**TERMS OF REFERENCE (TOR)**
**eSOBI (Education Sector Open Budget Index) Platform Development**

## 1. BACKGROUND
### 1.1 Project Context
The Center for Development and Integration (CDI) Vietnam is implementing the project "Advancing Budget Credibility, Accountability and Participation in the Education Sector in Vietnam", (aBCAP project), funded by the European Union, running from 2025-2028. The project aims to enhance budget transparency, improve public participation, and strengthen oversight in Vietnam's education sector at the subnational (provincial) level.

### 1.2 Education Sector Open Budget Index (eSOBI)
As a key project component, CDI will conduct the Education Sector Open Budget Index (eSOBI) survey across Vietnam's 34 provincial Departments of Education and Training (DOETs) to assess:
- Budget Transparency: Availability and quality of education budget information disclosed
- Public Participation: Opportunities for educators, parents, students, and civil society to engage in education budget processes
- Fiscal Oversight: Strength of legislative and audit institution oversight of education finances

The eSOBI survey will be conducted 2-3 rounds over the 4-year project period (baseline in 2025, pilot 2026,full round 2027 and full launching 2028), generating comprehensive comparative data on education budget transparency across provinces.

### 1.3 Platform Need
To effectively manage, visualize, and disseminate eSOBI survey results and related budget transparency information, CDI requires development of a digital eSOBI Platform that will:
- Serve as a centralized data portal for eSOBI and related budget transparency survey results (eSOBI, OBI, POBI, MOBI)
- Enable data visualization and interactive analysis across 34 provinces and multiple survey rounds
- Support self-assessment functionality for local governments and budget users
- Facilitate stakeholder engagement and feedback on education budget processes
- Integrate with existing platforms (www.ngansachvietnam.net)
- Support capacity building and advocacy through training resources and discussion forums

## 2. OBJECTIVE
To develop a professional, user-friendly, interactive digital platform that serves as a comprehensive data portal for education budget transparency information, survey results, capacity building resources, and stakeholder engagement mechanisms under the eSOBI initiative.
**Primary Users:**
- Provincial Department of Finance, Commune Authority, Provincial Departments of Education and Training (DOETs)
- Budget implementing units (schools)
- Parents, teachers, students, and concerned citizens
- Government officials and policy makers
- Civil society organizations, researchers
- International development partners

## 3. SCOPE OF WORK

**3.1 Platform Architecture & Development**

The vendor shall design and develop a web-based platform with the following core components:

**A. Data Visualization & Interactive Features**

1. **Interactive Provincial Dashboard**
   o Display eSOBI assessment scores for all 34 provinces (3 pillars/ assessment dimensions: transparency, participation, oversight)
   o Interactive provincial map showing performance by color-coding and score range
   o Comparative benchmarking tools (ranking, peer comparison, year-over-year trends)
   o Drill-down capability to individual provinces and detailed assessment findings
   o Multiple visualization options (maps, bar charts, line graphs, gauge charts, scorecards)

2. **Integrated Survey Results Portal**
   o Display results from multiple budget transparency surveys: eSOBI, OBI (Open Budget Index), POBI (Provincial OBI), MOBI (Ministerial OBI)
   o Enable comparative analysis across surveys and rounds
   o Dynamic filtering by province, survey type, assessment dimension, and year

3. **Data Download & Export**
   o Enable users to download raw data in multiple formats (Excel, CSV, PDF)
   o Generate customizable provincial reports
   o Support research and advocacy with open data

**B. Self-Assessment & Survey Functionality**

1. **Interactive Self-Assessment Calculator**
   o Allow all Sub-national Budget holders related to education sector such as Dept of Finance, provincial DOETs, commune authorities and and budget-using units to conduct self-assessment of their budget transparency
   o Integrated scoring system (0-100 points) with automated calculations
   o Real-time feedback and recommendations for improvement
   o Generate action plans based on assessment results
   o Support quarterly/annual tracking of improvement progress

2. **Collaborative Survey Platform**
   o User login functionality for provincial DOETs staff, research partners, and validators
   o Secure data entry and evidence upload (document scans, web links, file attachments)
   o Version control and change tracking
   o Workflow management for data collection → validation → approval → publication
   o Round 1-2: Research teams conduct survey; State Budget Agencies (such as DOETs, Commune) to provides feedback, Research Expert validate data and reports
   o Round 3+: DOETs conducts survey; research teams validate

3. **AI-Enabled Website Auditing**
   o Deploy AI technology to automatically scan provincial DOETs and other commune budget agencies websites
   o Identify and catalog education budget documents
   o Extract publication dates and document metadata
   o Generate automated audit reports summarizing findings
   o Provide baseline data for manual verification by research teams

**C. Capacity Building & Resources Hub**

1. **Training & Guidance Repository**
   o Hosted library of training materials, guides, and toolkits

- o Organize by audience: educators, parents, civil society, government officials, researchers
- o Multiple formats: videos, PDFs, infographics, interactive modules
- o Downloadable resources for offline use
- o Regular content updates and new materials

2. **Knowledge Management**
   - o Knowledge hub on public Finance managenment for Budget Holders (đơn vị dự toán các cấp ngân sách và đơn vị sử dụng ngân sách nhà nước)
   - o Searchable FAQ database on education budgets
   - o Glossary of budget terminology (Vietnamese & English)
   - o Policy documents and legal references on budget transparency
   - o Best practice case studies and success stories
   - o Resource links to partner organizations and government sources

## D. Stakeholder Engagement & Discussion

1. **Public Comment & Feedback Forum**
   - o Allow parents, teachers, students, and citizens to post comments on education budgets
   - o Real-time moderation and community guidelines
   - o Threaded discussions organized by province and topic
   - o Sentiment analysis and issue tracking
   - o Integration with advocacy campaigns

2. **Story Sharing Platform**
   - o Enable users to submit and share stories about education budget impact
   - o Curated story gallery highlighting citizen voices
   - o Multimedia support (text, photos, video testimonials)
   - o Story library searchable by province, theme, and impact type

## E. Administrative & Management Features

1. **User Management**
   - o Role-based access control (public, researcher, DOETs staff, administrator)
   - o User registration and authentication system
   - o Multi-level access permissions

2. **Content Management System (CMS)**
   - o Backend system for easy content updates
   - o Page editing, document uploads, news/story publishing
   - o Calendar scheduling for posts and announcements
   - o Metadata management (publication dates, tags, categories)

3. **Analytics & Reporting**
   - o Track platform usage statistics (visitors, page views, downloads)
   - o Monitor user engagement (survey completions, downloads, comments)
   - o Generate quarterly usage reports
   - o Identify popular content and user behavior trends

4. **Quality Assurance**
   - o Data validation rules and error checking
   - o Regular platform testing and bug fixes
   - o Security audits and penetration testing
   - o Performance monitoring and optimization

## 4. OUTPUTS

The vendor shall deliver the following outputs:

**4.1 Platform**
- A fully functional platform developed with all core features jointly agreed with CDI, and refined based on consultations and testing feedback
- The platform shall be ready for deployment and operational use, including successful completion of soft launch and necessary revisions
- The platform design and functionality shall ensure usability, scalability, data security, and compatibility with CDI's project needs and future survey rounds

**4.2 Source Code & Intellectual Property**
- All source code, databases, and technical documentation shall be provided to CDI upon completion
- CDI retains full intellectual property rights to the platform
- Open-source license preferred where applicable
- Code repositories with version control access for CDI team

**4.3 Support & Warranty**
- 12-month warranty covering all defects and bugs discovered post-launch
- Post-launch support including performance monitoring, security updates, and minor enhancements (for at least 2 next survey rounds)
- On-call support for critical issues during launch period

## 5. WORK PLAN & DELIVERABLES

| # | Activity | Timeline | Deliverables |
|---|----------|----------|--------------|
| **Phase 1: Design & Planning** | | | |
| 1 | Kickoff, finalize requirement and consult stakeholder | February 28, 2026 | Detailed requirement document |
| 2 | Design platform | March 30, 2026 | Platform design |
| **Phase 2: Development** | | | |
| 3 | Develop platform with all core features | April 1 – June 30, 2026 | Platform demo |
| 4 | Prepare deployment plan | June 30, 2026 | Detailed deployment procedures, rollout strategy, contingency plans |
| **Phase 3: Launch & Handover** | | | |
| 5 | Soft-launch: Test the platform with key stakeholders; collect and incorporate feedback | July, 2026 | Refined platform ready for public launch |
| 6 | Public launch: Deliver training sessions; develop user documentation | July – September 2026 | Training presentations, video tutorials, quick-start guides for users |
| 7 | Handover | September, 2026 | Handover Package (including: all source code, databases, documentation, and post-launch support plan) |
| **Phase 4: Post-Launch Support** | | | |
| 8 | Provide post-launch support including performance monitoring, security updates, | 2026 - 2028 | List of minor enhancements implemented |

| | and minor enhancements (for at least 2 next survey rounds) | | |
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## 6. VENDOR QUALIFICATIONS & REQUIREMENTS
**Required Experience:**
- Minimum 5 years of experience in developing and deploying interactive websites or digital platforms.
- Proven experience delivering operational platforms, preferably for research, policy, education, or community-focused projects.
- Ability to design user-friendly interfaces and present data in a clear, accessible way for non-technical users.
- Demonstrated capacity to build secure, stable, and scalable systems, including database management and data protection.
- Experience with public sector, NGO, or donor-funded projects is an advantage.
- Familiarity with the Vietnam context and basic digital compliance requirements is preferred.
- Strong collaboration skills and commitment to full handover of source code, documentation, and knowledge transfer.
- Ability to propose appropriate technical solutions based on project objectives.

## 7. REPORTING & COMMUNICATION
- Weekly reports on development progress, risks, and issues
- Bi-weekly video calls with CDI project team
- Monthly progress meetings with stakeholders
- Quarterly demos of new features and functionality

## 8.  HOW TO APPLY
Interested applicants are invited to submit their Expression of Interest with the subject line "eSOBI Platform" to email tinh.leut@cdivietnam.org by **February 13, 2026.**
The application package should include:
- Comments on this Terms of Reference (if any)
- A detailed technical proposal, including team composition, implementation approach, and timeline, with clarification of the proposed approach for the AI module and multi-round survey functionality
- A detailed cost proposal for the development of the digital platform
- The company/Vendor profile and relevant experience.

Only short-listed candidates will be contacted.