



INTERNATIONAL PLANNED PARENTHOOD FEDERATION

TERMS OF REFERENCE

FOR

**DESIGN, DEVELOPMENT, IMPLEMENTATION AND MAINTENANCE
OF PHASE-3 IPPF DASHBOARD**

June 2026

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Acronyms

Acronym	Description / Expansion
IPPF	International Planned Parenthood Federation
MA	Member Association
CP	Collaborative Partner
RBAC	Role-Based Access Control
ETL	Extract, Transform, Load
EDW	Enterprise Data Warehouse
SQL	Structured Query Language
API	Application Programming Interface
CYP	Couple Years of Protection
UX	User Experience
KPI	Key Performance Indicator
POC	Proof of Concept
GDPR	General Data Protection Regulation
SOP	Standard Operating Procedure
PLI	Performance, Learning & Impact
GIS	Geographic Information System
UAT	User Acceptance Testing
ADF	Azure Data Factory

1. Background and Objective

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 129 countries, with an active presence in further 13 countries, totalling about 150 countries.

IPPF's work is wide-ranging, including comprehensive sexuality education, provision of contraceptives, safe abortion, maternal care, and responding to humanitarian crises.

IPPF's mission is to lead a locally owned, globally connected civil society movement that provides and enables services and champions sexual and reproductive health and rights for all, especially the under-served.

Over the years, IPPF has implemented multiple operational and reporting systems to support programme delivery, financial management, accreditation, and performance monitoring. As a result, critical data required for decision-making is distributed across several platforms, including business planning systems, service delivery platforms (e.g., DHIS2), financial systems (e.g., NetSuite), accreditation systems, and Excel-based processes. While these systems individually serve operational needs, they create challenges in achieving a consolidated, timely, and analytically consistent view of organisational performance. Key challenges that IPPF faced included fragmentation of data across multiple source systems, dependence on manual consolidation and validation for reporting, limited ability to perform disaggregated analysis (including for humanitarian programmes and geographical service delivery reach), inconsistent accessibility of insights for decision-makers and programme teams, and a growing need for self-service analytics with reduced dependency on external vendors.

To address these challenges and to strengthen organisational information systems, IPPF has developed and implemented an interactive cloud-based platform (the IPPF Dashboard/ also referred to as dashboard in this document) to consolidate and present quantitative data collected from Member Associations and collaborative partners across the Secretariat.

2. Purpose

The overall purpose of the dashboard is to facilitate data/ evidence-based support from the secretariat to the Member Associations (MAs) and Collaborative Partners (CPs) by ensuring

- data collected through secretariat wide applications/ processes is consolidated, triangulated and analysed in relation to results achieved,
- evidence-based support/ oversight and
- evidence based organisational decision-making

3. Planned Phases

In line with the above objectives, the IPPF has planned the roll out of the dashboard in the following phases, Phase-1 and 2 completed, this TOR focuses on Phase-3 and we have in parallel launched phase 4, as detailed below:

Phase 1 - In this phase, the following actions were taken:

- Membership mapping and streamlining. IPPF established an Affiliate Register to create a triangulated partner database across key systems, including the membership register, business plans, strategic alignment data, and DHIS2.
- Annual Business Plans data integration (maintained in Excel at the time)
- Annual service delivery data and global indicators integrated from global DHIS2 platform.
- Accreditation data maintained in PRISM integrated.

Phase 2 - In this phase, the following actions were taken:

- Detailed user feedback and deep dive conducted with key Secretariat users to ensure that dashboard analysis and reporting were user-centric and aligned with operational needs.
- Additional data added to the dashboard included
 - grants released by IPPF, captured through the NetSuite system.
 - annual income generated by Member Associations, as reported through the MA Income Breakup Template and
 - commodities supplied to Member Associations via the UN, in addition to those provided through IPPF.

Phase 3 - This phase now focuses on integrating additional datasets and strengthening analytical capabilities, including:

- Business plan, half-yearly, and annual financial data directly from the Business Plan Portal
- Annual CMIS survey data maintained in Excel to enable global mapping of service delivery points
- Disaggregated humanitarian programme data maintained on DHIS2 and
- Where feasible, develop a dedicated section on youth engagement using available datasets.
- introduce an interactive chatbot capability to respond to standard queries and retrieve data from the data warehouse through plain-English user inputs, as well as AI-based summary features on each dashboard.
- finally, further feedback to ensure the dashboard consistently addresses key performance questions and remains aligned with evolving priorities.

Phase 4 - In the final phase (which is now going to be run in parallel to the phase 3), IPPF will undertake a detailed needs assessment to deliver a user-centric, multilingual, and highly integrated dashboard for the MA/ CPs/ Project partners. This phase will ensure the dashboard better serves the needs of Member Associations, Collaborative Partners, and project partners—beyond Secretariat users. Continuous engagement and feedback will be incorporated throughout to ensure the dashboard remains aligned with evolving priorities and user requirements.

4. Current System Design

During the previous phases, a detailed assessment of source systems and data availability was conducted to support the development of the IPPF dashboard. The objective of this exercise was to understand data structures, data quality, availability, and integration requirements across systems to design a consolidated, accurate, and reliable reporting solution. Accordingly various source systems were covered as mentioned in subsequent paragraphs.

4.1. Source Systems

The following data sources have already been incorporated into the dashboard framework:

- Needs & Resource Allocation data (Excel-based)
- Actual Grants to MAs/CPs (NetSuite ERP)
- UNFPA Commodities data (Excel-based)
- MA Income (Excel-based)
- MA Business Plan (Excel-based)
- Mapping Register (Excel-based)
- Service Delivery Statistics and Global Indicators - Services, clients, advocacy wins, sexual education programme and commodities distributed data (Global DHIS2)
- Prism - Accreditation System (.net bespoke solution)

4.2. Functional and Technical Structure

The functional and technical structure of the dashboard is explained under the following broad components:

- Solution Architecture
- Data Exchange Approach
- IPPF Dashboard Phase-2 Data Flow
- Data Sources (SharePoint)
- Enterprise Data Warehouse
- ETL Design
- Power BI Data Model

4.2.1. Solution Architecture

The current solution architecture is built on a centralized, cloud-based data infrastructure designed to enable secure data integration, processing, and visualization, thereby supporting IPPF's reporting and analytics requirements, as depicted in Annexure 2.

4.2.2. Data Exchange Approach

Up to Phase 2, the IPPF Dashboard data integration framework has been implemented using file-based ingestion mechanisms (primarily Excel) through SharePoint and portal-based data sources. Data pipelines are orchestrated to support historical loading, full refresh, and snapshot-based incremental strategies depending on the source system characteristics.

Source	Source Mechanism	Storage / Ingestion Layer	Historical Coverage	Load Strategy	Data Refresh Frequency
Needs	Excel	SharePoint	<ul style="list-style-type: none"> • Needs (2022); Funding Allocation (2023-2025); • Needs 2025 - Funding Allocation (2026-2028) 	Full replacement load (existing warehouse records overwritten with latest dataset)	Half-Yearly
MA Business Plan	Excel (2022-2024); BP Portal (2025 onwards)	SharePoint (legacy); BP Portal (current)	<ul style="list-style-type: none"> • 2022-2024 loaded; • 2025 onwards via portal 	Year-based full refresh (delete and reload entire year's data)	Annual

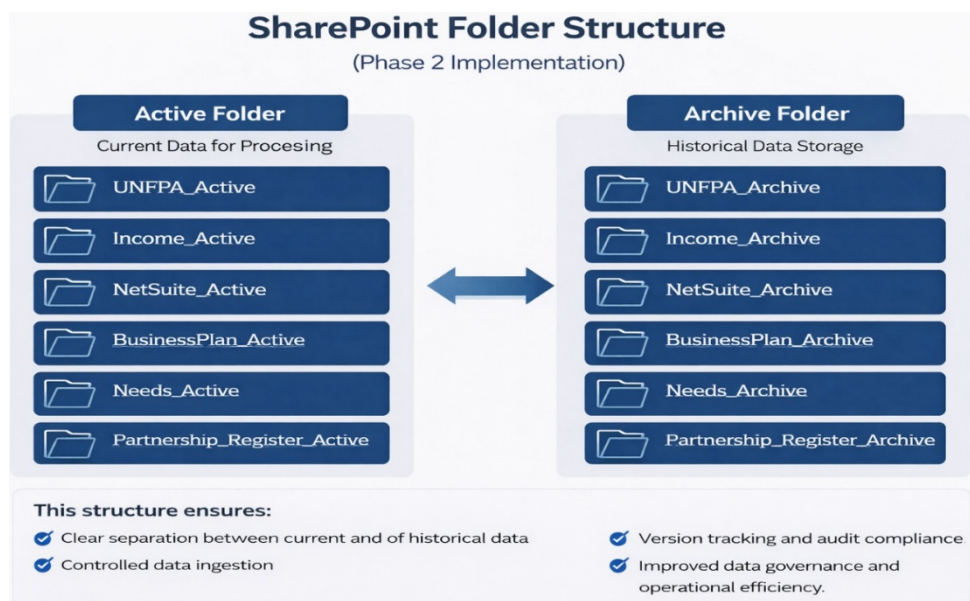
Source	Source Mechanism	Storage / Ingestion Layer	Historical Coverage	Load Strategy	Data Refresh Frequency
NetSuite (Grants Data)	Excel Extracts	NetSuite Saved Search (extract)/ SharePoint (store)	<ul style="list-style-type: none"> 2020 onwards 	Monthly partition-based full refresh (delete and reload monthly data)	Quarterly
UNFPA	Excel	SharePoint	<ul style="list-style-type: none"> 2023 data received to date 	Full replacement load (overwrite existing data for the period)	Annual
MA Income	Excel (2016-2023); BP Portal (2024 onwards)	SharePoint / Portal	<ul style="list-style-type: none"> 2016-2023 historical; 2024 onwards via portal 	Historical load completed; future to align with portal ingestion	Annual
Mapping Register	Excel	SharePoint	<ul style="list-style-type: none"> From 2023 onwards 	Snapshot-based incremental load (insert new records with DateTime stamp for versioning)	Monthly

4.2.3. IPPF Dashboard Data Flow

All data sources incorporated in Phase 2 follow a structured and standardized data flow architecture. The design aligns with established best practices in data warehousing and business intelligence to ensure data integrity, scalability, and efficient reporting, as presented in annexure 3.

4.2.4. SharePoint (Data Source)

Up to Phase 2, sharepoint has been identified and implemented as the primary data source repository. The required folder structure has already been created, and the location has been shared with the respective source system owners. Updated data is regularly uploaded and maintained in the designated active folder for further processing, as provided below.



After the file is processed as part of the regular data refresh frequency, the data is copied to the archive folder. Most of the process are automated using scripts/apps, except **Mapping Register**. 'Mapping Register' is a file that is being updated manually on an active location. So, this file is not moved to the archive by the scripts.

Landing: Blob Storage acts as the landing zone for loading data coming in the form of files from SharePoint. This is the unstructured data which is copied from SharePoint as-is and brought into the Azure environment.

Staging: The staging area allows for loading raw data in RDBMS and becomes the source for all the subsequent data load. Minimal data transformation happens at this stage. **The objective is to maintain the data in its raw format with rectified data points and other additional details such as file name etc.**

4.2.5. Enterprise Data Warehouse

The Enterprise Data Warehouse (EDW) serves as the central and consolidated data repository, maintaining both current and historical datasets. It acts as the single source of truth for reporting and analytics. The following design principles are implemented in the ETL processes at the EDW layer:

- Historical Data Retention: Data history is consistently maintained to support trend analysis, audit requirements, and longitudinal reporting.
- Incremental Data Loading: Incremental load mechanisms are designed to identify unique business keys for each record. During processing, records are validated against existing warehouse data to determine whether they should be inserted, updated, or retained.
- KPI Computation at Warehouse Layer: The majority of Key Performance Indicators (KPIs) are calculated within the EDW layer. Dedicated ETL workflows are developed to transform source data and compute KPI metrics in a structured and optimized manner.

ETL design: The ETL Design highlights the Azure Data Factory (ADF) pipelines and Snowflake transformation logic implemented as part of 2 Phases. It defines the source-to-target mappings, staging layer processing, data validation rules, incremental load strategies (including full refresh, partition-based refresh, and snapshot loads), and historical data retention mechanisms. The section also details the KPI transformation logic, error handling procedures, logging mechanisms, and performance optimization practices currently in use within the Enterprise Data Warehouse.

Power BI Data Model: The Power BI Data Model defines the logical relationships between the tables imported from the Enterprise Data Warehouse and is currently operational as part of Phase 2. The model has been structured to ensure accurate reporting, optimized performance, and consistent KPI calculations across dashboards. The following design principles have been applied:

- Relationships between fact and dimension tables have been analysed and appropriate join logic (e.g., one-to-many, many-to-one) has been configured.
- KPI aggregation and roll-up logic has been defined to support hierarchical reporting (e.g., MA, regional, global levels).
- Bridge or intermediate tables have been introduced where required to resolve complex or many-to-many relationships.
- Validation scripts and test queries have been executed to confirm the correctness of joins, aggregations, and calculated measures.

The current data model supports the dashboards delivered and ensures consistent, accurate, and scalable reporting for users.

ETL Design and Power BI Data model Sections refer to mapping of source to target fields. Details may be shared as part of discovery post vendor selection.

5. Scope of Work

This section provides the detailed scope of work for Phase 3 of the IPPF Dashboard initiative. Building on Phases 1 and 2, which established a centralized Azure-based data architecture comprising structured data ingestion pipelines, a Snowflake Enterprise Data Warehouse (EDW), and a Power BI reporting layer, Phase 3 will strengthen integration maturity, automate data workflows, optimize the data model and system performance, reinforce data governance controls, and expand analytical capabilities.

Phase 3 will also extend the coverage and practical utilisation of the dashboard, positioning it as a comprehensive analytical platform that supports evidence-based reporting and informed, data-driven decision-making. In addition, the phase will introduce advanced integration mechanisms and AI-enabled user interaction features to address evolving reporting requirements and enhance overall decision intelligence.

5.1. Key focus areas

5.1.1. Data sources for Phase 3:

- **Business Plan Portal:** platform that is used for collecting data relating to Member Associations' Business Plan, HYR (half year) and Annual Report. This portal is built on DHIS2 platform. Integration of Business Plan portal to IPPF Dashboard (Phase 3) aims to improve IPPF's ability to service its MAs/ CPs ensuring ease of access, speed of analysis and comparison of existing Business Plan data relating to the plans and budgets to actuals using data from Half yearly and annual reports. This will also help in analysing trends and forecast forward looking projections.
- **CMIS survey data:** Clinic Management Information System (CMIS) includes data from OpenEMR, local developments and commercial clinic systems. The IPPF Dashboard will process CMIS survey data ingestion primarily from Excel-based tables compiled through DHIS2. The CMIS annual survey collects data on location of clinics through the DHIS2 Global Indicator section. The data from this section is downloaded on Excel format. These completed forms are uploaded in folders grouped by year in the Impact and Evidence Share Point section, from where data will need to be updated on the IPPF Dashboard.

CMIS > CMIS audit > CMIS Audit 2017 to 2021 > 2017

Name	Modified
1 All Clinics - No CMIS.xlsx	4 May, 2022
2 All Clinics - Fully Manual.xlsx	4 May, 2022
3 All Clinics - Partly Manual AND Partly Ele...	4 May, 2022
4 All Clinics - Fully Electronic.xlsx	4 May, 2022
5 All Clinics - Unknown.xlsx	4 May, 2022

- **Humanitarian programme data:** The humanitarian team uploads on to DHIS2 based standard data elements, indicators, and reporting structures. This data primarily relates to projects. As part of this phase, the idea is to integrate with humanitarian data section on DHIS2. However the selected vendor may still need to design the integration mechanism in a way to allow inclusion of humanitarian programme data on excel sheets. Key Data Elements on DHIS 2 include:

- Service Delivery Data: Total number of humanitarian clients, breakdown by - country and channel, such as Static Clinics, Associated Clinic, Community-Based Distribution (CBD), Mobile/Outreach, Digital Platforms, etc. Demographics information (including young people, female clients, marginalised communities), Client status/profile (including Internally Displaced Person, Refugee, Host Community, Returnee, Migrant, Person living with disabilities, Person with diverse SOGIESC, Indigenous person, Pregnant and Lactating Person, Person living with HIV, etc.)
 - Number and types of Services Provided: specifically refers to the kinds and number of each kind of service provided in humanitarian settings. This includes total number of clients reached with clinical services (numbers broken down into Sexual and Reproductive Health (SRH) and non-SRH services) e.g. Contraceptive Services, Comprehensive Abortion Care (CAC), STI and HIV Services. Maternal and Newborn Health, Maternal and Perinatal Death and SGBV Services, Non-SRH services etc.
 - Health Information and Awareness Sessions: This captures the number of clients reached through these sessions, with figures for male, female, non-binary, and total individuals.
- **Unique identification number: - The main objective of Unique Identification Number (UIN) system is to implement a Unique Identification Number (UIN) code structure to streamline IPPF's data management systems eliminating the requirements to map affiliate/ partner data from each system (e.g. DHIS2, PRISM, NetSuite etc.). The idea is to replace the current Mapping Register (excel) being used to map affiliates/ partners across multiple systems to present cohesive data on IPPF Dashboard.**
 - **AI & Chatbot - introduce secure, AI-powered capabilities, including an interactive chatbot that enables natural-language queries to retrieve data directly from the data warehouse, along with AI-generated summary features on each dashboard. Key features of this solution are provided in Annexure - 1.**

The Phase 3 will focus on:

- expanding data integration to incorporate additional structured and semi-structured datasets.
- strengthen the existing EDW to improve scalability, performance, governance, and analytics.
- enhanced user experience (UX) and data literacy to improve usability, adoption, and effective interpretation of dashboard insights.
- enhanced analytical depth, KPI granularity, and cross-domain reporting capabilities.
- enhance dashboard architecture to improve performance, scalability, and responsiveness across the federation.
- strengthen automation, performance optimization, and governance controls.
- replace (wherever possible) manual excel-based ingestion with automated API-based or secure data extraction mechanisms and implement robust validation controls to ensure data consistency, accuracy, and integrity across financial and operational reporting.
- aligning all enhancements with IPPF's performance framework, safeguarding standards, youth and humanitarian priorities, and strategic objectives.
- enforce role-based access control (RBAC), maintain full auditability and data lineage, support data version control and cutover logic, align with IPPF data protection standards, and comply with applicable GDPR and internal data governance policies.

- incorporate easy to monitor usage analytics capabilities to monitor dashboard adoption and engagement across Secretariat teams.
- continuous feedback will be incorporated to ensure the dashboard remains responsive to key performance questions and aligned with evolving priorities.
- knowledge transfer/ support: As part of the engagement, the selected vendor, if required, shall undertake structured Knowledge Transfer (KT) and provide support for the IPPF dashboard through the process of transition. This includes support processes/ data/ dashboards already setup in any of the phases. The scope shall include:
 - Comprehensive understanding of the solution architecture.
 - Detailed walkthrough of ETL processes, KPI computation methodologies, data model relationships, refresh mechanisms, and security configurations.
 - Review and validation of system access, repositories, deployment processes, and governance controls.
 - Operational support to ensure stability of data refresh cycles, dashboard functionality, and system performance.
 - defect resolution, data load issues, and operational incidents management.
 - regular status reports ensuring continuity and institutional knowledge retention.

This workstream shall ensure seamless transition (as required) and ongoing support, ensure no operational disruption, and strengthen IPPF's internal capability to manage and sustain the dashboard ecosystem.

5.2. Data Analysis and Reporting

Some of the key analysis and reports that will be added in this phase, include but are not limited to:

- Budget vs Actual Expenditure Monitoring by pillar/ themes
- Multi-Year Financial Trend Analysis
- Strategic Pillar and Focus Area Alignment Dashboard. This would include activity distribution across pillars and themes and alignment gaps or concentration risks.
- Funding Allocation and Resource Efficiency Dashboard: analytics to assess financial efficiency and funding effectiveness, including:
 - Grant allocation vs. utilization tracking
 - Cost-per-service and cost-per-beneficiary metrics (where data is available)
 - Burn-rate and budget absorption analysis
 - Cross-MA efficiency comparison
 - Trend analysis across financial cycles

The dashboard shall support resource optimization, donor reporting, and strategic funding decisions.

- Thematic Investment (like Youth programmes, Humanitarian response, Safeguarding, Gender equality, Advocacy work, etc).
- Multi-Year Planning and Trend Analysis: enable longitudinal analysis across multiple years, including:
 - Multi-year target growth trends
 - Budget growth vs. service output growth analysis
 - Thematic focus shifts across planning cycles
 - emerging priority identification

This shall support long-term strategic planning and federation-level performance forecasting.

- Youth Engagement Analytics to track and report youth-related programme performance across Member Associations. This will include key information such as the percentage of services provided to young people (10-

24 years), total youth beneficiaries reached, youth participation in activities, youth-led initiatives, and youth representation in leadership. It will also compare youth and adult service usage and track trends over time.

- Humanitarian services delivered by age, gender, location, and vulnerability, and enable comparison and trend tracking across emergency settings. The dashboard shall display key indicators such as
 - total SRH services delivered,
 - beneficiaries reached,
 - coverage of affected populations,
 - CYP achieved,
 - adolescent and refugee reach,
 - humanitarian vs core programme ratio,
 - operational facilities,
 - stock-out rates, and
 - year-on-year performance trends.

Each dashboard shall include defined KPIs, drill-down capability (Global - Region - MA), variance analysis, and visual performance indicators.

- On a world map, present location of the MA head office, map is clinics/ service delivery points - services delivered or clients reached (wherever data is available).

5.3. Stakeholder Engagement, ETL Streamlining, and Knowledge Transfer

Throughout Phase-3, structured stakeholder engagement with Secretariat teams, shall be conducted through workshops, UAT sessions, and iterative feedback cycles to ensure alignment with operational needs, enhanced usability, performance transparency, and responsiveness to evolving priorities.

In parallel, the phase will focus on streamlining and semi-automating ETL processes to improve data stability, reduce manual intervention, and minimise future change requests arising from structural or integration gaps. Knowledge Transfer (KT) will be undertaken as part of the implementation to enable IPPF teams to independently manage, operate, and sustain the dashboard ecosystem post-deployment

5.4. Architectural Modernization/ Simplification

The vendor shall evaluate and as part of their proposal provide an optimum solution along with reasons, to support progressive modernization of the analytics ecosystem toward a unified and scalable platform. The solution shall reduce multi-tool complexity by consolidating data ingestion, storage, transformation, warehousing, BI, and AI capabilities within an integrated architecture. It shall enable embedded AI functionalities, centralized governance controls, and streamlined platform management, while ensuring predictable capacity-based billing and scalable compute infrastructure to support federation-wide growth.

6. Deliverables

The vendor shall be required to deliver:

- **Inception Report:** A detailed plan providing the Phase-3 IPPF Dashboard implementation.
- **System Design Specification Report for Phase-3 IPPF Dashboard:** The System Design & Specification Report for Phase 3 to serve as the comprehensive technical blueprint for the IPPF Dashboard enhancements. It will outline the proposed solution architecture, data integration framework, EDW design, dashboard functionality, AI-enabled capabilities, security controls, performance optimization approach, and implementation methodology. The report will clearly define technical specifications, integration mechanisms, KPI logic,

governance controls, and deployment strategy, providing IPPF with a structured and approved design foundation prior to development and implementation.

- **Completion of System Development:** Phase 3 system development shall be considered complete upon successful implementation and validation of all agreed functional and technical requirements, in line with the approved design.
- **UAT Report:** The UAT Report shall document the validation and user acceptance of all Phase 3 functionalities against the approved scope and system design. It shall cover testing outcomes, data accuracy verification, KPI validation, security and role-based access checks, performance testing results, and confirmation of AI-enabled features (where applicable). The report shall include issue logs, resolution status, and formal user sign-off prior to production stabilization.
- **User Training, SOP, User Manual & updated technical design document Submission with Go-Live Sign-Off:**

This deliverable shall include the conduct of structured user training sessions for relevant stakeholders, covering dashboard navigation, KPI interpretation, drill-down capabilities, AI-enabled features (where applicable), and reporting workflows. The vendor shall

 - Develop the above trainings into online tools in collaboration with the moodles team at IPPF so that these trainings become available as a standard feature.
 - submit comprehensive Standard Operating Procedures (SOPs) and User Manuals detailing system usage, data interpretation guidance, and support processes.

This shall conclude with formal Go-Live confirmation and user sign-off, certifying readiness for operational use.

7. Desired Qualifications

The ideal firm should possess:

- Proven experience in designing and implementing dashboards of comparable complexity, scale, and scope.
- Experience with large, decentralized organizations, preferably in the non-profit or international development sector.
- Expertise in database management, data integration, and system automation.
- Familiarity with data privacy and security regulations (e.g. GDPR).
- Strong analytical and problem-solving skills.

8. Duration of the Assignment

The engagement shall span a total duration of 12 months + from the date of contract signing. This duration shall include the following:

- Implementation & Integrated Go-Live Period:
 - Existing System – Knowledge Transfer & Transitional Support:
 - Month 1: Structured Knowledge Transfer (KT) of the existing Phase 1 and Phase 2 solution. During this period, the existing vendor shall continue operational support with required support/ facilitation from IPPF.
 - Phase 3 – Design, Development & Integration:
 - Month 1: Initiation of Phase 3 system study and solution design.
 - Months 2-5: Design, development, integration, and testing of Phase 3 enhancements.
 - Month 6: Integrated go-live of the complete enhanced solution (Existing + Phase 3).

- Implementation Support for Integrated Solution:
 - Initial Period: Transitional support and maintenance of the live system to ensure uninterrupted operations until full integrated go-live.
 - Post Go-Live: Structured post-implementation support post go-live of phase 3.
- Any extension beyond this period will be subject to mutual written agreement between IPPF and the selected bidder, including agreement on scope, duration, and commercial terms
- The vendor shall work closely with IPPF's PLI and IT teams throughout the engagement to ensure effective coordination and seamless implementation.

9. Application Process

Interested firms should submit the following:

- Profile of the firm/ including key resources to be deployed on the assignment.
- Technical Proposal detailing their approach including methodologies and timelines.
- Financial Quote specifying the fee and any other anticipated costs.
- Relevant references and a portfolio of at least 2-3 similar past projects, if available.

10. Timelines

- Initial Queries should be submitted by **June 21st, 2026** 17:00 UK time
- Clarification to Queries to be provided by **June 23rd, 2026** 17:00 UK time
- Applications should be submitted by **June 30th, 2026** 17:00 UK time
- Review of all proposals will be completed by **July 10th, 2026**
- Intimation for presentation to final shortlisted vendor by **July 17th, 2026**
- Selection and onboarding of vendor **31st July 2026**.

11. Payment terms

The payment terms applicable to the selected 'Consultant' will be linked to specific deliverables, as per the following terms.

S. No.	Milestone	Payment Terms
A	Integrated Go-Live (Fc)	
1	Signing of Contract and Submission & Approval of Inception Report	15% on consultant fee – Go Live phase (Fc)
3	Submission and Approval of System Design & Specifications Report	20% on consultant fee – Go Live phase (Fc)
4	Completion of System Development as per Phase-3 Scope	20% on consultant fee – Go Live phase (Fc)
5	Successful Completion of UAT	15% on consultant fee – Go Live phase (Fc)

S. No.	Milestone	Payment Terms
6	Conduct of User Training, Submission of SOP & User Manual, and Integrated Go-Live (Phase 1 + Phase 2 + Phase 3)	30% on consultant fee – Go Live phase (a)
B	Post-Implementation Support for Integrated Solution (Fm)	
1	Transitional Support Services for existing IPPF Dashboard until Phase 3 GoLive	Payable in equal monthly instalments, subject to submission and acceptance of Monthly Progress Reports, in line with the agreed support terms and conditions.
2	Post Go-Live Support Services	Payable in equal monthly instalments for 12 months, subject to submission and acceptance of Monthly Progress Reports, in line with the agreed support terms and conditions

Note:

- **Fc** refers respective Model-wise Integrated Go-Live Fee quoted by the vendor.
- **Fm** refers to the Post implementation Support Fee quoted by the vendor.
- The financial quote as per desired format of the TOR needs to be provided in **USD only**.
- The invoices towards the services rendered by the consultant shall be submitted to IPPF.
- All payments shall be made on submission of invoices towards services/products delivered.
- IPPF shall release the payments after checking the invoices as per agreement, subject to satisfactory performance by the 'Vendor' and adherence to conditions of the TOR and agreement signed thereof.
- The payment terms and milestones for tasks/activities related to 'System Augmentation Support' shall be mutually decided and agreed upon, as part of the change request procedure. All such agreed changes shall be incorporated as an amendment to the agreement /contract and shall be signed by both the Parties (i.e. IPPF & the selected 'Vendor').

12. 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.

13. 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"> • Bidding legal entity. • Geographical presence and experience of the firm • Service portfolio.

#	Particulars	Details to be provided
		<ul style="list-style-type: none"> Pool of skill sets available with the firm.
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	<p>The bidder shall provide details of relevant experience, including citations of similar assignments undertaken, demonstrating their capability to deliver the services outlined in the TOR. A minimum of two (2) citations of comparable client projects, along with references, must be submitted.</p> <p>The bidder shall confirm that, if shortlisted, they will provide contact details of the two referenced clients for verification purposes. The bidder should also demonstrate a strong understanding of the Client's business context and requirements.</p>
4.	Approach & Methodology proposed for the project	<p>Bidder should provide overall approach & methodology to cover minimum details in terms of following:</p> <ul style="list-style-type: none"> Understanding of the project and its objectives. Overall approach and its responsiveness to the objective of the assignment. Methodology to be adopted. Project Plan.
5.	Proposed Solution – Requirement-wise Response	<p>The Bidder shall submit a structured, requirement-wise response clearly explaining how the proposed solution addresses the key technical, architectural, AI, governance, performance, and integration requirements outlined in the relevant sections of this TOR.</p> <p>The response must explicitly indicate conformity with each requirement and clearly disclose any deviations, assumptions, or exclusions.</p>
6.	The Bidder's Project Manager should have at least 5 years of experience in development and implementation of similar dashboard solutions.	Summary of experience in development and implementation of similar dashboard projects undertaken in the last 5 years
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>

Note: Proposals should not be more than 20 pages.

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 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.

Key considerations for the Technical bid

- Successful demonstration of Proof of Concept as a prequalification criteria.

14. Financial Bid Format

The Financial Proposal shall be submitted in USD by the interested bidders, strictly in accordance with the format prescribed below.

The Bidder shall submit a modular and option-based financial proposal aligned with the architecture alternatives defined in the Scope of Work (SOW). IPPF reserves the right to evaluate the technical suitability, scalability, governance implications, total cost of ownership, and commercial impact of each model / option prior to determining and awarding the final architecture model.

The Bidder shall provide a complete commercial quotation strictly in accordance with the financial format provided below, covering all three proposed models. The costs for Integrated Go-Live may vary depending on the model proposed and shall therefore be quoted separately for each model.

The cost for System Augmentation shall be submitted as one consolidated rate structure, covering all resource categories that may be required for executing any of the proposed models. Depending on the architecture model selected by IPPF, the relevant resources shall be activated and governed through the change request mechanism.

Table 1: Model wise Fee for Integrated Go-Live (Fc)

S.No.	Particulars	Total Amount (US\$) Excl. VAT
1	Go - Live Fee (excluding AI & Chatbot) (Fc)	
2	AI & Chatbot (Fc)	
Total (Fc)		

Table 2: Post-Implementation Support for Integrated Solution (Fm)



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					
n					
Total cost for Post Implementation Support exclusive of VAT (Fm)					

Table 3: System Augmentation Cost for all models (resource fee/ per day)

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

Key considerations on the financial format above

- Only those Bidders who qualify the technical evaluation shall be shortlisted for financial evaluation.
- Providing Price bid other than this format or incomplete price bid may lead to rejection of the bid.
- The contract shall be awarded to the bidder whose proposal offers the best overall value to IPPF, based on a comprehensive evaluation of both technical and financial criteria.
- Final financial quote need to be in US\$.
- The above bid is only for the vendor’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: _____

15. 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.

16. Clarification of Request for proposal

A prospective bidder requiring any clarification on the TOR may notify IPPF by e-mail. They shall submit any queries related to the TOR document in the following format in excel or word format only to mddt@ippf.org by **21st June 2026**. 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) for ready reference of all prospective bidders.

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

17. How to apply

Proposals must be sent via email to the email address: mddt@ippf.org. The Bids (Technical and Financial) must be received by IPPF in the requisite format as mentioned above no later than **5 PM BST on 30th June 2026**.

Annexure 1 – AI-Enabled Conversational & Narrative Analytics

Design, develop, and deploy an AI-enabled conversational analytics layer integrated with the Enterprise Data Warehouse (EDW) and Power BI/Fabric environment. The solution shall enable secure, natural-language interaction with programme, financial, performance, and strategic data. The core capabilities of this chatbot besides other things will include:

A. MINIMUM REQUIRED FUNCTIONALITY

- Technical Architecture Requirements : The solution should:
 - Use advanced AI models (Large Language Models) that can safely retrieve and use data from the official data warehouse before generating responses.
 - AI based Conversational Analytics – Microsoft Copilot (preferred) or similar (“Ask IPPF”) – Chatbot
 - Natural language query interface for business users. Convert user questions in plain English into secure data queries automatically. Ensure that answers are based only on approved IPPF data and not on external or unrelated information.
 - Context-aware translation of user queries into structured data retrieval (e.g., SQL). Connect securely with the Enterprise Data Warehouse (EDW) through authorized and controlled system interfaces (APIs). Secure API integration with Snowflake/ Fabric or equivalent EDW platform.
 - Audit logging of user queries and responses. Keep proper logs of user queries and system responses to ensure transparency, traceability, and compliance with data governance rules.

B. PREFERRED CAPABILITIES

- Real-time retrieval of KPI summaries, performance comparisons, trend interpretation and variance explanation
- Governance & Compliance:
 - Hierarchical drill-down support (Global – Region – MA – Service Point). Role-based access control (RBAC) and response filtering.
 - Prevent hallucinated responses through controlled AI guardrails.
 - Align with IPPF’s data governance framework.
- Ensure compliance with GDPR and internal data protection policies

C. FUTURE EXTENSIBILITY OPPORTUNITIES

- AI-assisted anomaly detection in financial and programmatic data for root Cause analysis & insights
- Intelligent prompts for deeper data exploration.
- Recommendations for underperforming indicators
- Performance benchmarking alerts and auto-generated executive-ready performance briefings

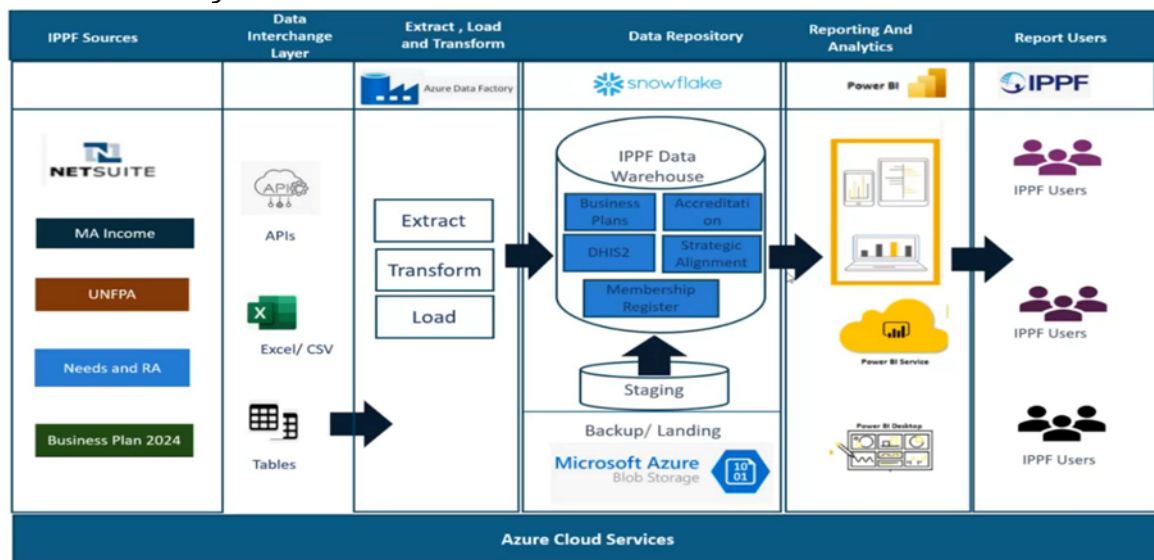
Annexure 2 – Solution Architecture design

The existing dashboard architecture is built on Microsoft Azure cloud services and is designed around a structured data integration and reporting framework.

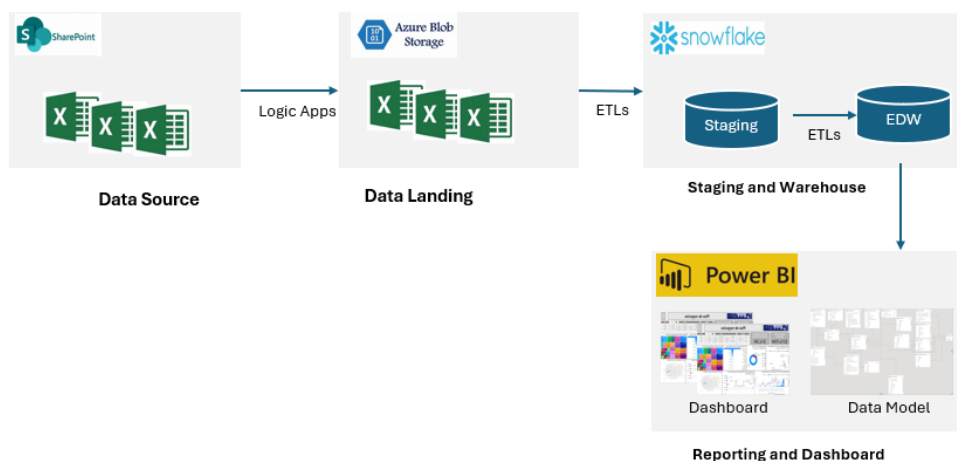
Data is ingested and orchestrated using Azure Data Factory, where it undergoes Extract, Transform, and Load (ETL) processes. The transformed data is initially stored in a staging environment and backup/landing layer (Azure Blob Storage) before being consolidated into the centralized IPPF Data Warehouse hosted on Snowflake.

Reporting and analytics are delivered through Power BI, with dashboards published via the Power BI Service and accessed by IPPF users.

Overall, the architecture establishes a centralized, secure, and scalable cloud-based data platform that enables integrated reporting, advanced analytics, and informed decision-making across IPPF.



Annexure-3 IPPF Dashboard Data Flow



In Phase 2, data from multiple source systems primarily provided in Excel format is ingested into a centralized cloud environment. The raw files are first stored in Azure Blob Storage, which acts as the data landing layer. Azure Data Factory pipelines then perform Extract, Transform, and Load (ETL) processes to cleanse, validate, and standardize the data. The processed data is initially loaded into a staging layer in Snowflake for intermediate validation before being consolidated into the Snowflake Enterprise Data Warehouse (EDW). This centralized warehouse serves as the single source of truth for reporting and analytics. Power BI connects to the EDW to generate dashboards and reports that are accessed by users for monitoring and decision-making.



Annexure-4 - Compliance Matrix

The "Proposed Approach / Solution Description" column is **mandatory**. Bidders must provide a clear, structured, and technically detailed explanation of how each requirement will be met. Generic responses such as "Will comply" or "As per standard practice" will not be considered sufficient.