

Request for Proposals (RFP)

RFP No. **ME16_005 (Revised)**

Development of a Programme Database and Integrated Management Information System Consultancy

1.0 Background

The Macroeconomic and Financial Management Institute of Eastern and Southern Africa (MEFMI) is a regionally owned institute, currently with 14 member countries: Angola, Botswana, Burundi, Kenya, Lesotho, Malawi, Mozambique, Namibia, Rwanda, Swaziland, Tanzania, Uganda, Zambia and Zimbabwe.

MEFMI undertakes capacity building activities in its 14 member countries aimed at improving macroeconomic and financial management and performance so as to contribute to the reduction of poverty in these countries. To enable effective Monitoring and Evaluation (M&E) of the Institute's Programmes, MEFMI collects and analyses data on individuals and institutions that participate in its capacity building activities.

The current practice is able to capture and report on the key performance indicators, the full potential of a robust results-based M&E system have not been fully exploited. The Institute has a number of databases but these are all stand alone and not synchronised. The existing M&E processes are largely manual, tedious and time consuming in terms of generating and using the information for decision making. M&E skills and competencies of MEFMI staff are fairly adequate, but require further training and technical support, especially as MEFMI seeks to adopt a robust and automated M&E system. Data is currently collected and stored using several software including MS Access, MS Word, MS Excel, and Pastel Accounting System which makes it difficult to manage and analyse, in real time. While most of the activity and programme data is stored in the activity database, more information on financial and human resources, amongst others, is stored in other systems which are not linked, and readily available.

This has resulted in difficulties of accessing the necessary data and information, processing and analysis, comparing performance across departments and projects, as well as responding adequately, and timely to the information needs of member states and other key stakeholders.

The Institute is therefore, inviting proposals from qualified Consultants/Firms to develop a comprehensive programme database and Integrated Management Information System (IMIS) to support effective processing, storage and sharing of information in 2017 and beyond. The consultant will also be required to build capacity within MEFMI to use and maintain the developed database and system. The assignment may therefore be divided into 2 broad phases covering Phase I: Database development and deployment, and Phase II: Integrated System development and deployment.

2.0 Objectives

The objectives of this consultancy are to:

- 1) Develop and install a **comprehensive and secure programme database system**, with corresponding dashboard which is consistent with MEFMI's pre-determined and modifiable indicators and reporting requirements;
- 2) Develop **standard procedures and guidelines for maintaining the database, and the integrated system**;
- 3) **Improve the competence (application of knowledge and skills) of MEFMI staff** in using and maintaining the developed database and standards.
- 4) Develop and install a secure and web based **Integrated Management Information System (IMIS)**, which can adequately integrate information from different systems across departments and projects. Strengthen the processing, management and sharing of MEFMI's information internally and externally with stakeholders.

3.0 Duty Station

It is preferred that the consultant be based in Zimbabwe but applicants working elsewhere will be considered as long as they would be able to keep in regular contact with the team based in Zimbabwe, and be willing to travel to Zimbabwe to conduct tasks which require direct contact with the team such as consultations, piloting the database, training of staff, as well as resolving issues relevant to the objectives of this consultancy.

4.0 Scope of Work

Whereas MEFMI has provided the general scope of work for this assignment below, the consultant is expected to propose a plausible approach for undertaking this assignment, covering the design/customisation of a web enabled programme activity database system, and subsequently the linking and integration of the programme activity database system with existing databases and systems to produce a web enabled Integrated Management Information System (IMIS). The activity database and Integrated Management Information System must be web-based and should ideally use open source technologies.

Phase I: Programme Database

- i. Perform a detailed review of existing documentation on system assessment, amongst others.
- ii. Familiarise with existing databases and systems (refer to annexure).
- iii. Develop a written plan for development of a database system which is specific to the needs of MEFMI, as well as uploading and cleaning procedures. The consultant will work with the Programme Managers, Monitoring and Evaluation, and Information Technology of MEFMI as focal points for this assignment to develop the written plan and ensure that the Managers develop the necessary expertise to use the software and hardware for the developed database system. Issues to determine include:
 - a) What database platform will be used?
 - b) What functional and non-functional requirements are necessary?
 - c) What information will be used for the Management Dashboard?

- d) What are the critical processes which can produce the required information products from the IMIS?
 - e) What data and metadata standards will be employed?
 - f) What procedures will be used to ensure quality (accuracy, integrity, and completeness)?
 - g) How will data storage and preservation be handled?
 - h) How will data security management (access, erasure, security, privacy) be ensured?
 - i) How will long-term access be ensured?
 - j) What procedures will be used to process, upload, transfer, and share data?
- iv. A major portion of the data is currently in the MS Access database. The assignment will entail data cleaning, editing and capturing of existing data in the MS Access database as well as other databases, then uploading. The consultant will write the program for cleaning and uploading data and will test these procedures with each Department. It will be necessary to pilot them, make modifications and conduct trainings. During the course of this consultancy the consultant will ensure that all necessary data is uploaded and cleaned. Data and information will be reported periodically to member states and partners, hence the consultant will design a Management Dashboard to report critical information, and make this information accessible on-line. Depending on the future requirements, the number of both the IMIS Reports, Fields, Where and What Data, Information should be captured, may increase. Hence shall be discussed with the Departments and decided after conducting the system review, familiarization and document review specified in this RFP during the course of implementation of the database system Solution.
- v. Develop a Standard Operating Procedures Manual. The consultant will develop a standard operating procedures manual that will include an explanation on how:
 - a) data are entered
 - b) to use the data cleaning program
 - c) to aggregate data from different time periods such as phases, across Departments and countries/member states
 - d) to transfer data to member states and partners
 - e) to store and freeze data
 - f) to secure and protect data.
- vi. Data entry and use. As needed, the consultant will train MEFMI staff on the various procedures for the activity database, including data extraction, analysis, visualisation, reporting/transfer and management.
- vii. Using learnings from this consultancy, the Consultant will provide the Management with recommendations for the development of an overarching MEFMI Integrated Information Management System (IMIS) which is secure and web-enabled, linking all databases (including, activity, e-learning, on-line registration, website, HR-VIP, PCMS, Pastel, Quantrix, amongst others) and systems across Departments and projects. Issues to determine include:
 - a) Which web-enabled platform should be used? What are the pros and cons of different platforms?
 - b) What equipment and infrastructure are required?
 - c) How should data storage and preservation be handled?
 - d) How should data security management (access, erasure, security, privacy) be ensured?
 - e) How should long-term access be ensured?

- f) What procedures should be used to enable integration of data across databases and systems?
- g) How should interactive querying be handled?
- h) How should interactive visualization be handled?
- i) Information procedures should enable transfer/sharing of data and systems (e.g. via web, mobile devices and SMS)
- j) The web-based on-screen user interface should be through an information portal, with standard features such as a search engine, input screens and option to generate reports / output in various formats by the Users. The system should also support generation of reports centrally at scheduled intervals and printouts distributable in various File Formats viz. Text, Excel; PDF etc.
- k) The application should be capable of scaling up and hardware configuration as per the sizing document should be capable of catering to the requirements of MEFMI for at least the next five years.
- l) The Solution should also enable sharing/publication of visualizations
- m) The Solution is to be implemented at MEFMI in Harare.
- n) The Solution should preferably be based on the Hardware Platforms/Databases/System Software in line with the ones already in use at MEFMI
- o) The Consultant shall provide the detailed Solution Architecture showing all the internal components of transaction workflow.
- p) The Solution should meet all system related requirements elaborated in this RFP, covered in scope, functional and other requirements in totality.

Phase II: Integrated Management Information System

1. Design the Integrated System based on the Phase I recommendations and system requirements
2. Link and Integrate the Programme Activity database system with existing databases and systems
3. Perform unit tests and functional tests
4. Produce complete technical documentation
5. Configure all settings
6. Perform system deployment on the server
7. Produce training material
8. Train system administrators and users on the Integrated System operations
9. Provide technical and user support services

5.0 Tasks and Deliverables

The Consultant is expected to develop a proposal for the recommended systems, work plan and schedule of tasks, with corresponding deliverables.

6.0 Duration

The Consultant is expected to propose a plausible duration, aligned to the scope and methodology for undertaking this assignment.

7.0 Skills and Experience Required

The lead consultant should have the following skills and qualifications:

- i. Advanced degree (Masters Level) in a relevant field (Computer Science, Data/Information Management, Advanced Statistical Analysis, Information Technology, and Software Engineering).
- ii. At least 10 years' experience related to data management/database development and archiving, including use of web-enabled platforms and common statistical analysis tools
- iii. At least 7 years' experience in M&E or M&E systems design
- iv. Prior experience with data management of data sets from developing countries, systems development and management within Eastern and Southern Africa are highly desirable.
- v. Existence of an M&E system/Database/Information web-based solution
- vi. Strong experience in development of web applications
- vii. Competent knowledge/practise of AGILE methodology and good practices
- viii. Competent and dedicated staff that can be reached for feedback
- ix. Staff having at least 5 years of related work experience
- x. Excellent communication and writing skills
- xi. Prior experience with MEFMI or its 14 Member States is an added advantage.

8.0 Evaluation

The purpose of evaluation is to determine the technically compliant and competent bid from amongst the substantially responsive bids received by MEFMI. In order to determine the lowest evaluated proposal, MEFMI shall adopt a systematic evaluation process comprising of the following 3 logical steps:

1. Bidders will be short listed first on the basis of qualifying eligibility criteria and then responsiveness of the Bid in meeting scope, understanding of the concept, competence to meet the Functional Requirements and others, as detailed in this RFP Document i.e. evaluation of the Bids shall be done by MEFMI on Technical, Functional Parameters as well as experience and capability of the Bidder to implement the Database and IMIS Solution.
2. Successful consultants/firms will then be invited to make a presentation of the Database and IMIS Solution/Product, demonstrate the Product 'Walk through' and if required, MEFMI will visit the organisation(s) where the Product is successfully implemented by them.
3. Based on the presentations, successful bidders will be invited to submit detailed Technical proposals covering system specifications and design, as well as a corresponding Financial proposal for a Commercial evaluation. MEFMI shall evaluate the bidders for their readiness of the product and capabilities to meet the functional, operational and other requirements, and accordingly MEFMI shall take a decision for selecting the successful consultant/firm.

Evaluations shall be performed as per the criterion determined by MEFMI.

8.1 Technical Evaluation

MEFMI will evaluate technical bids on the following broad criteria:

Technical Completeness of the bid containing details of:

- a) Clear Process Flow/Functionality of the entire solution for the database and Management Information System
- b) Platform proposed
- c) Compliance with scope of work,
- d) Compliance with Functional Requirements and Technical Requirements.

- e) Qualifications of the Consultant and staff proposed for the assignment
- f) Consultant/Firm's experience and competency with data management and development of Management Information Systems within Eastern and Southern Africa.
- g) Experience in the Macroeconomic and Financial Management Sector and ability to provide a complete solution.
- h) Evaluation of functional capabilities of the IMIS Solution offered, through product presentation, product walk through.

9.0 Submission of Proposals

MEFMI is now inviting qualified firms and consultants to submit their **Technical Proposals** including a cover letter with subject line: ***MEFMI Programme Database and Integrated Management Information System Development Consultancy and CVs*** to the following address:

The Macroeconomic Financial Management Institute (MEFMI)
 9 Earls Road, Alexandra Park,
 P O Box A1419 Avondale,
 Harare,
ZIMBABWE

OR Email: [capacity\(at\)mefmi\(dot\)org](mailto:capacity@mefmi.org) with subject: "Technical Proposal to develop MEFMI Database and IMIS". The proposals should arrive by **18th November, 2016 at 16.00 hours**. For any enquiries regarding this RFP, send an email to [capacity\(at\)mefmi\(dot\)org](mailto:capacity@mefmi.org)

The submissions should include the following documents:

- a) Copies of certificate of registration / incorporation (for firms)
- b) Names and contacts of Directors (for firms)
- c) Company profile (for firms)
- d) Curriculum Vitae of proposed project team members
- e) Tax registration certificates (Income Tax and VAT in case of firms)
- f) Full contact details (physical address, telephone and fax numbers and e-mail addresses)
- g) Contact person and contact details of Project Lead/Manager(for firms)
- h) Profile of previous work done which is related to this assignment
- i) Three references and contacts of three referees
- j) Certificates of completion of previous work
- k) Payment and Billing Terms, including the cancellation clauses

ANNEXURE

Annex 1: Prioritised Requirements

Table 2: Prioritised non-functional requirements

Any Type of Hosting

Priority	Priority description	Description
1	Mandatory	User friendly
1	Mandatory	Support 256kbps
1	Mandatory	Integrates with Moodle, Pastel, Quantrix, VIP HR and Payroll
2	Important	Integrates with Active Directory
1	Mandatory	Use the corporate branding conventions for interfaces and reports
1	Mandatory	Multi-language support (English, Portuguese and French)
1	Mandatory	Support of Internet Explorer down to version 8
1	Mandatory	Support of other browsers
1	Mandatory	Supports 80 users logged at the same time
1	Mandatory	Supports at least 5 year period of storage of data
2	Important	Availability of 99.5%
2	Important	Integrates with External Audit Recommendation portal
2	Important	Solution is operational/compatible with offline mode and or desktop versions
2	Important	Support mobile devices running Android, Windows and iOS tablets (iPad)
3	Nice to have	Single Sign-on
3	Nice to have	Open source license for product
3	Nice to have	Open source license for components
3	Nice to have	License to own the source code

Hosting at MEFMI

Priority	Priority description	Description
1	Mandatory	Data storage compatible with SQL Server 2008
1	Mandatory	Live integration with Moodle, Pastel, Quantrix, VIP Payroll.
2	Important	Live integration with Active Directory
1	Mandatory	Installs on Windows Server 2012 R2
2	Important	Live integration with External Audit Recommendation portal
2	Important	Installs on IIS

Outsourced hosting

Priority	Priority description	Description
1	Mandatory	Data storage compatible with SQL Server 2008
1	Mandatory	Integration with Moodle, Pastel, Quantrix, VIP Payroll, HR
2	Important	Offline integration with Active Directory

Table 3: Prioritized functional requirements

Project Cycle

Priority	Priority description	Description
1	Mandatory	Phase information
1	Mandatory	Projects information
1	Mandatory	Departmental information
1	Mandatory	M&E Framework creation (specific objectives, outcomes, outputs, activities, indicators and meta data)
1	Mandatory	Annual planning (Implementation plan & M&E Plan)
1	Mandatory	Quarterly Reporting (Implementation status, Next Quarter plan, finances)
1	Mandatory	Annual Reporting
1	Mandatory	Core indicators
1	Mandatory	Categorized indicators
1	Mandatory	Qualitative indicators
1	Mandatory	Validation process for M&E Framework, Annual planning & Quarterly Reporting
1	Mandatory	Reports with aggregate core indicators by programme and department, project, period, countries or categories (several)
2	Important	Procurements
2	Important	Surveys (Activity Evaluations, Tracers, Baselines, Impact and Needs, Mid-Term, Opinion polls)
3	Nice to have	Success stories
3	Nice to have	Geographical Viewer

Corporate Cycle

Priority	Priority description	Description
1	Mandatory	Annual Work Programme/Business Plan
1	Mandatory	Monthly Implementation Reporting
1	Mandatory	Validation process for Annual Work Programme/Business Plan & Monthly Implementation Reporting
1	Mandatory	Reports with corporate indicators aggregation by departments or periods

Others

Priority	Priority description	Description
1	Mandatory	Security by profiles
1	Mandatory	Audit trail for all transactions
2	Important	Upload documents (photos, videos, files)
3	Nice to have	Contacts management