Section 1: Terms of Reference (TOR) for Consultancy services for the Design, Creation, Testing and Commissioning of a Management Information System (MIS) for GESA - Kashf Foundation.

1.   Project Background:

The 'Financial Literacy and Business Development for Women' program is being conducted by Kashf Foundation. The areas of intervention identified are given below:

Capacity Building	Advocacy & Well-being
1. Financial Management Skills Business 2. Acceleration Skills	1. Gender Sensitization 2. Reproductive Health Trainings 3. Public Advocacy on Pertinent Issues

1.1   Current status

At present, the system at GESA, Kashf is a basic analog, paper based system, which is then digitized with laptops, internet connection, and email. There is no specialist and adapted MIS software for centrally managing the information requirements of the department. In line with the operationalization and institutional strengthening strategies of the institution, a robust, up-to-date, fully-fledged and integrated (software) MIS system is required. It is therefore proposed to design and implement a **Management Information System (MIS)** for GESA, Kashf so that the institution is fully equipped, using paperless technologies, to meet the developmental objectives.

2.   Proposed Sequence for implementation of MIS

It is proposed that the Management Information System (MIS) for Kashf be implemented using a phased approach. The following 4 phases would be considered:

•   **Phase I – Gap Analysis & Requirements Documentation**

a)   A thorough assessment of any existing MIS and/or IT system at the institution which shall entail a review of the current hardware and software capabilities;

b)   Consultations, based on the minimum requirements defined in the table below, with the main stakeholder (i.e. Kashf as well as secondary stakeholders involved with the institution) followed by a detailed gap analysis;

c)   Submission of detailed hardware, software and specifications for the MIS in the form of a comprehensive requirements documentation together with a template for the maintenance contract for a period of 5 years for the MIS software supplier(s)/contractor(s);

d)   Submission of a detailed list of requirements and specifications for the creation of a versatile, modular, user-friendly, upgradable and scalable (amongst others) MIS for approval from Kashf;

- **Phase II –Procurement of Equipment and Services**

Following recommendations from Phase I, the procurement of the equipment and services for the setting up of the MIS will be undertaken by Kashf. A complete BOQ will be submitted with options including equipment. Options meaning there can be a cloud based solution, plus pay for service platform etc.

- **Phase III – MIS development**
a)   Kashf will supervise the installation, testing and commissioning of all software and hardware, as carried out by any appointed sub-contractors under Phase II, to ensure adherence to all requirements and specifications in the Terms of References.
b)   The contractor will be responsible for the creation of a versatile, modular, user-friendly, upgradable and scalable (amongst others) android application/admin portal for Kashf; The MIS should at least address all the requirements given below in the requirements matrix.

- **Phase IV – Technical Documentation, Operation Manual, UAT and Training**

a)   Following successful installation, commissioning and testing of the MIS, a User Acceptance Test (UAT) is to be carried out (either as part of the commissioning or after) and a UAT report submitted for review and approval to Kashf;

b)   Submission of a comprehensive Technical documentation, Operation and User - Maintenance Manual, Training/Capacity Building for the staff on the manual and MIS, followed by handing over of the completed MIS.

Table: Requirements Matrix for the implementation of the MIS at Kashf

AREA	REQUIREMENT	DESCRIPTION	COMMENTS
General	R.1 The MIS should satisfy the following inherent features: i) Paperless, electronic and webbased solution ii) Cost-efficient iii) High scalability iv) Ease of upgrade i.e. no code update, setup driven, no locked in technology. v) Modular (if deemed appropriate) vi) High user-friendliness and operationally vii) Ease of user management viii) Interconnection capability with other institution's MIS, i.e. MWX ix) The Management System should allow for uploading, safekeeping, sharing, processing, retrieving and reporting amongst others, of data and information relating to the day-to-day operations and	The MIS should be an efficient, comprehensive and cost efficient interconnected system that provides the best IT and communication solutions to allow smooth running of the Kashf office. It should be user friendly, easily scalable and upgradable as well as incorporate a document repository and management system, and setup driven scoring of questionnaire along with evaluation of interventions and studies conducted, amongst others.	The system should consist of all hardware and software systems, as well as any other ancillary equipment, services and applications where necessary, that make up a fully-integrated, functional and operational MIS to allow all staff to use the system efficiently, in line with paperless strategy.

	trainings, and financial/resource management. x) The organization (Kashf) should have clear ownership of the system.		

Hardware	R.2 Physical layout	The physical layout, electrical, environmental (air conditioning) and maintenance requirements of all the equipment that includes accessories, servers, server room (if any), switches, routers etc within the MIS should be clearly documented	The space allocation for the setting up of the MIS is the dependent on the proposal of the solution.
	R.5 Mobility	Kashf requires this platform, specifically the data gathering scope of the MIS, be mobile, and run on tablets, and/or mobile phones running android seamlessly, with responsive design.	MIS consultant will recommend on model, type and specifications of for each form factor.
	R.6 Data Management	The MIS should enable various types of documents such as text, spreadsheets, pdfs and presentations to be managed (created, edited, updated, shared, emailed, transferred, deleted etc.) in a paperless, integrated and user-friendly manner.	

Software	R. 7 Basic Functionality	Trainings conducted, the trainees information, the duration and specifics of the training, and the trainer, will be configurable and will be required to be added at the time of planning/ implementing/ conducting the trainings.	Some trainings require data to be fetched from Kashf's loan management system, and the MIS should be able to retrieve, display, use, and store this data with minimal human intervention.
	The software should have, but not necessarily be limited to, the creation, addition, and configuration of the following features		
	i) Trainee profile		
	ii) Trainer profile		
	iii) Setup driven questionnaire and scoring techniques	The Trainings will have data driven input which will later be used to review these trainings, trainers, trainees, and any other Kashf personnel involved.	
	iv) Ability to create, enter, evaluate, and report on cross-sectional and longitudinal studies		
	v) Timesheets that allow easy logging of time and resources, along with ability to get approval from a step higher in the hierarchy.		
	vi) Canned reporting on set standards, which can be retrieved by different hierarchies		
	vii) Coordinate tagging capability along with geo		

	fencing as an option.		
	viii) Ability to integrate and communicate with as-is and future Kashf systems through REST APIs.		
	ix) Ability to handle financial calculations, and payroll, arrears, deductions.		

	R.8 Ability to run offline	Access to the internet is not always a given and the app should be able to run offline, and sync later	Internet connectivity is available through wifi in branches or via sim assigned to each worker. Although it is conceivable some regions in the field may not have appropriate infrastructure to support internet connectivity, and will require the app to be operated offline.
	R.9 Webservices	The platform in the MIS should be capable of supporting web services protocols	Capability to transparently interact with appropriate web services using standard protocols
Communication	R.10 Remote Access Users shall be able to access the platform away from the organization.		Intranet and an Extranet to be implemented as part of the MIS to allow registered stakeholders to have access to specific database and forms. MIS to include functionality that allows stakeholders to have access to the platform. User-managed and configurable access privilege control (by system's admin) should be an inherent aspect of the MIS.

Security	R.12 Confidentiality	The MIS shall provide sufficient security to keep all information provided by potential investors confidential and accessible to privileged users only as controlled and configured by the systems admin. In this respect, a suitable Information Security Management System (ISMS) (based for e.g. on ISO 27001 information security guideline) should therefore form integral part of the MIS and the solution proposed.	A secured system to be implemented within the MIS to keep confidentiality at all times and to give limited access to this information.
	R.13 Security	The MIS shall be effectively secured to prevent possible fraudulent access and software attack. Minimum physical protection should include surge protectors, UPS backup and redundancies. Minimum software level protection should include latest Antivirus incorporating antispyware, ransomware and other malwares. The proposed Antivirus should be centrally served and managed by the systems administrator.	Security is essential at Kashf office to secure information and equipment.

	R.14 Disaster Recovery System	The MIS at Kashf should include a Disaster Recovery System, to allow sensitive and confidential data to be saved in case of technical failure of system or a fire	Stored information at Kashf needs to be able to be saved and retrieved even in case of major technical failure or a fire using a remotely located DRS and Backup solution with automatic switch-over when required.
	R.15 Backup system	As per R.17, a backup system complementary to the Disaster Recovery needs to be installed.	MIS Consultant to recommend the location of the Disaster Recovery and Back Up system, be it on-site or off-site or cloud-based.
Capacity Building	R.16 Support/Training to users	The MIS shall be equipped with a fully-fledged training kit that includes support information to assist users to use the system effectively. Furthermore, the MIS consultant should submit additional staffing requirement w.r.t the MIS and help in the drafting of TOR (Roles and responsibilities) for any future recruited systems administrator(s), as required.	IT consultant to submit a training plan for the current staff and recommend on additional staffing requirement.

3.16 Training/Capacity Building/Workshop For the purposes of training/capacity building in the MIS consultant is expected to provide training/capacity building to the staff of Kashf.

3.17 Deliverables

3.17.1 Description of Deliverables

The MIS consultant is expected to submit the following deliverables during the course of the project:

1)   A detailed workplan for the setting up of the Management Information System at Kashf. The Workplan shall consist of the following:

a.   A detailed Gantt chart showing milestones/major deliverables and activities and highlighting the critical path and version number as well as the duration for the assignment and expected start and completion dates;

b.   Project Implementation Methodology;

c.   Schedule, type and context of consultations with stakeholders (for approval by client)

d.   Any other relevant sections, documents, procedures, processes, literature and references

2)   Following initial consultation rounds, a preliminary design report on the functionalities and hardware/software requirements and specifications for implementation of the MIS will be submitted to Kashf for approval.

3)   Upon approval of preliminary design, submission of a detailed design document which shall include the following (but not limited to):

a.   Detailed process mapping for Kashf towards implementation of the MIS;

b.   Detailed design (architecture, layout, content, modules, layers, functionalities etc.) of the proposed MIS;

c.   Detailed mockup of the software user interface and workings to be approved by Kashf.

d.   Cost estimates of proposed system and technology to be used;

e.   Requirements documentation and software;

f.   Templates for contractual services to be procured within the scope of this assignment as well as post-commissioning maintenance;

g.   Procurement methodologies and timeline (Gantt Chart) (support Kashf for procurement – technical assistance for evaluation of bids for procurement of IT equipment);

h.   Licensing implications for all software (annual maintenance costs, etc);

i.   Any other relevant information and details which are pertinent.

4)   Development, along with installation, testing and commissioning and operationalization of the MIS till handing over.

5)   Development of a detailed technical documentation, user-maintenance and operational manual with as-made system layout/schematics and user-maintenance and troubleshooting procedures for the overall MIS.

6)   A detailed training plan for Kashf staff with training modules on the MIS as an integrated system and on the different component of the system with focus on the hardware and software installed.

7)   Future IT staffing requirements as well as roles & responsibility definition for future system administrator(s) of the MIS.

3.17.2 Submission Procedure

All outputs/deliverables should be submitted to the Project Manager and copied to the Project Coordinator and the MD of Kashf for review. The team will review all outputs/deliverables and their comments shall be communicated to the consultants within 14 days of submission of the output/deliverable. The consultants will then have to consider and incorporate the comments within a period of 2 weeks from the date of receipt of comments. The consultants will have to provide for justifications when comments are not incorporated in the output/deliverable.

3.18 The first development, QA, and implementation cycle of the project to cater to the easy and fluid operations of GESA should be completed by 1ˢᵗ June, 2021.

3.19 Reporting, Presentations and Language

All project implementation documents such as progress reports, draft project documents, templates (application, MIS), preliminary and intermediate designs, layouts, specification documents etc. shall be submitted in editable Microsoft Office Word Version and editable PDF Version, and in hard copies (4 copies) in a scale to be agreed with all stakeholders and in soft copy. The soft copy should not be secured with password(s) to allow printing or copy and paste of extract from the reports.

The language of the assignment shall be in English. All the outputs and deliverables shall be written in English language and should be presented in a format acceptable by Kashf.   All the final versions of the reports and documentation should also be dispatched to the Project Manager electronically. There shall be no security restrictions on printing/editing in the deliverables.

The Consultant will have to submit all the deliverables where applicable, in draft form (in soft format - MS Word) in the first instance, and should thereafter incorporate any comments Kashf may submit, prior to their finalization. Draft reports and documentation would have to be submitted at least 2 weeks before the final reports/documentation are due so that Kashf will have ample time for review. Payment will be made only on the final deliverables, and these final deliverables should be to the satisfaction of the Kashf.

3.20 Logistical Arrangements

All transportation costs and administrative costs related to the execution of the assignment are to be borne by the MIS consultant.

3.21 Delivery and Payment Schedule.

- Deliverables will be the basis for the payment schedule. All reports will be submitted in draft (for comments) and then final.