



# **IPPF MEMBER ASSOCIATION DASHBOARD DEVELOPMENT**

**REQUEST FOR PROPOSALS**  
**DUE BY: November 11, 2022**

Member Association Dashboard Development Team (MDDT)  
October 27, 2022

# Request for Proposal – IPPF Dashboard Development

Contents

## Table of Contents

Background.....	3
Objective.....	3
Key Features of the Solution .....	5
MA Dashboard Phasing .....	6
Scope of Work .....	7
Payment terms .....	9
Proposal Requested.....	10
Disqualification .....	12
Clarification of Request for proposal.....	13
How to apply.....	13
Contact Information .....	13

## Request for Proposal – IPPF Dashboard Development

### Background

International Planned Parenthood Federation (IPPF - <https://www.ippf.org/>) is a global service provider and a leading advocate of Sexual and Reproductive Health and Rights (SRHR) for all. It works to deliver this through its worldwide network of 120 Member Associations, working in in 129 countries, with an active presence in further 13 countries, totalling 142 countries. Its secretariat offices, headquartered in London, UK with sub offices in New York (USA), Canberra (Australia), Geneva (Switzerland) with six Regional Offices in Africa (Nairobi, Kenya/ Côte d'Ivoire, Abidjan); Arab World (Tunis, Tunisia); Americas and Caribbean (Columbia and Trinidad & Tobago); Europe (Brussels, Belgium); South Asia (New Delhi, India) and East, Southeast Asia and Oceania (Kuala Lumpur, Malaysia/ Fiji).

IPPF's work is wide-ranging, including comprehensive sexuality education, provision of contraceptives, safe abortion, maternal care, and responding to humanitarian crises. We pride ourselves on being local through our member associations and global through our worldwide network. At the heart of our mission is the provision of – and advocacy in support of – integrated healthcare to anyone who needs it regardless of race, gender, sex, income, and crucially no matter how remote.

We deliver our mission through 120 autonomous members (also known as Member Associations (MAs)) with a presence in over 145 countries. MAs are IPPF accredited autonomous organizations within country.

Volunteerism is central to our healthcare delivery. It underpins the vital work of our members and their teams, whether through community outreach and distribution of contraceptive care or the regional Youth Action Movements championing change.

In this context, IPPF is inviting proposals from agencies /firms (hereafter referred to as 'Consultant') for development, implementation and maintenance of an interactive cloud-based platform ("MA Dashboard") to host information on and facilitate structured interactions among its 120 Member Associations. This endeavour will be hereafter referred to as "Project".

### Objective

The objective of this tender is to identify a Consultant who will assist IPPF in implementation of Data warehouse and Business Intelligence Project called "MA Dashboard" project.

As part of implementation of the MA Dashboard, the consultant will

- Undertake stakeholder analysis,
- Understand data sources/ system integration requirements,
- configure the data warehouse,
- integrate existing data sets from identified sources/ systems including setting a pathway of integration with systems that are still under development,
- configure dashboard solution (in the form of graphs/ charts and text, etc) at the global, regional and country levels and
- make these available to stakeholder groups through collective and differentiated dashboards.

## Request for Proposal – IPPF Dashboard Development

The purpose of the MA Dashboard is to enable MAs and IPPF staff to visualize and analyse data through dynamic dashboards and reports that pull and display data from an array of platforms owned and/ or managed by IPPF. These dashboards could also be used, to publish IPPF results externally as and when required. Examples of data to be displayed on the MA Dashboard include country context, overview organizational goals and objectives, operation delivery mode of the MAs, organisation structure along with key board and staff members details including contacts, key performance indicators (KPIs) like impact and output numbers in terms of service delivery and other programmatic interventions, accreditation status/ follow up, audit status/ follow up, plans and budgets and their trends over a period in time, etc. This dashboard will allow seamless engagement between both MAs and IPPF Secretariat staff enabling collaboration along structured workflows and pre-defined business processes.

The MA Dashboard should be based on an off-the-shelf platform (not built from scratch) which the Consultant may customise to meet IPPF's specific requirements. The MA Dashboard should be setup with clear organisational hierarchy, ensuring data security and access right control and use of a modular approach to configuration, that would enable iteratively adding KPIs and dashboards as and when related data is available. This would mean, initial KPIs and dashboards will be set up using the immediately available datasets while others will be added as and when new systems, are fully deployed and rolled out. Read the pictorial presentation of the solution along with the "Roadmap for modules development" section below for more information on this.

The data sets and its analysis should be configured in a way that enables presentation of interdependencies, correlation between data elements, enable integration/ interaction within themselves and with other institutional information systems in place, such as NetSuite (<https://www.netsuite.com/>) and DHIS2 (<https://dhis2.org/>), bespoke applications (.net based) capturing process and outputs relating to accreditation of MAs, particularly allowing to capture data from these systems for display on the Dashboard. Additionally, there are some data sets that are currently available in excel files which has been used to publish key KPIs, which too would be required to be published on the MA dashboard. These are the ones, where IPPF is working on plans to automate the process to collect these data sets. Some of these include business plans of MAs, local income generated at the country level, etc.

A visual representation of the proposed solution and its integration requirements is presented below.

## Request for Proposal – IPPF Dashboard Development



**TECHNICAL FEATURES**

- Cloud-based
- Language localization
- Unrestricted global access
- User access control
- Open data through APIs
- Mobile friendly
- Low-bandwidth friendly
- Customizable
- Reporting
- File Management
- Workflows
- Relationship Management
- Interoperability
- Online collaboration
- Data security and GDPR compliance
- Solution design scalable (+ users/processes)
- User-friendly interface with responsive design.
- Application-level performance considerations.
- All licenses/solutions as IPPF Property
- Integration of active directory for single sign-on

**IPPF MA DASHBOARD**



**Centralised control panel**

**APIs**

- NETSUITE
- dhis2
- G
- Prism

**BUSINESS INTELLIGENCE**

- CRM
- CHAT BOT

**BUSINESS PROCESS AUTOMATION**

- Global ERP
- Global Statistics and Global Indicators Platform
- MA profiles (key information/country context)
- Business planning and reporting processes
- Membership Accreditation process
- MA peer support (Expertise/Capacity Sharing Log)
- Commodities management (basic data from BP)
- KPI analysis based on Strategic Framework indicators
- Data analysis (Stats/Global/Strategic Indicators)
- References Section (Guidelines/Calendars/Focal points)
- CRM for comms with MAs (Customers)
- Volunteer database module
- Chatbots for automated support
- Other processes

### Key Features of the Solution

IPPF expects the solution that will be developed must contain the following key features:

- **Language localization:** possibility to show content in different languages, particularly IPPF’s official languages (English, Spanish, French, and Arabic).
- **Unrestricted global access:** absence of any legal limitations on using the platform in any country or geographical region/ country.
- **Centralized admin panel:** availability of administration functions that can be centrally managed to ensure controlled access to different sections, databases, documents, logs, and key admin functions like user accounts and access rights management. This should enable setting up of different types of users with different permissions (e.g.: internal, external) - admin, regular user, data entry operators, etc.
- **Open data:** possibility to allow access to the platform’s data by a broad range of external platforms (e.g.: through APIs). Furthermore, integration with popular data visualization tools is a desirable.
- **Mobile friendly:** possibility to view and interact with the platform (e.g.: entering data) on mobile devices such as smartphones and tablets.
- **Low-bandwidth friendly:** possibility to view and interact with the platform offline and/or in situations of low-bandwidth.
- **Customizable:** possibility to create different types of pages/profiles (e.g.: clients/customer/partner, donor, projects, country, etc.) with different attributes that can be used for searching and filtering purposes (e.g.: to automatically generate a list of countries in which a project is being implemented), containing multiple sections each potentially containing different types of data (e.g.: narratives, financial data, media) that can be individually extracted from pages and displayed in a list/report.
- **Reporting:** possibility to generate, extract (including, potentially, both narrative and numerical data) and publish internally and externally reports/ KPIs on different online and off-line platforms from the platform)

## Request for Proposal – IPPF Dashboard Development

- **Workflows:** possibility to set up and carry out workflows as structured interactions between users (both internal staff members and external partners) tracking of the progress made (e.g.: assignees, statuses, etc.)
- **Relationship Management:** possibility for users to communicate with each other on the platform and 1) automatically document the communication (possibly integrating with email threads); 2) mark specific messages with status tags (e.g: “follow up”; “completed”; “technical support request”, etc.)
- **Interoperability:** the platform seamlessly communicates with various IT platforms owned and managed by IPPF, including: local clinic systems (MA level); local ERPs (MA level); DHIS2 (global); NetSuite (global).
- **Online collaboration:** document synchronization, collaborative editing, versioning control.

### MA Dashboard Phasing

The table below lists the high level phasing of datasets and modules that are to be configured and published on the MA Dashboard. These will not be developed by the Consultant as part of this project. However the Consultant is expected to configure the MA Dashboard in a way that as and when datasets are available they could be plugged into the configured system and easily published.

Additional guidance, detailed workflows, and content information for each of the processes listed below will be provided to the selected Consultant.

Current list of data sets/ modules that will be required to be integrated into the MA dashboard as indicators are listed below:

Datasets and modules
<p><b>Phase 1 – MA Business plans and accreditation data</b></p> <ul style="list-style-type: none"> <li>• Member Association profiles with key MA information and country context.</li> <li>• Awards signed and grants paid to Member Associations by IPPF (from NetSuite).</li> <li>• MA Business plans, including the mid-year and the end-of-year reporting.</li> <li>• Membership Accreditation.</li> </ul>
<p><b>Phase 2</b></p> <ul style="list-style-type: none"> <li>• Data analysis of Service Statistics and Global Indicators / Strategic Indicators 2023-2028 – collected using DHIS2.</li> <li>• KPI analysis based on Strategic Framework indicators.</li> <li>• MA peer-support marketplace (including Expertise mapping and Capacity Sharing Log)</li> </ul>
<p><b>Phase 3</b></p> <ul style="list-style-type: none"> <li>• <b>Commodities management (pricing &gt; stock management &gt; forecasting &gt; POs).</b> Data partly in excel and partly in NetSuite.</li> <li>• References Section (Guidelines / Calendars / Focal persons).</li> <li>• CRM for communications with MAs.</li> </ul>
<p><b>Phase 4</b></p> <ul style="list-style-type: none"> <li>• Chatbots for automated support.</li> </ul>

Note: the list of datasets and modules reflects a snapshot of business processes in place at IPPF today. IPPF is completing the redesign of its Strategic Framework that will be presented to the General Assembly in November 2022. Changes and adaptations from the new Strategic Framework might result in revised and/ or new institutional

## Request for Proposal – IPPF Dashboard Development

processes. These changes will be communicated to the Consultant in order to accommodate them in the MA Dashboard.

### Scope of Work

This section provides a high-level information about the overall scope of work expected from the Consultant for the select process areas. The overall scope of work shall include the following activities:

Steps	Activity	Deliverables	Timeline
1.	<p><b>Project Inception / Kick-off</b></p> <ul style="list-style-type: none"> <li>• Signing of contractual terms and conditions including total cost and payment milestones. The final contract will include the request for proposal, selected proposal and proof of concept and any other agreements reached between IPPF and the selected consultant, as attachments.</li> <li>• Develop a detailed work plan with deliverables, timelines and team deployment plan. This will serve as a monitoring tool of progress and deliverables.</li> <li>• Sign off by IPPF</li> </ul>	<p>Contract signed</p> <p>Inception Report with Project Plan</p>	To+2 week
2.	<p><b>To-Be Design</b></p> <ol style="list-style-type: none"> <li>1. Analyse the audience requirements for the dashboard at various levels – country/ region/ global.</li> <li>2. Analyse available process map (s)/ data/ system (s)/ recommendation notes/ reports.</li> <li>3. Work with IPPF to develop KPIs/ graphs/ text required</li> <li>4. Prepare data requirements, sources of integration/ KPIs, Graphs and texts to be configured current processes / process maps and key requirements / expectations.</li> <li>5. Based on the above, prepare the to-be state of the data capture, configuration of dashboards and utilisation of KPIs, graphs/ texts at each level, including the process and responsibilities of updating data sets and ensuring quality controls.</li> <li>6. Present the to-be state to the key stakeholders for suggestions / inputs.</li> <li>7. Submit the ‘To-Be Design Report’.</li> <li>8. Get this signed off by IPPF.</li> </ol>	To-Be Design Report	To+6 weeks
3.	<p><b>System Design &amp; Specifications</b></p> <ol style="list-style-type: none"> <li>1. Develop a clear understanding of deployment (SAAS/ cloud) and required sizing and cost of ICT infrastructure/ licensing requirement, etc., taking into consideration both the Business Continuity and Disaster Recovery aspects</li> <li>2. Prepare and submit the ‘System Design &amp; Specifications Report’.</li> <li>3. Get this signed off by IPPF.</li> </ol>	System Design & Specifications Report	To+ 8 weeks
4.	<p><b>Configure/ develop, test</b></p> <ul style="list-style-type: none"> <li>• Install/set up the platform - (preferably under Software as a Service (SaaS) model) in a secure cloud environment accessible from the countries with lower bandwidth.</li> <li>• Develop / configure/ customise the solution based on the system design and specification report.</li> </ul>	UAT report	To+ 10 weeks

## Request for Proposal – IPPF Dashboard Development

Steps	Activity	Deliverables	Timeline
	<ul style="list-style-type: none"> <li>• Demonstrate prototype for visual appreciation and additional suggestions gathering.</li> <li>• Develop/customise the solution along with the required integration with the concerned systems (e.g.: the Consultant will establish the necessary system elements to interoperate with the the DHIS2 Global Statistics and Performance Indicator Platform, NetSuite Oneworld ERP and others.)</li> <li>• Test the entire solution vis-à-vis the requirements and functionalities and address issues, if any, that may arise.</li> <li>• Import master data / data, if required.</li> <li>• Support IPPF in undertaking the UAT (User Acceptance Testing)</li> <li>• Submit the 'UAT Report' including tester use cases with test results.</li> </ul>		
<b>5.</b>	<p><b>Go - Live</b></p> <ul style="list-style-type: none"> <li>• Based on the To-Be Design report, configure the overall solution architecture detailing various components and technical translation of requirements along with integration interfaces</li> <li>• Post UAT, deploy the solution on the cloud-based ICT infrastructure provided by IPPF, as per the requirements provided by the Consultant.</li> <li>• Conduct performance testing on the deployed infrastructure.</li> <li>• Conduct at least two master training for the identified stakeholders</li> <li>• Develop a 'Training Manuals/ User Manuals/ videos' for cascading similar trainings.</li> <li>• Post deployment and training, check the go-live readiness and make the system live.</li> </ul>	<p>Training Manuals/ User Manuals/ videos</p> <p>MA Dashboard migrated to production – go live</p>	To+12 weeks (Tg)
<b>6.</b>	<p><b>Post Implementation Support:</b> Post Go-Live provide support in maintenance of the solution and conduct following routine activities:</p> <ul style="list-style-type: none"> <li>• Routine pro-active monitoring, maintenance and troubleshooting support.</li> <li>• Manage and resolve issues or tickets raised by the users.</li> <li>• Provide remote infrastructure administration support, if required.</li> </ul>	Monthly Project Status Report and Invoice	Tg+12 months
<b>7.</b>	<p><b>System Augmentation</b> During the tenure of the contract, the following requirements may also arise:</p> <ul style="list-style-type: none"> <li>• Publish more KPIs/ dashboard on the solution (as more solutions are developed and ready to roll out).</li> <li>• Conducting additional training sessions for MA Dashboard implementation, post Go-Live.</li> </ul> <p>All such requirements will need to be supported by the Consultant as and when intimated in writing. These will be handled under change request with mutual discussions and agreement on timelines, efforts and other costs, utilising the available pro-rata rates as quoted by the Consultant.</p>	TBD	TBD (outside the scope of this RFP)
<b>10</b>	<b>Other Requirements:</b>		



## Request for Proposal – IPPF Dashboard Development

Steps	Activity	Deliverables	Timeline
	<p>In configuring the solution, the Consultant shall ensure that following requirements are met in the solution being developed for IPPF:</p> <ul style="list-style-type: none"> <li>• Data security and GDPR compliance is being met.</li> <li>• Solution design is scalable so as to add more users and processes.</li> <li>• User friendly interface with responsive design.</li> <li>• Application-level performance considerations.</li> <li>• All license / solutions to be purchased in the name of IPPF.</li> <li>• Provide recommendations on process/ system improvements (if required).</li> <li>• Configure the Data warehouse and Business Intelligence reports in a way that the users with reasonable bandwidth can generate the dashboard in seconds.</li> <li>• For report generation, it is expected that the platform can generate offline report and users can be sent reports in a scheduled manner.</li> </ul>	Commitments section in the Contract	To be included in Contract

### Notes:

- IPPF shall normally review and convey their observations/ comments for each stage within mutually agreed timeline from the receipt of deliverable. Any delay due to delay in review by IPPF shall not be treated as a delay on account of the selected Consultant.

### Payment terms

The amount of fee shall be payable to the firm, linked to specific deliverables, as per the following terms.

S.No	Milestones	Payment Terms
<b>1)</b>	<b>Go – live phase</b>	
<i>i)</i>	<ul style="list-style-type: none"> <li>• Signing of the contract</li> <li>• Submission and approval of inception report</li> <li>• Valid invoice</li> </ul>	<ul style="list-style-type: none"> <li>• 10% on consultant fee – Go Live phase (a)</li> </ul>
<i>ii)</i>	<ul style="list-style-type: none"> <li>• Submission and approval To-Be Design report</li> <li>• Valid invoice</li> </ul>	<ul style="list-style-type: none"> <li>• 10% of consultant fees – Go Live phase (a)</li> </ul>
<i>iii)</i>	<ul style="list-style-type: none"> <li>• System Design &amp; Specifications report</li> <li>• Valid invoice</li> </ul>	<ul style="list-style-type: none"> <li>• 25% of consultant fees – Go Live phase (a)</li> </ul>
<i>iv)</i>	<ul style="list-style-type: none"> <li>• UAT test report signed off</li> <li>• Valid invoice</li> </ul>	<ul style="list-style-type: none"> <li>• 10% of consultant fees – Go Live phase (a)</li> </ul>
<i>v)</i>	<ul style="list-style-type: none"> <li>• Go live – MA dashboard (phase 1 of KPIs)</li> <li>• Training and User manual developed and signed off</li> <li>• Valid invoice</li> </ul>	<ul style="list-style-type: none"> <li>• 45% of consultant fees – Go Live phase (a)</li> </ul>
<b>2)</b>	<b>Post Implementation Support</b>	
<i>i)</i>	<ul style="list-style-type: none"> <li>• Submission and approval of monthly progress report</li> <li>• Valid monthly invoice</li> </ul>	<ul style="list-style-type: none"> <li>• Total Fee (b)/ 12</li> </ul>
<b>3)</b>	<b>System Augmentation</b>	
	<ul style="list-style-type: none"> <li>• Change report action taken</li> <li>• Valid invoice (as per agreed effort estimation and fee)</li> </ul>	<ul style="list-style-type: none"> <li>• Total Fee as per invoice</li> </ul>

## Request for Proposal – IPPF Dashboard Development

### **Note:**

- IPPF would cover travel cost (i.e. only economy class airfare or similar including out of pocket expenses, whilst on travel as per IPPF’s travel policy) for one person to all locations to be covered as part of this assignment with prior itinerary approval from the single point of contact provided by IPPF.
- All other costs shall have to be borne by the Consultant.
- All payments shall be payable on submission and approval of the invoice along with deliverable.
- Financial quote as per desired format of the TOR needs to be provided in US\$ only.

### **Proposal Requested**

The interested party shall submit the bid as per the above Request for proposal. Bids not satisfying the technical evaluation criteria shall be rejected. The bids need to be prepared and submitted in the format provided below. Incomplete submission or non-adherence to the specified format may result in rejection of the bid.

### **Technical Bid Format**

The bidder will submit their technical proposal in the following technical bid format.

#	Particulars	Details to be provided
1.	Bidder details	Bidder should provide details of: <ul style="list-style-type: none"> <li>● Bidding legal entity.</li> <li>● Geographical presence and experience of the firm</li> <li>● Service portfolio.</li> <li>● Pool of skill sets available with the firm.</li> </ul>
2.	Bidder should not have been blacklisted by any Government /Non-Government Institution	A self-declaration in this regard shall be provided by bidder and should be signed by authorized signatory
3.	Past Relevant Experience of the firm	Bidder should provide the details of relevant experience (in the forms of citations for similar work undertaken by the bidder) that best illustrates their ability to provide the services required as per the TOR. A minimum of 2 citations about similar client projects and references of work conducted must be presented.  The bidder should confirm that if the bid is successfully short-listed, they will provide contact details for the 2 clients and that they can be contacted for reference purposes.
4.	Approach & Methodology proposed for the project	Bidder should provide overall approach & methodology to cover minimum details in terms of following: <ul style="list-style-type: none"> <li>● Understanding of the project and its objectives.</li> <li>● Overall approach and its responsiveness to the objective of the assignment.</li> <li>● Methodology to be adopted.</li> <li>● Project Plan.</li> </ul>
5.	Proposed Solution Compliance Matrix	Bidder to provide a compliance matrix that highlights the solution being proposed complies with the key features of the solution presented in the relevant section of this RFP.
6.	The Bidder’s Project Manager should have at least 5 years of experience in	Summary of experience in development and implementation of similar dashboard projects undertaken in the last 5 years

## Request for Proposal – IPPF Dashboard Development

#	Particulars	Details to be provided
	development and implementation of similar dashboard solutions.	
7.	Detailed CVs of proposed Project Manager (refer requirement stated in technical evaluation section) and other key resource/team members along with their roles / responsibilities.	<p>Attach documentary proof (detailed CV along with certifications) of list of personnel to be deputed exclusively for the project along with their qualification and experience.</p> <p>Please note that the Project Manager proposed shall be the single point of contact and shall not be changed without the written approval from IPPF</p>

Proposals should not be more than 20 pages.

IPPF may also request the top three bidders to demonstrate or show the Proof of Concept (POC) of the solution being proposed and consider the same for evaluation.

One week intimation shall be given to the bidders prior to the date of demonstration / POC. Please note IPPF shall cover a maximum of US\$ 1000 as cost for preparation of the proof of concept. No further cost incurred by the Consultant related to the bid preparation including preparation of demo or POC shall be covered by IPPF.

### **Financial Bid**

The Financial Bid for proposal should be submitted by the interested bidders in US\$, in the format presented below.

Particulars	Total Amount (US\$) Excl. VAT
Go – Live Fee	
<b>Total (a)</b>	

### **Post Implementation Support Cost (F4)**

S. No.	Resource Profile	No. of Resources (i)	No. of Person-Days (ii)	Person-Day Rate (US\$) exclusive of VAT (iii)	Total Cost excluding VAT (US\$) (i x ii x iii)
1					
2					
3					
<b>Total cost for Post Implementation Support exclusive of VAT (b)</b>					

### **System Augmentation (resource fee/ per day)**

S. No.	Resource Profile	No. of Resources (a)	Person-Day Rate (US\$) exclusive of VAT
1			
2			
3			

Key considerations on the financial format above

## Request for Proposal – IPPF Dashboard Development

- Only those Bidders who qualify the technical evaluation shall be shortlisted for financial evaluation.
- Providing Price bid other than this format may lead to rejection of the bid.
- The Lowest Bidder (L1) will be selected on the basis of total price quoted.
- Final financial quote need to be in US\$.
- The above bid is only for the consultant’s cost. For the project, IPPF may have to procurement software licenses for the platform presented, which will be actioned by IPPF separately. As part of proof of concept, IPPF would expect the consultant to share indicative cost for the proposed solution. This shall not be counted towards financial evaluation of the proposal.

IPPF will not make any additional payments apart from the amounts quoted in the above provided format.

- The above rates shall be fixed and remain valid for the entire contract duration.
- Payments will be made as per the payment terms mentioned in this document.
- The payment for tasks/ activities related to ‘Augmentation Support’ shall be mutually deliberated and agreed upon, as part of the change request procedure. However, the pro-rata rates wherever exists in the above financial quotes shall be used to derive the cost.

Authorised Signatory of Bidder \_\_\_\_\_

Business Address \_\_\_\_\_

Date: \_\_\_\_\_

Place: \_\_\_\_\_

### Disqualification

The proposal/ bid is liable to be disqualified in the following cases:

- Proposal not submitted in the formats prescribed in this document.
- Revision of quotes, during validity of the proposal, or its extended period, if any.
- Proposal is conditional to the terms and conditions (not part of this Terms of Reference) and/or deviates from the terms and conditions of TOR.
- Proposal is received after due date and time unless specific waiver sought from and granted by IPPF.
- Information submitted in bid is found to be misrepresented, incorrect or false, at any time during the processing of the proposal/ contract (no matter at what stage) or during the tenure of the contract including the extension period, if any.
- Bidder tries to influence the proposal evaluation process by unlawful/corrupt/fraudulent means at any point of time during the bid process.
- In case any bidder submits multiple proposals or if common interests are found in two or more bids/bidders, the bidders are likely to be disqualified, unless additional bids are withdrawn upon notice immediately.

## Request for Proposal – IPPF Dashboard Development

### Clarification of Request for proposal

A prospective bidder requiring any clarification on the RFP may notify IPPF by e-mail. They shall submit any queries related to the RFP document in the following format in excel or word format only to [mddt@ippf.org](mailto:mddt@ippf.org) latest by 2<sup>nd</sup> December 2022. The responses (explanation of the query but without identifying the source of the inquiry) to these queries shall be uploaded on the website of IPPF ([www.ippf.org](http://www.ippf.org)) for ready reference of all prospective bidders.

S. No	Page No	Reference	Queries	Recommendations/Explanation of the Bidder << Name of the Bidder>>

### How to apply

Proposals must be sent via email to the email address: [mddt@ippf.org](mailto:mddt@ippf.org) no later than [December 2nd, 2022].

The Bids (Technical and Financial) must be received by IPPF in the requisite format as mentioned above no later than <<5 PM BST on 18/11/2022>>

### Contact Information

For questions or concerns regarding this RFP, send your enquiries via email to: [mddt@ippf.org](mailto:mddt@ippf.org).

**Query 1: Scope of work - How many core systems would be required?**

Response: The platform should be able to pull data from a range of IT systems owned and managed by IPPF, including (required): Netsuite, DHIS2, Google Suite, Microsoft 365 (particularly MS Excel), Prism (Bespoke application on .net/SQL).

The project is divided into multiple phases as described on RFP page #6. The first phase would consist of integration of 4 solutions as mentioned below:

- Member Association profiles with key MA information and country context
- Awards signed and grants paid to Member Associations by IPPF (from NetSuite).
- MA Business plans, including the mid-year and the end-of-year reporting.
- Membership Accreditation.

**Query 2: Scope of work - Proposed timeline is less and would request if the timelines can be increased for each stage**

Response: MA dashboard is a business-critical system for IPPF, and it is expected that the timelines mentioned in the RFP are followed, however, the consultant would be allowed to change the timelines mentioned for each stage within overall time limit mentioned in the RFP.

**Query 3: Scope of work - Is data migration required, if yes please share the details and volume**

Response: The MA Dashboard will pull (not necessarily migrate) selected data from multiple sources in the data warehouse and consequently the data analysis and visualization will be accessible to users based on their profile/roles.

**Query 4: Payment terms - We would request please consider to release at least 25% consultation fee at the time of contract sign off and to start the project**

Response: No change in Payment terms

**Query 5: Payment terms - Request to please consider 25% consultation fees on each miles stone**

Response: No change in Payment terms

**Query 6: Post Implementation Support Cost - Please share the number of resources would be required**

Response: The Post Implementation Support would be required virtually. Consultant would need to ensure that the issues are resolved in a timely manner, the support cost needs to be provided by the Consultant to ensure that the users are provided timely support. IPPF expects the Consultant to share the service level agreement (SLA) matrices. The number of resources required would need to be defined by the Consultant. The Consultant's team would need to conduct routine activities as defined in the RFP document.

**Query 7: Post Implementation Support Cost - Please confirm support resource would require onsite or virtual**

Response: All Post go-live support will be provided remotely via Microsoft Teams (or similar software)

**Query 8: System Augmentation - Please share the number of resources would require**

Response: As an approach, IPPF would want that the Consultant will study the requirement and will prepare a To-Be-Design report to showcase Consultant's understanding of the IPPF requirements that will be signed-off by IPPF. The System Augmentation section of RFP is to

include the requirements that are not defined in the scope of work therefore it has been mentioned as “TBD (To Be Determined), outside the scope of this RFP”. These requirements will be handled under change request with mutual discussions and agreement on timelines, efforts, and other costs, utilising the available pro-rata rates as quoted by the Consultant. The consultant will provide consultant wise rates - the assessment of cost, will be determined in number of days and then the rates will be as per the rates accepted by IPPF in the signed contract

**Query 9: Objective - Does any Data Enrichment required**

Response: IPPF need to analyse business data stored in multiple data sources. Data needs to be loaded to the Data Warehouse to get a holistic view of the data. Since the data is coming from multiple disparate systems, data cleansing would be required, data enrichment (adding supplementing data to existing data) may be required in case some KPIs are not available. The consultant would need to extract, clean, transform and load data in a format to enable MAs and IPPF staff to visualize and analyse meaningful data through dynamic dashboards.

**Query 10: Objective - Do user has the ability to Update/ Save data**

Response: Users have the ability to update/save data in the source system. Once the data has been processed with proper ETL integration to extract, transform, and load the information users should have the ability to view data in appropriate visualization/tabular format and the user should be able to download/export data or visualization.

**Query 11: Objective - Current User Management and Authentication/ Entitlements**

Response: User Management and authentication would need to be implemented as part of MA Dashboard project. This would be different from the User Management and Authentication / Entitlements defined in the source system and therefore would be required as a module in MA Dashboard project.

**Query 12: Objective - Does application loads data from public API's**

Response: Data would be coming from multiple sources and each source systems would have to be treated differently. APIs are available for Oracle NetSuite, DHIS2 etc. however for bespoke application like Prism for Membership Accreditation (.Net/SQL) and Business Planning and reporting processes (Google Sheets) consultant will have to study and work with existing service provider to develop the process.

**Query 13: Will there be any Private data displayed on the Dashboard.**

Response: The data published on the dashboard may have some private data like the names of the board and senior management team members – other than that most data would typically be not for named individuals (assuming that is what you mean by private data). Personally identifiable information (PII) which refers to client information is confidential and will never be displayed in the Dashboard. Only aggregated and de-identified data could be displayed in the Dashboard.

**Query 14: Does the Dashboard load Dynamic Data**

Response: Yes, depending on periodicity of collection of data in the primary system. The data coming from multiple sources would be in structured format.

**Query 15: Is the data distributed in more than one data base/ Schema**

Response: Yes, the data coming from the Google sheet/Excel file may come from different files

**Query 16: Is this is External application or Internal application**

Response: The MA Dashboard would be internet facing; Internal for IPPF users and External from other existing institutional systems

**Query 17: What Languages are supported**

Response: As mentioned in RFP document, the system should be able to display content in English, Spanish, French, and Arabic languages.

**Query 18: Export to Excel/ Download to PDF is required?**

Response: Yes, features like Excel Download and export to PDF are required.

**Query 19: Any Documentum tool currently getting used**

Response: IPPF uses Microsoft cloud technologies and use SharePoint for storing documents.

**Query 20: Does the Dashboard has multiple templates based on user profile**

Response: The system should allow creation of User Roles (for various categories of users) accordingly the dashboards should be able to display information based on user roles/profiles. Relevant information should be classified according to IPPF decision levels (i.e. Top Management (DLT), Global Managers, Regional Directors, MA Executive Directors)

**Query 21: Any secured Document store currently available**

Response: IPPF uses Microsoft cloud technologies and use SharePoint for storing documents.

**Query 22: How many environments are required before Production**

Response: Apart from development environment where Consultant will do the development/testing, IPPF would need a Pre-Production/UAT environment which will be required for the validation and sign-off purposes.

**Query 23: P.10 item 5 – this mentions a compliance matrix. Is there a separate document for this or is this a feature match to the 'Key Features of the Solution' section on page 5**

Response: Feature match corresponds to the key 'Features of the Solution' section on page 5.

**Query 24: P.12 – Financial Bid – our understanding is that only services/consultant time is to be costed and to exclude any software costs**

Response: The Financial Bid should include all the costs (software license, infrastructure, consultant time etc.; in case a SaaS solution is proposed the associated cost per user per month)

**Query 25: P.6 – 4 phases are listed, should costings only be provided for Phase 1 or for Phase 1 and an estimate for phases 2-4.**

Response: Correct.

**Query 26: For phase 1, please can you provide an estimated number of sources of data for dashboards (a source example would be NetSuite or MS Excel)**

Response: Netsuite, DHIS2, Google Suite, Microsoft 365 (particularly MS Excel), Prism (Bespoke application on .net/SQL).

**Query 27: For phase 1, please can you provide the volume of Member Associations**

Response: About 120