

Questions and answers

Call for proposals: Development of a cooperative Knowledge Base

Released on October 31st, 2018. Version 5.

The present document contains questions received by Cooperatives Europe from potential applicants, and related answers formulated by the project coordinator. It intends to provide applicants with complementary elements, clarifying expectations from the client.

This document is informative only. Candidates should refer to the call for proposals, which contains all criteria to be used by Cooperatives Europe to evaluate and select offers.

Q.1 *It would be helpful if you could point to some concrete example(s) of IT-infrastructure or IT-systems that are similar to what you want*

A.1 We are looking for a software able to combine the feature of some existing open source tools (the following are just examples but they should help you get the idea):

- Wikidata (logic)
- Nextcloud (federation)
- Wikipedia / Findmeevidence.org (querying system interface – to be defined by the UX study)
- Apache Solr (actual querying engine)

The knowledge base is not intended as an e-learning system. It could link to MOOC or other training systems, but it will not include its own courses. It's a reference library more than a classroom.

Q.2 *Will the knowledge base be accessible to edit only to mentors or other specified editors or anyone? What is the intended audience of the knowledge base?*

A.2 Cooperative mentors (i.e. staff members of cooperative federations and training centers) are the initial testers of the platform, but when it goes live there will be different levels of access based on the network that will be built around the platform and beyond the cooperative mentorship network.

There will be at least 4 user roles connected to access levels and editing privileges:

- Anonymous (any visitor)
- Contributor (submitting abstracts and uploading relative documents/links)
- Moderator/reviewer (publishing submitted abstracts and their connected "attachments")
- Admin (managing the users and the roles)

In the first testing phase, mentors will be contributors and staff of project partners will be moderators/reviewers. After the testing, it will go public and any researcher or entrepreneur or curious visitor will be able to use it (at least as anonymous).

Q.3 Who participates in the workshop mentioned in A.3?

A.3 The workshop will take place during a project training geared towards mentors (trainers and staff members of cooperative umbrella organizations). Partners will also be present and the UX workshop should be designed to include the input of everyone, maybe with a focus on the different roles and privileges on the platform.

Q.4 Is it possible to get a copy of research conducted as part of Lot 1?

A.4 The research is not available now. It will be shared with the developers before the beginning of A.1 as a basis for their work.

Q.5 What will be the content types available on the knowledge base?

A.5 Content types which will be made available on the knowledge base will be written text in HTML format (reviews/abstracts).

Content types made available on federated nodes should include multimedia (audio/video), HTML pages, PDF files and other "office" files (Word documents, presentations, reports...).

Q.6 What should the module be? What are the pilot platforms on which the module will be tested?

A.6 The structure envisioned should be as platform-independent as possible. Since the nodes will be hosted on existing partners' websites, we are looking for modules that can be deployed on popular CMSs used by the cooperative movement (as of now, Drupal and WordPress).

The scope of the software may be expanded in the future to include other plugins for different CMSs/frameworks. Given the open source nature of the project, new plugins could also be contributed by others in the future.

Q.7 Will the knowledge base content be mirrored with the plug-in module? Should the knowledge base content be editable just within the site itself, or through partner platforms?

A.7 In our idea, the plugins should not mirror the content, but are just an interface to the querying system. That should enable partners to share on the platform a subset of their own contents, while keeping control over their data, preserving intellectual property and restrict access to some documents/materials.

The features and functionalities of the collaborative space are still to be defined and should be part of the focus of the UX design study.



Q.8 What should be the qualitative and quantitative evaluation criteria which should be relevant to take into consideration for the Activity Report? Which outcomes could be highlighted?

A.8 Qualitative criteria could include: users' level of satisfaction, relevance of the knowledge base with respect to the territories of deployment...

Quantitative criteria could include: milestones to assess the organic development of the knowledge base (number of users expected by the end of the project).

Those criteria are intended for the client and provider to agree on objectives towards beneficiaries, and align our expectations.

Main outcomes highlighted by the activity report should focus on describing key results of the project, insisting on successes and failures.

Q.9 What are the expected deadlines for each of these activities?

A.9 Activity 1 should be completed by the end of 2018.

With respect to Activity 2, a first version could be released by end of January or beginning of February 2019, for a live test with potential beneficiaries (mentors and trainers) end of February. A second version could be released by June 2019, for a live test in July 2019 with a wider number of potential beneficiaries (mentors and ambassadors).

Activity 3 will end with the contract (31 July 2019).

Q.10 Which profile is expected to perform Activity 1? Is the same profile requested for A.1 and A.3 workshops?

A.10 Workshops mentioned in A.1 and A.3 are the same. A UX profile seems more relevant, but it could also be seconded by a developer profile.

Q.11 How should the querying interface be designed?

A.11 All the nodes should be able to search locally, but also show results that you are authorized to get from other nodes.

We are interested in a system which would allow the user to jump from a document to a related relevant document. Sideway browsing could be useful in this respect.

Categorizing the content in different ways is also relevant. Information should be accessible in different ways, in order to overcome the limits of structured research.

Q.12 What are the expected constraints related to an international exploitation of the system?

A.12 The project will be global: it thus needs to be designed to be multilingual. A way of linking translations of abstracts and contents would be a relevant feature.

Q.13 Which organizations are expected to participate in the in-house workshops?

A.13 Three categories of partners have expressed their interest in this knowledge base:

- Members of Cooperatives Europe and the International Cooperative Alliance: national federations of cooperatives, active in supporting new and existing cooperatives, and advocating towards policy-makers;
- Training centers and universities (cooperatives and non-cooperatives);
- Youth organizations and young entrepreneurs who need to have access to information related to knowledge about the cooperative movement, and tools for starting up and managing a cooperative.

Q.14 How do you envision a querying system able to search through a wide diversity of formats and contents?

A.14 We expect every content to be described in an abstract. Development of the standard abstract form and of a categorization/tagging system is an integral part of A.2. Good existing examples include medical review platforms, such as PubMed and FindMeEvidence.

Q.15 Who is the UX partner referred to in A.1, “close collaboration with UX partner”?

A.15 No external UX partner will be involved.

The present lot includes both development and UX design. The contractor will be expected to deliver both tasks, but also to appoint two different experts in charge of each task.

“Close collaboration with UX partner” should thus be understood as internal collaboration between each expert (i.e. the person in charge of development and the person in charge of UX).

End.