

STEP Digital Portal Brief

Overview of Programme:

Palladium, a leading development management firm, is seeking a web developer for the creation and maintenance of a website and portal for a new project in Lebanon. The Subsidized Temporary Employment Programme (STEP) is funded by the UK Department for International Development (DFID) and set to launch in early 2018.

STEP is a 3 year programme which aims to incentivise businesses across Lebanon to expand production and create new jobs for low-skilled Lebanese and Syrian workers. STEP is expected to achieve this through the provision of finance and employment incentives for small and medium enterprises (SMEs), as well as a flexible package of technical assistance to facilitate access to Business Development Services (BDS).

Palladium is collaborating with a number of local partners to deliver the programme's main objective of creating new jobs by supporting SME growth. These are Lebanese financial institutions, BDS providers, and M&E specialists who will provide direct financial and technical support to the selected SMEs, support the tracking of job creation targets, link job-seekers to SMEs, monitor working & safety standards in SMEs, etc.

Digital Portal

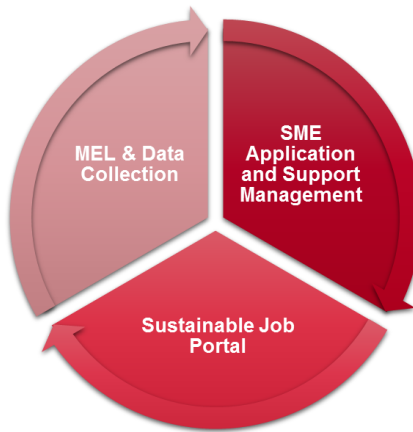
A user-friendly multi-purpose online platform and website is required to support the project's core activities. There will be staged process for the portal. The immediate priority is the development of the programme website and an application portal, in conjunction with a mobile friendly application (Iphone, Ipad and android compatible). The platform should be linked to the project's social media (e.g. Facebook) and support videos and contents which highlight success stories and news bulletins.

The Website and application can be used by SMEs to apply for support (eg. grants, loans, BDS services) or where STEP's partners can submit applications on behalf of the SMEs. This must commence at programme start (January 2017) and must be completed within a 2 month period in time for 1 month testing, piloting, and refining; by the April 2, 2018, the project will launch the first call for SME applications (Month 4) that include but not limited to monitoring and evaluation (M&E) functionalities, and basic job posting section. Broader CRM, portfolio management, advanced job application section, will be built in parallel or after these first milestones. The job component and opportunities section of the application can be linked to a local job posting portal, namely Daleel Madani. The Website and application offer ability for individuals, and companies to securely access the app, register, login, create profile, track any relevant updates and opportunities.

A key function of the portal is to manage and monitor the entire SME journey, from the moment they apply for support screening of applications, selection, grants disbursements, and tracking and monitoring of progress and performance thereafter. The platform must have a content management system to allow non-technical administrators to navigate, easily maintain, and make changes, query, and report in visual and tabular format the data. In addition to automation the application offers export and import functions, allowing partners to securely import their beneficiaries. The STEP admin team can view, comment, place the beneficiary/applicant under a pending waiting approval stage, reject, or approve the beneficiary for receiving matching grant and or BDS.

Key features and benefits:

- Coordination and uniform reporting
- Supports adaptive management approach
- Partners can upload regular progress reports, data and comments
- Overview of fund portfolio by region, sector, geography, jobs, etc.
- Tracking of: # of SMEs, amount of grants, loans, wage subsidies and savings disbursed
- Login for IE to access data and reporting



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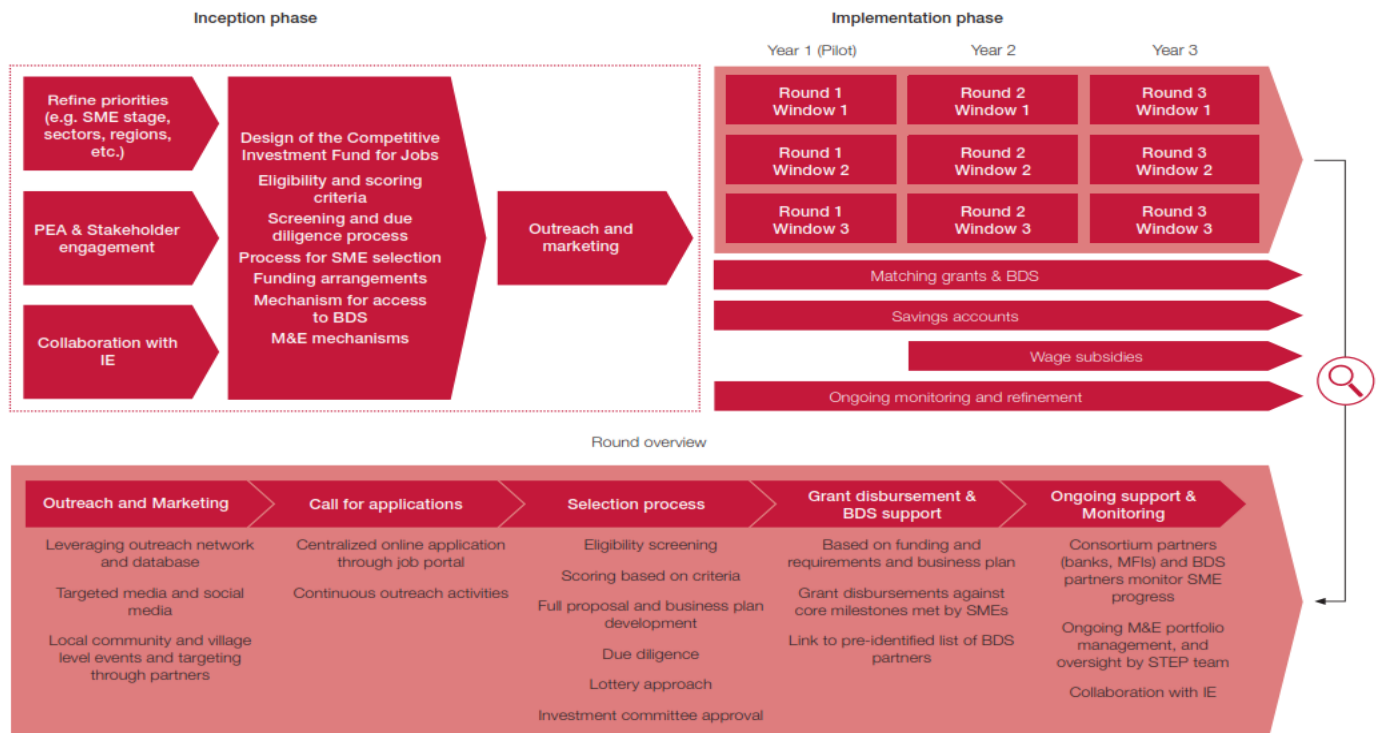
- Ability to view applications/scoring promotes transparency and fairness in selection process
- Rapid screening of applications
- Overview of individual progress against milestones, BDS support provided, jobs created, potential risks, etc.
- View grant agreements, business plans based on diagnostics, matchmaking grants and loans approved

Key features and benefits:

- Fills market information asymmetry
- Job seekers find appropriate jobs and employers reduce recruitment time
- SMEs post their job requirements
- Easy to use app/platform for job seekers to search jobs and apply
- Search jobs by occupation, sector, geography, etc.
- Match make and search in the job seekers module for successful candidates
- Flag an approved job seeker as recruited

Table 1: Note that the digital portal may evolve into a spin-off job portal business.

We anticipate a high level of interest, particularly from potential business applicants seeking funding and support. Thus, the primary audience for our website is businesses and our local partners (financial institutions and business development service providers) who will coordinate applications. Given the likely high volumes of applications (targeting 1000 applications in Year 1 alone), it is essential to have a strong back-end to support the selection and tracking of applicants, and the portfolio management of several hundred SMEs. See Annex B for overview of Investment Fund and application process. We also note that there will may be a blend of online and offline applications and it would critical for the portal to be able to import application data from partners.



As the programme is highly experimental, learning is also at the heart of our work. To this end, DFID has contracted an Independent Evaluator (IE) to evaluate the ongoing benefits and learnings from the project. Thus, we must be able to

manage data from multiple sources, provide timely data analysis, track, and assess impact of our activities (e.g. number of jobs created) and help inform project strategy and priorities.

The Communications Manager will hold responsibility in managing the overall website and portal. However, multiple internal project users - the SME Lead, M&E Manager, Grants Manager - should have access and provision of restricted access to external parties - partners scoring applications - could be considered.

An overview of key website and portal needs:

Core activities	Core functionalities	Main users
<p>Project website</p> <p>User (mobile) friendly, modern and clean</p> <p>Secure login and access</p>	<ul style="list-style-type: none"> • Central point for project information - overall goals, investment fund eligibility and process, updates, research, blogs, videos, etc. • Drive eligible applicants to apply • Multilingual interface; Arabic and English languages 	<ul style="list-style-type: none"> • Primary audience: potential business applicants and partners who will submit applications on behalf of SMEs • Secondary audiences: broader public, development community, gov't, media and civil society
<p>Applications</p>	<ul style="list-style-type: none"> • Ease of use - online and mobile • Multilingual Application forms and templates which are easy and cost effective to make changes to. • Able to upload documents, videos, etc. • Ability to save changes before submission • Offers online support video based and FAQ sections 	<ul style="list-style-type: none"> • Primary: SMEs • Secondary: Partners and Programme team
<p>Application management</p> <p>Centralized, efficient and automated when feasible, ease of internal changes from team</p>	<ul style="list-style-type: none"> • Pre-screening for eligible applicants: ensure they meet basic criteria before proceeding to application to reduce manual screening • Ability to score online or upload offline scoring to central platform. Reviewers should have different restrictions for internal and external • Automated updates to applicants along application cycle (e.g. thank you for applying, etc.) • Ability to track number of applications and rapid data analysis of types of applicants (e.g. sector, gender, geography, etc) 	<ul style="list-style-type: none"> • Primary: Programme team and partners
<p>Database/CRM management</p>	<ul style="list-style-type: none"> • Contact database, relationship management, data analysis, queries, reporting, etc. • Importing and Exporting mechanism • Informs outreach and marketing activities • Supports our Business Development Services (BDS) network building activities 	<ul style="list-style-type: none"> • Primary: Programme team and partners
<p>Portfolio and grants management and</p>	<ul style="list-style-type: none"> • Ongoing data analysis to track overall portfolio - e.g. dashboards • Data and tracking to support grant management and disbursements • Examples of type of data: <ul style="list-style-type: none"> • SMEs portfolio by sector, geographies, size of SMEs, those getting grants or just BDS, etc • Grants Loan Disbursements 	<ul style="list-style-type: none"> • Primary: Programme team and partners • Secondary: Independent Evaluator

Performance tracking	<ul style="list-style-type: none"> • Number of job seekers by category, region, nationality, and gender • Number by region and types of BDS partners by targeted beneficiaries • Number of jobs created (Lebanese or Syrian) • Type of jobs created 	
Monitoring & Evaluations (M&E)	<ul style="list-style-type: none"> • Data entry functionality for field/partners' staff to enter and update monitoring data on a rolling basis, through basic, customisable online forms that can be accessed with unique login details for staff and partners. • Centralised dashboard with functionality for (i) conducting basic analysis, (ii) visualisation of results, (iii) customised report generation based on variables specified. • GIS/Mapping functionality based on the location data from the SMEs • Central collection for data and research, data analysis, tracking of SMEs, beneficiaries, etc. 	<ul style="list-style-type: none"> • Primary: Programme team • Secondary: Independent Evaluator
Support package	<ul style="list-style-type: none"> • Developer support package for capacity building, additional support (e.g. amending and fixing glitches), and maintenance 	

Timeframe and milestones: We envision that the digital portal will be built in stages:

	Deadline	Dependencies
Stage 1		
a) Basic website	By Month 1	<ul style="list-style-type: none"> • Project branding and key messages • DFID approval on content
b) Application portal	By Month 3	<ul style="list-style-type: none"> • Inputs from an Operations Manual which provides guidance on eligibility, process, scoring criteria, etc. • Inputs from partners on application templates • SME feedback and adjustment based on usability • Integrates a basic Job posting and application section • Includes three to four weeks piloting, testing, and refinement stage
c) Job module		
Stage 2 - 3		
a) Database/CRM Management	By Month 4	<ul style="list-style-type: none"> • Feedback from key stakeholders • Independent Evaluator data requirements • Partner reporting for performance tracking and updated data on SMEs, workers, etc.
b) Monitoring & Evaluations	By Month 5	
c) Portfolio Management	Month 6 onwards	
Stage 3 Job portal	Year 2	TBD (Basic Job Portal should integrate in Stage 1)

Annex A Programme background

- STEP is a 3 year programme, we will aim to launch the project by fall 2017 or early 2018.
- Job creation is a key goal of the programme. We will aim to create 1300 jobs by the end of the project. Thus STEP aims to support several hundred SMEs over the life of the programme with support that is tied to job targets. In Year 1, we may support 250 SMEs and likely similar or smaller targets in Year 2 and 3. We have a target of over 1000+ applications for Round 1 across the country
- The programme has 3 main components:
 - Matching grants - SMEs match up to 50% of funding provided by project
 - Wage subsidies - starts in Year 2 and provided to SMEs to create new jobs
 - Savings accounts for Syrian refugees - project and worker contributions goes into an account to be disbursed at a later stage.
- The main support we will provide SMEs will be matching grants, BDS and in some cases wage subsidies
- We will have an independent evaluator so there is the importance of a good data collection and monitoring system embedded into our portal.
- Data will be fed from multiple sources including SMEs, workers, NGOs, financial partners, BDS partners, project team, etc.
- Our main project delivery partners in Year 1 are 2 microfinance institutions and 1 bank who will support our outreach, selection process and manage the primary relationships with the SMEs that are selected.
- Portfolio Managers are assigned
- To address financing gaps from the SMEs, we hope that our matching grant will serve as personal financing for them to access loans from our financial partners. E.g. SME has financing gap of US\$20,000. We provide \$10,000 and they access loan of \$10,000 from the bank. It can be a 1-1 ratio or flexible in terms of amount of loans leveraged.
- We will also have a network of BDS partners to support our outreach and who we will link SMEs to for services
- We will also aim to build relationships with NGOs or training providers and programmes who deliver existing vocational or skills training so we can have a pool of semi-trained workers needing jobs. We can also identify occupations – plumbing, carpentry, etc – that are high in demand and in the sectors for example, construction, where Syrians can work.

Annex B Draft application & selection process (In progress)

