

# Designing and Delivering an MA-Facing Dashboard: Needs Analysis, Development and Deployment

## Terms of Reference (ToR)

### Background & Strategic Context

The International Planned Parenthood Federation (IPPF) operates through a global network of Member Associations (MAs) and Collaborative Partners (CPs) (hereafter referred to as 'Affiliates') working across more than 150 countries to deliver sexual and reproductive health services, advance rights, and advocate for policy change.

Across the Federation, large volumes of operational, financial, and programmatic data are generated through a range of institutional systems, including service statistics platforms, financial systems, business planning tools, accreditation tracking systems, and grant management platforms. These systems support accountability, performance monitoring, and strategic planning across the organisation.

In recent years, IPPF has been developing a Federation-wide Dashboard to consolidate data from these systems into a central analytics environment. The current dashboard is built on Power BI and integrates data from multiple institutional systems into a centralised architecture designed to function as a "single source of truth."

This environment includes a mix of integration approaches, including API-based data flows (e.g. service delivery data from DHIS2), as well as partially automated and manual data inputs across other systems. Existing data models and reporting structures have primarily been designed for Secretariat-level analysis, with ongoing efforts to strengthen automation, standardisation, and integration across systems as part of the dashboard's phased development.

While the current Dashboard provides significant analytical capability, it was primarily designed for Secretariat use and is not yet structured for direct use by Affiliates. At the same time, there is increasing demand by Affiliates for tools that enable them to engage more effectively with data in ways that are practical, intuitive, and aligned with their operational context.

To respond to this, IPPF is initiating the next phase of the Dashboard initiative, focused on defining Affiliate user needs and functional requirements, and ensuring that the Dashboard evolves into a user-centred platform that supports decision-making across the Federation.

### Purpose of the Consultancy

The purpose of this consultancy is to support IPPF in translating Affiliate needs into a clear, implementation-ready design for an Affiliate-facing dashboard. This includes defining priority use cases, data requirements, and user experience, and guiding the development and deployment of dashboard solutions that enable Affiliates to access, interpret, and use data in a way that is practical, intuitive, and relevant to their operational context.

# Scope of Work, Deliverables and Timeline

The consultant will be responsible for the end-to-end design, development, and rollout of an Affiliate-facing dashboard, building on IPPF's existing Power BI dashboard environment, and integrated data systems. The outputs of this assignment will include a functional specification, a fully operational dashboard, and a structured rollout and training approach to support effective and sustained use across the Federation.

The assignment will be delivered across three interlinked yet distinct parts, as outlined below.

## Part 1: Needs Analysis and Functional Specification (Indicative Timeline 10 – 12 weeks)

Undertake a detailed needs analysis with key stakeholders across the Federation, including Affiliates and Secretariat regional and global teams. Based on these consultations, the consultant will define priority use cases and data needs, identify relevant indicators and data domains, propose an appropriate dashboard structure and user experience, and define key considerations for governance, access, and responsible data use.

The consultant will undertake the following components as part of the assignment:

| Component                                   | Description  | Key Deliverable(s)                |
|---|--|-----------------------------------|
| <b>1. Inception Report and Workplan</b>     | Develop the overall approach to the assignment, including methodology, stakeholder engagement plan, detailed work plan, timelines, and identification of key risks and mitigation strategies. This will also include an initial review of the existing dashboard and relevant documentation.   | Inception Report and Workplan     |
| <b>2. Needs Analysis and Design Report</b>  | Conduct stakeholder consultations and a structured needs assessment across Affiliates and Secretariat teams. Based on this, define and prioritise key use cases and user requirements; assess and prioritise relevant indicators and data domains e.g. service delivery, financial performance, grants, etc.); propose governance and access considerations; and develop user journeys, dashboard structure, and illustrative design concepts. All findings should be validated through structured engagement with selected stakeholders and refined based on feedback and consolidated into a coherent design approach. | Needs Analysis and Design Report  |
| <b>3. Functional Specification Document</b> | Consolidate all validated outputs into a comprehensive, implementation-ready specification. This should clearly define priority use cases, data requirements and indicators, dashboard structure and functionality, user experience principles, and governance and access framework to guide subsequent development and deployment.  | Functional Specification Document |

## Part 2: Dashboard Development, Implementation and Iteration (Indicative Timeline 10 – 12 weeks)

The IPPF Dashboard has been developed through earlier phases and includes an existing analytics environment, integrated data sources, and established data structures.

The intention of this consultancy is not to design or implement a system from scratch, but to build on and enhance the current environment.

The consultant is expected to:

- Review and validate the existing data architecture, including current data integration approaches and underlying data structures

- Identify opportunities to strengthen and expand data integration, including the use of APIs where appropriate
- Propose and implement improvements to data governance, access controls, and user permissions
- Develop dashboard solutions that leverage the existing data environment (e.g. data lake or equivalent structure), or propose alternative approaches only where there is a clear and justified advantage

Any recommendations for significant architectural changes should be clearly justified, taking into account feasibility, cost, scalability, and alignment with IPPF's existing systems and capacities.

The consultant will undertake the following components:

| <b>Component</b>   | <b>Description</b>   | <b>Key Deliverable(s)</b>                 |
|--|--|---|
| <b>1. Inception and Implementation Planning</b>          | Review the Functional Specification and validate the proposed technical approach in line with the existing dashboard architecture. This includes confirming dependencies, risks, integration requirements, and opportunities to strengthen the current environment. Finalise the implementation plan, including approach to data integration, governance, and dashboard development.   | Implementation Plan and Workplan          |
| <b>2. Data Integration and Environment Strengthening</b> | Review and validate the existing data architecture and integration approaches. Strengthen and expand data integration across systems where required (including use of APIs where appropriate), validate indicator definitions and data structures, and address key data quality issues. Ensure the data environment is prepared and optimised for dashboard development.   | Integrated and Validated Data Environment |
| <b>3. Dashboard Development, Testing and Iteration</b>   | Develop and configure dashboard views, visualisations, navigation, and role-based access structures within the existing analytics environment. Ensure alignment with agreed governance and access controls, and implement multilingual interface considerations. Conduct user testing with selected stakeholders and iteratively refine the dashboard based on feedback, usability, performance, and data presentation improvements. | Tested and Refined Dashboard              |
| <b>4. Deployment and Documentation</b>                   | Finalise and deploy the dashboard within the existing environment. Prepare technical documentation and user guidance materials, and ensure the solution is aligned with IPPF's systems, governance structures, and long-term sustainability considerations.  | Operational Dashboard and Documentation   |

### **Part 3: Rollout, Training and Adoption (Indicative Timeline: 6–8 weeks)**

The consultancy will also include the design and delivery of a structured training and rollout approach to support adoption across IPPF Affiliates. This will include a Training of Trainers (ToT) model to enable Affiliate-led capacity building, as well as the development of practical training materials and onboarding support. Part 3 will focus on enabling sustained adoption and effective use of the dashboard across Affiliates.

Key activities will include:

- Preparation of training materials, user guides, and onboarding resources tailored to different user roles, with materials hosted—where appropriate—on the IPPF Academy (Moodle) and the MA Forum (internal knowledge and communications hub)
- Design and delivery of a structured onboarding approach for Affiliates, ensuring consistent introduction to the dashboard and its functionality. Design and implementation of a Training of Trainers (ToT) model, including definition of roles and competencies for Affiliate focal points, and equipping nominated representatives to lead ongoing training and peer support within their contexts. Delivery of ToT sessions for designated Affiliate representatives
- Provision of structured support during the initial adoption period, including troubleshooting and responding to user queries
- Collection and synthesis of user feedback during rollout, and recommendation of adjustments to improve usability and adoption
- Refinement of training materials and onboarding approaches based on early user experience

The consultant will be expected to support early-stage adoption by:

- Enabling Affiliates to confidently navigate and use the dashboard for decision-making
- Identifying and addressing common user challenges during initial rollout
- Supporting the establishment of feedback loops to inform ongoing improvements

The consultant should propose a practical and scalable approach to training and adoption that ensures the dashboard is not only launched but actively used and embedded within Affiliate workflows, taking into account the size and diversity of the Federation (150+ countries).

## Management and Reporting Arrangements

The consultant will work closely with the IPPF Secretariat teams responsible for the Dashboard initiative, under the overall coordination of the Performance, Learning, and Impact (PLI) team.

The consultant will be expected to:

- Work in close collaboration with relevant Secretariat teams, including MA Dashboard Development Team (MADDT), Performance Learning and Impact (PLI), IT, and other technical focal points
- Participate in regular check-in meetings to review progress across all parts of the assignment and validate emerging findings
- Present interim findings, dashboard prototypes, and draft outputs for feedback at key stages of the assignment
- Incorporate feedback from designated reviewers prior to finalising deliverables
- Facilitate structured validation of key outputs, including user needs, dashboard functionality, and user experience, with a selected group of Affiliates and stakeholders
- Support coordination across technical and non-technical teams to ensure alignment on implementation, testing, and rollout activities

Key deliverables will be reviewed and approved by the designated IPPF project lead, in consultation with relevant internal stakeholders.

IPPF will facilitate access to relevant documentation, systems, and stakeholders necessary for the completion of the assignment.

# Required Expertise

IPPF is seeking a consultancy team with demonstrated experience in designing, developing, and implementing data dashboards and user-centred data systems within complex organisational environments.

The consultancy team should have the following qualifications and experience:

- Proven experience delivering end-to-end dashboard or analytics platform projects, including stakeholder consultation, needs assessment, system design, development, testing, and rollout
- Strong technical expertise in data visualisation and dashboard platforms (e.g. Power BI or similar), and experience working with integrated data environments that combine multiple data sources (e.g. programmatic, financial, and governance data)
- Experience with data integration approaches, including APIs and data pipelines, and an understanding of data quality, validation, and standardisation challenges
- Experience designing user-centred solutions, including user journeys, information architecture, and intuitive dashboard interfaces
- Experience implementing data governance and role-based access controls, particularly in environments involving sensitive or comparative data
- Experience working with international, federated organisations or multi-country programmes, and ability to operate effectively across diverse stakeholder groups and contexts
- Understanding of data used within health service-providing organisations, including service delivery indicators and operational realities (e.g. SRHR or similar sectors)
- Experience supporting multilingual or localised digital platforms
- Demonstrated ability to design and deliver practical, scalable training and adoption approaches (e.g. Training of Trainers models)

Individual consultants are welcome to apply; however, proposals should demonstrate access to the full range of expertise required to deliver this assignment.

## Proposal Submission Requirements

Interested service provider(s) should submit one technical proposal and one financial proposal for this consultancy. Proposals must be submitted to [dmasara@ippf.org](mailto:dmasara@ippf.org) and copied to [RSingh@ippf.org](mailto:RSingh@ippf.org) with the subject line: **"Proposal for IPPF Dashboard Consultancy – Phase 4: Affiliate Dashboard (Needs Analysis, Development and Deployment)"**

**Deadline for Proposal Submission:** 12 June 2026

### Timeline for Clarifications and Proposal Development

- Deadline for submission of clarification questions: **22 May 2026**
- IPPF response to clarification questions: **29 May 2026 (responses will be shared with all bidders)**
- Proposal submission deadline: **12 June 2026**

Bidders may apply individually or as a consortium where complementary expertise is required. In the case of a consortium:

- The lead organisation must be clearly identified and will be held responsible for the delivery of the project (end-to-end)
- Roles and responsibilities across consortium members must be clearly defined



|                            |                                |                               |  |  |                      |                        |  |
|----------------------------|--------------------------------|-------------------------------|--|--|----------------------|------------------------|--|
| <b>Manager, Developer)</b> | <b>(e.g. Senior, 8+ years)</b> | <b>Analysis, Development)</b> |  |  | <b>Excluding VAT</b> | <b>applicable rate</b> |  |
|                            |                                |                               |  |  |                      |                        |  |
| <b>TOTAL</b>               |                                |                               |  |  |                      |                        |  |

Please confirm:

- I am:
  - a VAT/ GST/ other payer (if any) and my relevant number is: \_\_\_\_\_
  - not a VAT/ GST/ Other taxpayer (if any).

## Selection Criteria

Proposals will be evaluated based on a combined technical and financial assessment.

### 1. Technical Evaluation (100%)

Technical proposals will be evaluated based on the following criteria:

| <b>Criteria</b>                          | <b>Description</b>  | <b>Weight</b> |
|--|---|---------------|
| <b>Relevant Experience</b>               | Demonstrated experience designing and implementing dashboards, analytics platforms, or similar data systems that support organisational decision-making. Experience working with federated organisations or international NGOs is an advantage. | 25%           |
| <b>Proposed Methodology and Approach</b> | Quality, clarity, and feasibility of the proposed methodology across all phases, including stakeholder consultations, use-case definition, dashboard development, testing, and rollout.   | 25%           |
| <b>Team Expertise</b>                    | Qualifications and experience of the proposed consultant(s), including expertise in data analytics, dashboard design, user-centred design, governance frameworks, and implementation.   | 20%           |
| <b>Training and Rollout Approach</b>     | Strength and practicality of the proposed approach to training, including Training of Trainers (ToT), onboarding, and support for adoption across a large and diverse Federation.   | 30%           |

### 2. Financial Evaluation (100%)

Financial proposals will be evaluated based on cost-competitiveness.

- The lowest-priced compliant proposal will receive the maximum financial score
- Other proposals will be scored proportionally relative to the lowest bid

### 3. Final Score

**Final Score = Technical Score (70%) + Financial Score (30%)**

IPPF will invite shortlisted candidates for a follow-up discussion or clarification before making the final selection.