulting agency shall establish additional layers for data cleaning and submission.
- 3. Financials & Reporting**

TDS will be deducted on the fixed amount as per Income Tax Act and Rate of Percentage. In accordance with the Central Board of Direct Taxes circular No. 7 of 2022 dated 30th March, 2022 in relation to the clarifications with respect to Section 114AAA of the Income-tax Rules, 1962, failure to link Aadhar number to the PAN card and/or failure by any person, who falls within the income tax bracket or otherwise, to file tax returns in relation to payment of TDS for any service (in accordance with Section 206AB and 206AA) and/or an inoperative PAN card will result in a 20% tax deduction.
- 4. Indemnification**

Both parties shall indemnify and hold its Trustees, Directors and representative officers, employees, agents harmless from and against any and all claims, demands, actions, losses, liabilities, charges, damages, costs and expenses (including but not limited to reasonable attorney's fees) arising out of or resulting from (1) any claims arising in connection with activities undertaken by both parties in connection with the project or (2) Consultant's gross negligence or willful misconduct or breach of any undertaking, covenant, representation or warranty contained in this agreement and/ or the actual infringement of any patent, trademark, copyrights, trade secret or any other intellectual property right of the third party.
- 5. Patent, Copyright and other Proprietary Rights**
  - (i) Except as is otherwise expressly provided in writing in the Contract, the Foundation shall be entitled to all intellectual property and other proprietary rights including, but not limited to, patents, copyrights, and trademarks, with regard to products, processes, inventions, ideas, know-how, or documents and other materials which the Consultant has developed for the Foundation under the Contract and which bear a direct relation to or are produced or prepared or collected in consequence of, or during the course of, the performance of the

Contract. The Contractor acknowledges and agrees that such products, documents and other materials constitute works made for hire for the Foundation.

- (ii) Subject to the foregoing provisions, all documents, reports, recommendations, documents, and all other data compiled by or received by the Consultant under the Contract shall be the property of the Foundation, shall be made available for use or inspection by the Foundation at reasonable times and in reasonable places, shall be treated as confidential, and shall be delivered only to the Foundation's authorized officials on completion of work under the Contract
- (iii) The Consultant will treat all information given to him/her as information with proprietary value and will not disclose the same to competitors or any outsiders. The Consultant will not at any time, except under legal process, divulge any trade or business secret relating to the Foundation or any customer or agent of the Foundation, which may become known to him by virtue of his position as consultant, save in so far as such disclosure shall be necessary in the interest and for the benefit of the said Foundation and will be true and faithful to the Foundation in all dealings and transactions whatsoever relating to the said Foundation.
- (iv) Reports or other data that are developed specifically for the performance of this Contract shall be the property of the Foundation and the Consultant shall deliver reports and data to the Foundation as per the milestones. Dissemination of the reports and any information from the said contracts shall be done with written approval from the Foundation.

**6. Publicity, use of name & Logo of the Foundation:** The Consultant shall not advertise or otherwise make public for purposes of commercial advantage or goodwill that it has a contractual relationship with the Foundation, nor shall the Consultant, in any manner whatsoever use the name, emblem, logo or official seal of the Foundation or that of SELCO in connection with its business or otherwise without the written permission of the Foundation.

**7. Observance of Law:**

- (i) The Consultant shall comply with all laws, ordinances, rules, and regulations bearing upon the performance of its obligations under the Contract.
- (ii) The Consultant represents and warrants that neither it, its parent entities, partners or subcontractors nor any of its subsidiary or affiliated entities (if any) is engaged in any practice inconsistent with the rights set forth in the *Child Labour (Prohibition and Regulation) Act of 1986*, which, *inter alia*, requires that a child shall be protected from performing any work that is likely to be hazardous or to interfere with the child's education, or to be harmful to the child's health or physical, mental, spiritual, moral, or social development.
- (iii) The Consultant represents and warrants that it shall adhere to the mandates prescribed under the *Sexual Harassment of Women (Prevention, Prohibition & Redressal) Act, 2013*, which requires all workplaces to have a Policy and Internal Committee to address complaints of sexual harassment that women may face at the workplace

## **8. Termination:**

Either party may terminate this contract by giving a notice in writing to the other party stating their intention to terminate the same on the expiration of Seven (7) days from the date of such notice. In addition, the Foundation may also terminate this contract forthwith in the event of any fraud, misconduct or neglect of duties on the part of the Consultant. Any notice to be given hereunder shall be sufficiently given to the Consultant if forwarded by registered post or by Courier Service to the last known postal address of the Consultant and shall be sufficiently given to the Foundation if similarly forwarded to the registered office. Upon the termination of this contract and payment of the said fees due up to such termination, and payment of all disbursements and out-of-pocket expenses incurred up to the date thereof (provided the same have been incurred after obtaining prior approval), the Consultant shall deliver all deeds, documents and paper in his possession relating to the business of the Foundation or as the Foundation shall direct, and shall continue to afford him all reasonable assistance for concluding pending matters at the date of such termination without making any charge thereof.

## **9. Force Majeure:**

- (i) *Force majeure* as used herein means any unforeseeable and irresistible act of nature, any act of war (whether declared or not), invasion, revolution, insurrection, terrorism, or any other acts of a similar nature or force, *provided that* such acts arise from causes beyond the control and without the fault or negligence of the Consultant
- (ii) In the event of and as soon as possible after the occurrence of any cause constituting *force majeure*, the affected Party shall give notice and full particulars in writing to the other Party, of such occurrence or cause if the affected Party is thereby rendered unable, wholly or in part, to perform its obligations and meet its responsibilities under the Contract. The affected Party shall also notify the other Party of any other changes in condition or the occurrence of any event which interferes or threatens to interfere with its performance of the Contract. Not more than fifteen (15) days following the provision of such notice of *force majeure* or other changes in condition or occurrence, the affected Party shall also submit a statement to the other Party of estimated expenditures that will likely be incurred for the duration of the change in condition or the event of *force majeure*.
- (iii) On receipt of the notice or notices required hereunder, the Party not affected by the occurrence of a cause constituting *force majeure* shall take such action as it reasonably considers to be appropriate or necessary in the circumstances, including the granting to the affected Party of a reasonable extension of time in which to perform any obligations under the Contract.
- (iv) If the Consultant is rendered unable, wholly or in part, by reason of *force majeure* to perform its obligations and meet its responsibilities under the Contract, the Foundation shall have the right to suspend or terminate the Contract on the same terms and conditions as are provided for in this Contract.

**10.**Both the Foundation and the Consultant fully and freely intend to create an independent Contractor relationship under this Contract. Nothing herein shall be deemed to establish a partnership, joint venture, association or employment relationship between the parties. Both parties agree that the consultant has the right to sole and exclusive control over the manner and means employed in performing their activities under this Contract.

**11. Settlement of disputes:**

- (i) The Parties shall use their best efforts to amicably settle any dispute, controversy, or claim arising out of the Contract or the breach, termination, or invalidity thereof.
- (ii) Any dispute, controversy, or claim between the Parties arising out of the Contract or the breach, termination, or invalidity thereof, unless settled amicably, within sixty (60) days after receipt by one Party of the other Party's written request for such amicable settlement, the matter shall be referred by either Party to arbitration in accordance with the Arbitration and Conciliation Act, 1996. The venue of the arbitration shall be at Bangalore. Likewise, the jurisdiction will vest with courts in Bangalore.