

## Contractor Application – Terms of Reference

### Project: IPPF Business Planning and Reporting Portal

Applications must address all of the requirements of the Terms of Reference and include all of the information/documents requested at Section 7. Send your application to [CERICHSEN@IPPF.ORG](mailto:CERICHSEN@IPPF.ORG)

Please submit your proposal by no later than 12 January 2024

<b>1. Background</b>	<p><u>Overview of IPPF</u> The International Planned Parenthood Federation (IPPF) is a global service provider and advocate of sexual and reproductive health and rights for all. IPPF is made up of 120 Member Associations (MAs) and 15 formally affiliated 'Collaborative Partners, and a secretariat that is spread over 10 offices worldwide. IPPF currently works in 142 countries.</p> <p><u>Overview of the engagement</u> Each year, grant-receiving Member Associations submit detailed organizational budgets and plans to the IPPF Secretariat. The plans and budgets are known as business plans. The business planning template is an Excel workbook. Once submitted, the data is verified and stored in an online database that produces reports against key performance indicators.</p> <p>Thereafter, during the year, the Member Associations submit their half yearly and annual updates against the business plan, and at the end of the year, provide an updated plan and budget for the subsequent year.</p> <p>IPPF is looking for a consultant who can develop a bespoke web-based input portal for the business planning and reporting data. The portal must be user-friendly, secure, and accessible to all Member Associations. The portal must improve data quality by providing clear instructions and limitations on input. The input must be accessible to several administrators. The portal must produce an excel sheet that can be imported into the existing database.</p> <p><u>Key stakeholders</u></p> <ul style="list-style-type: none"> <li>• Director of MA Development &amp; Impact Division</li> <li>• Director of Finance &amp; Technology Division</li> <li>• Director of Strategy &amp; Planning</li> <li>• Business Analyst</li> <li>• Strategic Assistant</li> </ul>
<b>2. Purpose</b>	<p>To establish a streamlined and user-friendly web-based input portal, enabling MAs to directly submit their business plans, half yearly and annual reports. This portal feeds an existing and centralized system of data storage and management.</p> <p>The portal will replace the current Excel-based process, significantly enhancing our data processing efficiency and the overall effectiveness of our strategic planning and budgeting operations. The specific objectives are:</p> <ol style="list-style-type: none"> <li>1. Centralized Data Management: Replace the current Excel-based process with a secure, centralised system for storing and managing business planning and reporting data.</li> </ol>

	<ol style="list-style-type: none"> <li>Improved Data Quality: Ensure data accuracy through clear instructions, input limitations, and validation rules.</li> <li>Streamlined Submissions: Enable MAs/CPs to submit business plans, reports, and updates directly through a user-friendly web interface.</li> <li>Enhanced Efficiency: Reduce data processing time and improve overall strategic planning and budgeting effectiveness.</li> <li>Accessibility: Make the portal accessible to all MAs/CPs and IPPF Secretariat Staff with secure access controls for administrators.</li> <li>Secretariat Technical Review Teams (TRT) will have access to the portal, review business plans and produce a TRT report with observations and recommendations to improve the plans. TRTs will also be stored in the portal database</li> <li>Enable interoperability with the IPPF Partnership Dashboard to inform the BP/TRT module and display relevant data in dashboard reports, enabling the use of PowerBi analytic capabilities of the Partnership Dashboard</li> </ol> <p><u>The full list of functional requirements is annexed to this document.</u></p>
<b>3. Roles and responsibilities</b>	<p><u>Contractor's specific roles and responsibilities:</u></p> <ol style="list-style-type: none"> <li>Review the current business planning process and tools</li> <li>Review the current database</li> <li>Meet with key stakeholders</li> <li>Design a bespoke input portal for approval</li> <li>Develop input portal</li> <li>Ensure system accuracy and reliability through rigorous quality assurance processes and performance testing.</li> <li>Provide comprehensive training and support to staff, along with necessary documentation for knowledge transfer.</li> <li>Support post-implementation performance and fix bugs and problems, where they occur.</li> </ol> <p><u>IPPF's specific roles and responsibilities:</u></p> <ol style="list-style-type: none"> <li>Facilitating coordination among internal teams for effective collaboration with the consultant.</li> <li>Providing the consultant with necessary access to systems and tools</li> <li>Maintaining open and transparent communication channels with the consultant for regular updates and feedback.</li> <li>Ensuring that the project adheres to legal, regulatory, and ethical standards, especially concerning data usage and privacy.</li> <li>Providing timely feedback on the consultant's deliverables and participating in the evaluation of the project's progress.</li> <li>Assist staff in adapting to new systems</li> <li>Monitoring the performance and impact post-implementation.</li> </ol>
<b>4. Timeline</b>	<p><u>Commencement date.</u> Contractor services to commence 22 January 2024.</p> <p><u>Anticipated completion date.</u> Contractor services should be completed by 30 May 2024</p>
<b>5. Milestones and deliverables</b>	<p><u>Key milestone / deliverable dates:</u></p> <ul style="list-style-type: none"> <li>30 January 2024: inception report with design submitted for approval.</li> <li>30 April 2024: input portal designed and tested. Key staff trained in use.</li> </ul>

	<ul style="list-style-type: none"> <li>• 30 May 2024: signed off final delivery</li> </ul>								
<b>6. Contractor requirements</b>	<p><u>Professional Qualifications:</u></p> <ul style="list-style-type: none"> <li>• Certifications in Data Management: Such as DAMA, CDMP.</li> <li>• Degrees in Relevant Fields: including Computer Science, Data Science, IT.</li> <li>• Industry-Specific Compliance Knowledge: Understanding GDPR, HIPAA, etc.</li> </ul> <p><u>Experience Requirements:</u></p> <ul style="list-style-type: none"> <li>• Considerable experience with bespoke web-based data management platforms</li> <li>• Considerable experience with data modeling, database design, ETL processes.</li> <li>• Experience with Data Integration processes</li> <li>• Experience working with the development sector, preferably in federation or similar international organizations.</li> </ul> <p><u>Skills:</u></p> <ul style="list-style-type: none"> <li>• Advance knowledge of Excel</li> <li>• Advance knowledge of AWS, Azure, SQL, or the like</li> <li>• Advanced knowledge of BI Tools such as Tableau or Power BI.</li> <li>• Strong Analytical and Problem-Solving skills</li> <li>• Excellent Communication Skills</li> <li>• Ability to work with people from different countries, cultures, genders, and sexualities</li> </ul>								
<b>7. Submission of Proposal</b>	<p>The consultant(s) interested in submitting their proposals should do so in the following format.</p> <table border="1"> <thead> <tr> <th>Particulars</th><th>Details</th></tr> </thead> <tbody> <tr> <td>Consultant details</td><td>           Firm/agency should provide details of their:           <ul style="list-style-type: none"> <li>• Registered office address;</li> <li>• Service portfolio;</li> <li>• Pool of skill sets available.</li> </ul> </td></tr> <tr> <td>Consultant experience</td><td>           Provide the details of relevant experience that best illustrate ability to provide services required as per the scope of work (above).             (Highlight at least 3-4 examples of similar work undertaken in the past three years)         </td></tr> <tr> <td>Approach &amp; Methodology</td><td>           Provide overall approach &amp; methodology to cover the details provided in the scope of work above, which include:           <ul style="list-style-type: none"> <li>• Understanding of the requirements of IPPF;</li> <li>• Overall approach and its responsiveness to the objective;</li> <li>• Methodology to be adopted to undertake the scope of work;</li> <li>• Key risks and mitigation strategies to be put in place.</li> </ul> </td></tr> </tbody> </table>	Particulars	Details	Consultant details	Firm/agency should provide details of their: <ul style="list-style-type: none"> <li>• Registered office address;</li> <li>• Service portfolio;</li> <li>• Pool of skill sets available.</li> </ul>	Consultant experience	Provide the details of relevant experience that best illustrate ability to provide services required as per the scope of work (above).  (Highlight at least 3-4 examples of similar work undertaken in the past three years)	Approach & Methodology	Provide overall approach & methodology to cover the details provided in the scope of work above, which include: <ul style="list-style-type: none"> <li>• Understanding of the requirements of IPPF;</li> <li>• Overall approach and its responsiveness to the objective;</li> <li>• Methodology to be adopted to undertake the scope of work;</li> <li>• Key risks and mitigation strategies to be put in place.</li> </ul>
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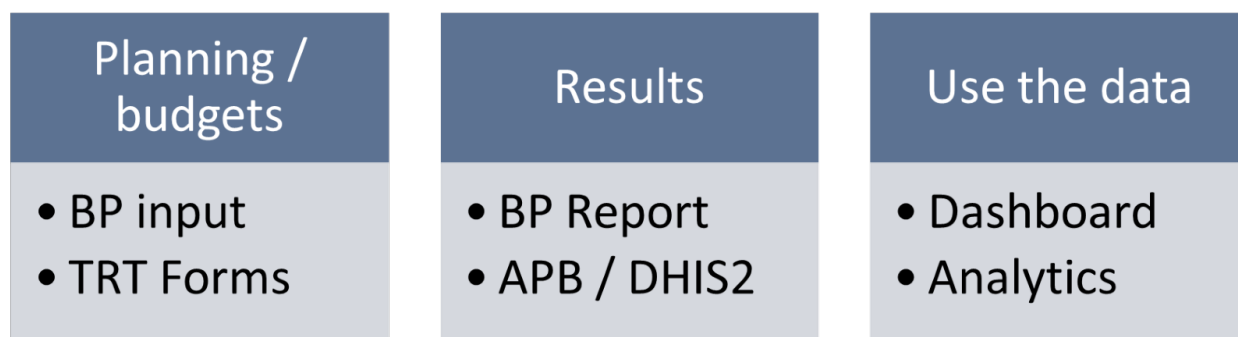
	Team member(s)	Provide brief bios and detailed CVs of list of personnel to work exclusively on the IPPF project.		
	Financial Quote			
	The financial quote should be provided in the table below. The budget cannot exceed USD 30,000.			
	Particulars	Amount (£) Excluding CAT	VAT as per the current rate applicable	Total Fee (£)
		(A)	(B)	(C) = (A) + (B)
	Gross Annual Fee		VAT (...%)	
			VAT (... Amount)	
Expenses, if any, will be reimbursed to the selected firm only in case they need to travel outside of the country, based on actual costs subject to the overall limits provided within the IPPF travel policy				

## Annex 1. System Requirements Document

This System Requirement Document outlines the essential features and functionalities of the IPPF Member Association Business Planning and Reporting Portal. Implementing this system will significantly improve data quality, streamline data collection, and enhance the overall effectiveness of IPPF's strategic planning and budgeting operations.

Note: This SRD is a preliminary template and can be further customized based on specific needs and priorities. It is crucial to involve stakeholders from both the IPPF Secretariat and MAs/CPs throughout the development process to ensure the system meets all requirements and expectations.

### 1.1 System Components



- **Planning and Budget Module**
  - Business Plan Forms

- Business Plan
  - Half-Year Report
  - Annual Report
- Technical Review Team Forms
  - Observations and recommendations
- **Results Module**
  - Business Plan Report
  - Annual Program Budget
  - DHIS2 Service Statistics Platform data
- **Use of Data Module**
  - IPPF Partnership Dashboard KPIs
  - IPPF Business processes databases available for analysis
  - Use of business intelligence reporting capabilities

### **3.2 User Roles and Access Control:**

- MA/CP Users:
  - View and submit business plans, reports, and updates.
  - Download submitted data and reports for their records.
  - Download TRT reports to improve and update their business plans.
  - Track submission status.
- TRT Secretariat Users:
  - View and analyse business plans.
  - Document observations and recommendations in the TRT format.
- Administrator Users:
  - Manage user accounts and access levels.
  - Configure portal settings and templates.
  - Review and validate submitted data.
  - Generate reports and dashboards.

### **3.3 Data Management:**

- Business Plan and TRT:
  - Support for data entry in online BP and TRT templates.
  - Data validation and formatting rules.

- Version control and audit trail for changes.
- Reporting:
  - Standardized forms for half-yearly and annual reports.
  - Data validation and consistency checks.
  - Integration with existing reporting tools.
- Updated Plans/Budgets:
  - Ability to update plans and budgets for the following year.
  - Comparison tools with previous plans for easy reference.

### **3.4 User Interface and Usability:**

- Intuitive and user-friendly interface for MAs.
- Clear navigation and instructions for data input.
- Multilingual support (if applicable).
- Responsive design for various devices.
- Accessibility features for users with disabilities.

### **3.5 Security and Data Protection:**

- Secure login and access control mechanisms.
- Data encryption at rest and in transit.
- Regular backups and disaster recovery plan.
- Compliance with relevant data privacy regulations.

## **4. Technical Requirements**

- Web-based application accessible through standard web browsers.
- Integration with existing IPPF Partnership Dashboard data warehouse and reporting tools.
- Support for common file formats (Excel, CSV, PDF).
- Scalability to accommodate future growth in data volume and users.

## **5. Implementation and Deployment**

- Phased implementation to minimize disruption.
- Comprehensive user training and support materials.
- Testing and quality assurance procedures.
- Post-deployment maintenance and support plan.

## **6. Evaluation and Success Criteria**

- Increased data accuracy and quality.
- Reduced data processing time and costs.



- Improved user satisfaction and adoption rate.
- Enhanced efficiency of strategic planning and budgeting processes.

#### **7. Integration Considerations**

- Integration with the IPPF Partnership Dashboard platform.
- Advanced reporting and data analysis capabilities.
- Mobile application development for on-the-go access.