



UGANDA YOUTH AND ADOLESCENTS HEALTH FORUM

Plot 1238, Bukoto 1 - UCB Zone, P.O Box 25914 - Kampala, Uganda
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TERMS OF REFERENCE: Consultancy for the Establishment of Web-enabled Monitoring and Evaluation / Integrated Performance Management Information System (IPMIS)

Overview

Title: Consultancy for the Establishment of Web-enabled (Online) Monitoring and Evaluation / Integrated Performance Management Information System (IPMIS)

Type of contract: Individual Consultant(s) or Consulting Firm / Institution

Duration of contract: June - September 2023: 60 days spread over a period of four months

Summary:

The consultant/consulting firm is required to develop an integrated online (web enabled) PMIS for Uganda Youth and Adolescents Health Forum. The online system will be designed to support program monitoring, evaluation, learning, Knowledge management and information sharing about the periodic implementation status as well as outputs and outcomes of the program in relation to UYAHF's Results Framework and Theory of Change. The online system must allow for quantitative and qualitative data entry provisions and at national and regional levels. The system must also facilitate data analysis and generation of informative reports at different frequencies.

1) About UYAHF

UYAHF is a dynamic Youth led and Youth Serving Health, Human Rights, and Girl Centred Organization that seeks to advance quality health and wellbeing for young people. Specifically, UYAHF works to address and advance young people's specific needs as regards their sexual reproductive health and rights (SRHR), gender equality and health promotion, livelihoods, climate change, and SGBV among others.

UYAHF's program implementation is guided by 4 critical themes in the strategic plan. These include.

- a) Objective 1: To promote increased access to sexual and reproductive health services, information and products, and the integration of ASRH into national strategies and programmes.
- b) Objective 2: To mobilise social and political support for girls' equal opportunities and equity
- c) Objective 3: To promote full and productive employment and decent work for young people
- d) Objective 4: To enhance the organisation's institutional arrangements for pragmatic governance and management

Each objective is associated to outcomes and indicators. The primary means of gathering data against these performance indicators and outcomes is through bi-annual narrative reports, providing both quantitative and qualitative data while reports are supported by evidence of results reported.

2) Background and Context of the Assignment

The current monitoring and reporting systems and requirements are rigid, complex and, while improvements have constantly been made; they are still inefficient. First, reporting processes and requirements for coalitions are burdensome, as they are required to report on finances quarterly, while UYAHF narrative reporting is done annually. As well as being a burden on coalitions, this additional reporting does not add sufficient value to the programme's understanding of its outputs and outcomes as it is predominantly activity-based. Reporting templates have continued to evolve since the inception of UYAHF. While the changes to the templates have not been particularly structural and have been mainly driven by feedback from coalitions and based on lessons learned about what has worked well to



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generate useful information, the fact that the changes have been consistently made has not always been received as positive. These changes - while well-intended - have increased complexity for coalitions and impacted negatively on their ability to learn effective monitoring and reporting processes, and to effectively store and use information and report. Data capture, analysis and regional and global report generation is complex and cumbersome, as the reporting templates and components are provided in different formats (MS Word and MS Excel), and manual transfer of information across multiple formats is tedious, time consuming and leaves space for error. The disconnect between national-regional and national-global reporting, while also driven by limited resources at the regional and national levels, does not contribute to a comprehensive understanding of the programme and its results.





Furthermore, there is insufficient staffing within the UYAHF structure dedicated to the monitoring processes. The monitoring structure as a whole is under-resourced, including staffing at the UYAHF office. The existing system has helped in terms of drawing quantitative data out of the system and has made it easier to provide and capture these figures related to the Results Framework. It does not however contribute significantly to an understanding of programmatic results. The system does not contribute to story-telling – to developing a qualitative approach by coalitions for them to express their work, successes, and learning, in a well-developed and strong narrative that can be widely shared.

In addition, there is insufficient knowledge and skills in coalitions to use the monitoring system effectively for the benefit of the coalition and for effective use by UYAHF staff in programme reporting. Furthermore, there is need for a greater regional/district focus, aggregation and reporting up to the national level. UYAHF has a huge task to provide oversight, but results are difficult to trace, and reporting cannot be guaranteed to be of consistent quality. Another important hindering factor is that there has not been any significant training in the existing system across the whole of the organisation.

3) Purpose and Objectives of the Assignment

The overall purpose of this consultancy is to support UYAHF to improve the current systems for management of monitoring, evaluation, and performance information, through the design and development of an integrated online (web-enabled) Performance Management Information System (IPMIS).

More specifically, the objectives of this consultancy are:

-  To define requirements for an integrated online (web-based) Performance Management Information System accessible to different stakeholders across five languages and with varying levels of access, to enhance the ability of UYAHF to monitor results periodically
-  To design and develop the system as a common tool for reporting and assessing performance and development results.
-  Clearly define roles and responsibilities for the system users at national coalition, regional and global secretariat levels
-  To build the capacity of the relevant staff to manage the system on a sustainable basis through specific training, help documents and tutorials.

4) Details of the Assignment

The assignment can be broken down into four main components as discussed below. However, it should be noted that the terms outlined within this document are a high-level description. It will be the role of the consultant to propose the specific and comprehensive low-level technical requirements for each of the components of the assignment.








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4.1 Prototype model

The consultant will be responsible for defining the requirements of the desired system in consultation with all key stakeholders. *In summary, the Consultant will be expected, among other duties, to:*

-  Establish requirements of the new system based on UYAHF's program Results Framework and Theory of Change.
-  Identify possible linkages with results collected and managed at national and regional levels and available IT infrastructure and facilitate a discussion on realising the links.
-  Facilitate consultations on internet connectivity requirements at all levels (national, and regional)
-  Define roles and responsibilities for the system administrators and users; and
-  Develop and present a prototype model for the new system and supporting IT infrastructure.

4.2 Integrated performance management information system (IPMIS)

The consultant will develop a user-friendly PMIS, accessible to different stakeholders, and with varying levels of access and authority. The system must be designed in a way that all core monitoring and evaluation tasks can be easily undertaken by national and regional [district] programme staff. The new system will be a web-based platform that contains and tracks down the achievement of performance indicators and targets of major planning and reporting documents in use by UYAHF such as the Results Framework, national and regional, implementation plans, program-based budgets, performance contracts, and relevant information on performance of operations. The system should contain the logic models of the above documents (indicators, targets, budget allocations). It should also allow necessary data entry or importing of data from other information systems and data sources, i.e., HMIS, Dhis2, national coalitions and networks etc. The system should work both offline and online.

More specifically, the IPMIS should have the following functionality:

- a) Planning - data entry and notifications system
- b) Monitoring – data entry, export in various formats
- c) Reporting – geographical view (regional and global), reports, graphs, and ad-hoc custom reporting capability and ability to generate Geographical Map visualizations.
- d) Role-based user dashboards that cumulate data, for easy-to-use data visualization and highlighting projects and tasks that require attentions; and
- e) Key programme updates featuring images, human interest journals, measurements, accomplishments, narratives, and custom fields for complete data collection.

The system should also:

- a) Have web-based front end data entry tools using appropriate and efficient web technologies as well as web-based querying tools for data retrieval.
- b) Ensure data retrieval/exchange capability with other national and regional structures systems and databases as agreed in the first part of the assignment.
- c) Have relevant import / export capabilities to pre-designed templates or databases.
- d) Display summary pages showing data from all available sources, aggregate statistics and summary visuals which illuminate what is and is not working.
- e) Present summary dashboards showing progress
- f) Allow users to overlay and/or compare data on activities, outputs, and outcomes with data on programme spending and aggregated results against programme indicators data.
- g) Provide administrators with intuitive tools for reconciling discrepancies between different data sources, and a clear indication in the event that any link between systems becomes inoperable or offline.



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- h) Provide administrators with tools for defining core headline indicators and defining the relationship between those indicators and higher-level programme objectives.
- i) Provide a database administration module, allowing for advanced user management, with a staggered set of privileges for different users as well as user authorization, tracking/authorizing changes to results hierarchy, database download, online backup, and other necessary features
- j) Integration with a Knowledge Management platform.
- k) Have web-based APIs for integration with other systems.
- l) Ability to use USSD and/or Android technologies for data collection & reporting.

The objective will therefore be to collect as much raw real-time data as possible, that can be accessed from anywhere, anytime over the internet, then harness role-based user dashboard tools incorporated into the IPMIS to generate useful information that can be automatically populated onto a website portal. A reporting module will permit users to create and export customised reports on subsets of the data held in the system, which would be invaluable for programme monitoring and management and to enable focus on addressing identified priority needs. The IPMIS portal would present the information in a variety of ways depending on the preference of the person accessing data. An example would be a regional/district level module where primary data captured at source could be aggregated and displayed as reports and graphs for use at the regional level. The IPMIS will also provide a platform for interval (quarterly/half-yearly/yearly) reviews, generating automated reports which allow reporting of progress against the annual targets and results ascribed in the UYAHF programme Results Framework.

The proposed IPMIS may use a Software-as-a-Service (SaaS) model modified to cover more than national and regional data. The system will be hosted at UYAHF with diffident level. Administrator rights who will ensure timely data entry and quality of data in the IPMIS for the strategic documents they are in charge of. Data entry will be carried out by national and regional M&E focal points/representatives, through a web-based self-registration process, followed by authorization.

4.3 Knowledge Management (KM) Platform

To facilitate better communication across national coalitions and regions, the Knowledge Management Platform will serve as a place where M&E focal points can share and manage files, calendars, media etc. The Knowledge Management Platform will be integrated into IPMIS.

More specifically, the Knowledge Management System should include:

- a. Capacity to create groups, portals etc.
- b. Hosting of various “shared” areas where users can upload, edit, and share files.
- c. System administrators with the capacity to manage groups, areas etc.
- d. Flexible architecture which allows for the adding/removing of pages, sections etc.; and
- e. Integration of existing shared databases and platforms.

4.4 Training

Sustainability is an important aspect of the assignment, and it is important that relevant UYAHF staff are fully trained and engaged with the system developed. With this in mind, the consultant will be expected to hold multiple planning and review dialogues with key stakeholders in order to ensure that the system is both relevant and useful to partners and that a sustainability plan is in place. All installation steps and steps for linking database systems to the IPMIS must be documented and communicated to staff clearly.

Further to this, the consultant will be expected to:

- a. Develop training handbooks and IPMIS “How to Guides”.
- b. Develop video tutorials and other help systems.



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- c. Develop technical documents including requirements analysis, design documents and user/admin manuals.
- d. Conduct specific training to relevant staff and partners on each area of the assignment.
- e. Ensure relevant staff are in a position to manage all components of the system upon inception and modify them as needs arise.

5) Deliverables

The following deliverables of the assignment have been identified and will be tied to the release of funds.

- a. Prototype for IPMIS widely shared and agreed.
- b. IPMIS system and individual modules on it developed and operational.
- c. Knowledge Management (KM) platform developed and operational; and
- d. Staff training, training modules, help systems and technical documents, and handover completed.

6) Reporting

The Consultant will be expected to deliver the following:

- a) **Inception Report** – the consultant should produce an Inception Report within 7 days after the contract is signed. The report should provide a clear picture of how the consultant understands the ToRs and intends to achieve the expected tasks; methodology and work plan with timelines for all the tasks that the consultant will undertake during the assignment.
- b) **Prototype report** – the consultant should present a report determining the requirements to the system and a prototype model within 20 workdays after commencement of the assignment. The report will be presented for validation by a reference committee.
- c) **Completion Report** – upon completion of the assignment, the consultant should submit a final completion report outlining all work undertaken.
- d) In addition, **work outputs** should be shared **on a monthly basis** to ensure alignment between the ToRs and actual work completed.

7) Time frame

The assignment is for 60 working days from the date the contract is signed. The assignment is expected to be implemented between June and September 2023.

8) Required skills and experience

Educational Qualifications:

Interested individual consultants or lead developer for consulting firms should hold:

- ✚ At least a master's degree in IT, Information management, or another related discipline

Experience:

- ✚ At least seven years' experience in developing IT solutions and providing IT support and maintenance services.
- ✚ Proven professional experience in developing and managing databases within the non-profit sector and government health sector.
- ✚ Proven professional experience in web technologies, including their development and deployment, and development of web-based information systems; and
- ✚ Good understanding of development results, PMPs, PIRS and Results Based Management Concepts.

11. Application procedure:



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Submissions:

Interested individual consultants/consulting firms must submit the following documents/information to demonstrate their suitability for the assignment:

- ✚ Up-to-date Curricula Vitae (CV) for each of the expert(s) proposed to work on this assignment including past experience in similar projects and 3 (three) references.
- ✚ Technical Proposal presenting methodology of work and approach; and
- ✚ Financial proposal expressed as a Lump sum for 60 working days.

Evaluation criteria:

The award of the contract shall be made to the consultant who has received the highest score out of pre-determined technical and financial criteria specific to the solicitation.

- Technical criteria weight – 70 %
- Financial criteria weight – 30 %

Criteria	Weight	Points
Technical	70%	70
Educational background / qualifications	10%	10
✚ At least seven years' experience in developing IT solutions and providing IT support and maintenance services	20%	30
✚ Proven professional experience in developing and managing databases within the non-profit sector	20%	10
✚ Proven professional experience in web technologies, including their development and deployment, and development of web-based information systems	10%	10
✚ Good understanding of development results and Results Based Management Concepts	10%	10
Financial	30%	30

Deadline for submissions: The submissions must reach the following address infouyahf@gmail.com and copied to jnakato@uyahf.com by **30th June 2023**.