

# TERMS OF REFERENCE FOR THE DEVELOPMENT OF A PERFORMANCE MANAGEMENT INFORMATION SYSTEM (PMIS)

## 1. BACKGROUND TO THE ASSIGNMENT

CEHURD would like to establish a customized and functional Performance Management Information System (PMIS) to enable the organization have a central system for all data, including programme/project specific data. The system is expected to meet the multifaced data needs of CEHURD, and its key stakeholders. The system is expected to aggregate results from different projects and their contribution to the strategic plan as well as aggregate learning from different projects to guide in implementation, the strategic development of new projects and funding opportunities. The PMIS will support in tracking implementation and performance against CEHURD's five-year strategic plan and projects. The system aims at tracking the organization's performance consistently and systematically, and to avail data which would support decision making, planning accountability, learning and ongoing quality improvement.

CEHURD is therefore seeking the services of a supplier to facilitate the development of the PMIS based on its specific information and data needs.

## 2. THE OVERALL AIM AND OBJECTIVES OF THE ASSIGNMENT

### 2.1 Overall aim of the assignment

To design a customized Performance Management information system (PMIS) that is based on the information and data needs of CEHURD.

### 2.2 Specific objectives

1. To assess the information and data needs of CEHURD. This includes technical support towards the review of its existing Monitoring and Evaluation framework and defining custom indicators and targets for use in measuring institutional performance against the 5-year strategic plan.
2. To define system hardware, software and human ware requirements (hosting, cloud based, maintenance, upgrades, cloud storage space, offline/online, remote accessibility), install, test and deploy the final performance management information system based on the defined information.
3. To develop metadata standards and interface including appropriate data flow system.
4. To develop user documents including manuals for the developed Performance Management Information System.
5. To build CEHURD's staff capacity to use the system.

### 3. SPECIFICATION OF THE DESIRED PERFORMANCE MANAGEMENT INFORMATION SYSTEM

The supplier will proactively engage all relevant staff to develop a comprehensive and integrated performance management information system (PMIS) based on the identified needs of CEHURD. The system should;

1. Be efficient and customized for CEHURD to provided real time reports to meet the different needs of the organization.
2. Have a user friendly interface i.e. easy to learn and to use, even by staff without 'expert' computer skills.
3. Integrate Planning Monitoring Evaluation & Learning (PMEL) framework of the strategic plan (2020- 2024) to track performance against the strategic plan (including implementation of annual work plans and performance against indicators). Therefore, the system should keep track of the implementation of the institutional operational plan and indicator performance tracking throughout the life of the strategic plan and provide reports according to specific reporting needs and periods.
4. Enable tracking of performance of specific projects and programmes against set objectives and targets and their contribution to the achievement of the strategic plan. In other words, the system should also provide performance of individual projects including rating of individual project performance and initiate alerts when projects are behind schedule. Provide an option for documenting details about projects to enable easy access when needed.
5. Monitor donor reporting dates and initiate alerts when the due dates are approaching or when a report is submitted.
6. Keep track of both quantitative and qualitative data indicators like cascading results / milestones that contribute to specific qualitative indicators. In addition, provide details of performance of every custom indicator and project based indicators. This will inform the extraction of periodic performance reports to inform decision making.
7. Enable sorting custom strategic plan indicators, but also to provide a report depicting all indicators across individual projects. There should be an alternative to avoid double entry of data. In that case whatever data is entered under project(s) should be reflected under the operational plan implementation and indicator performance for the strategic plan.
8. Have a mechanism to ensure the system is reliable and consistent, to avoid failing during operation (system uptime and reduce down times).
9. Should be scalable or easy to upgrade to accommodate increase in the number of users/new staff but also new projects.
10. Should generate reports for different purposes, including donor and management reports. Flexible and easily upgradable with future software upgrades.
11. Simultaneously used by multiple users across the network.

12. Have dashboards / generate automatic dash boards for project progress, program progress on work plans and indicators.

### **Other features:**

The system should be;

- Internally controlled by CEHURD.
- Be hosted on CEHURD application server.
- Have an automated backup feature.
- Be able to run on different platforms such as Android, iOS and Windows.
- Support offline data/information entry with automatic synchronizing.
- Allow connectivity off CEHURD local area network.
- Of high integrity, not to affect other installed software that runs other systems at CEHURD.
- Make effective use of the storage space and execute commands as per desired timing requirements.
- Ensure security and should not have ill effects to the data entered.
- Have metadata standards definition and implementation which shall include but not limited to the following key components;
  - i) Data attributes, which identify technical specifications and parameters that inform how a piece of data is designed and generated within an information system.
  - ii) Metadata around data management, which conveys information about data meaning, availability, limitations, calculation, purpose, owner, steward, data source and target (operational), time parameter, access permissions, and security.
  - iii) Metadata around data analysis, reporting and use, focusing on data quality.

## **4. SCOPE OF WORK**

The assignment will be undertaken in three major phases as described below:

### **4.1. PHASE 1: Planning and Initiation**

Under this phase, two main tasks will be accomplished;

1. Conduct an assessment of information and data needs of CEHURD to inform the design of the PMIS. This will cover programmatic, ICT related and other important needs.
2. Working with the staff, review CEHURD'S results framework and guide on appropriate custom indicators and targets for the strategic objectives of the organization. These will inform the data/ information needs of the system.

## **4.2. PHASE 2: System development**

This will involve development of the system prototype and presenting it to staff for validation. The supplier will be required to incorporate the feedback from the validation into the final system.

The supplier will provide regular updates on the progress of the assignment virtually through appropriate online communication software. This will enable CEHURD to provide real time feedback on the progress assignment.

## **4.3. PHASE 3: Deployment, system user training, reporting and closeout**

The suppliers will install the developed system including the hardware components with CEHURD's premises.

The supplier will provide system setup, software code and passwords to CEHURD.

At this phase, CEHURD will require the supplier to provide 30 working days of the testing period for the system.

## **5. TIME FRAME**

The assignment is expected to be executed from April to June 2021 including testing and operationalization.

## **6. DELIVERABLES OF THE ASSIGNMENT**

The deliverables for this system will be as defined under the earlier defined phases in section 5 of these TORs. For each phase of the assignment, the specific deliverables are outlined below:

### **6.1. PHASE 1: Initiation and planning**

- i) A report of CEHURD's information and data needs that is reviewed and approved by CEHURD.
- ii) Revised Monitoring and Evaluation framework for the strategic plan with revised custom indicators and targets.
- iii) Inception report of the assignment.

### **6.2. PHASE 2: Systems development**

- 1. System prototype
- 2. Systems setup incorporating feedback from staff.

### **6.3. PHASE 3: Deployment, System user training, reporting and Closeout**

- 1. PMIS Source Code for each module in one central development environment, front and back end documentation.
- 2. Passwords provided to relevant staff.
- 3. User guides, manuals and any other reference materials for the system.
- 4. Train CEHURD staff on how to use the system including maintenance, access and privilege controls.



5. Staff oriented on the user guides and manuals and the whole system.
6. Final report of the assignment, clearly highlighting;
  - The tasks undertaken under the different phases of assignment.  
Systems maintenance, management, data backup, security control, system upgrade and
  - other technical support that will be offered by the supplier.
  - Describe potential risks for the system and mitigation measures.
  - The challenges experienced in undertaking the assignment and how they were addressed.
7. PMIS maintenance services; CEHURD will maintain the PMIS and the supplier will support CEHURD to upgrade as necessary, including providing troubleshooting services. This will include modifying the existing components of the management systems and their reporting modules. This service will be required on an on-going basis in the first year (12 months) after installation of the system, every time the flaws are detected. Please take note that, this will be part of terms of reference and no new arrangements are expected.

## **7. KEY CONTACTS**

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