

# Expression of Interest (EOI) & Request for Proposal (RFP)

*for*

## Development & Designing of a Programme Management System (PMS)

Invitation for Expression of Interest (EOI) for empanelment of a Software Development Agency for Development & Designing of a Programme Management System (PMS)

### BACKGROUND

Centre for microFinance (CmF), Jaipur ([www.cmfrj.org](http://www.cmfrj.org)) is a resource organization working in Rajasthan since 2007 to catalyse the growth of community based microfinance and livelihoods sector in the state. It works with multiple stakeholders such as government programmes, non-government organizations (NGOs), banks, community organizations (especially Self-Help Groups and SHG Federations) and donors to enhance the quality of life of the poor in Rajasthan. CmF is also the nodal agency of the TATA TRUSTS for Rajasthan and is responsible for quality implementation of TRUSTS' supported projects.

CmF along with TATA TRUSTS and Govt. of Rajasthan (GoR) in 2015 had launched a multi-thematic five-year development programme in South Rajasthan titled 'Transformation Initiative', the TI programme seeks to demonstrate proof of concept of transformational change in the quality of life of 3.5 lakh individuals of 70,000 tribal households in 4 blocks of South Rajasthan through integration of livelihoods, microfinance, education, nutrition, drinking water and sanitation interventions.

It is therefore important to make an effective planning for implementation of such activities and develop appropriate mechanism for their evaluation and continuous monitoring.

### ABOUT THE ASSIGNMENT

Centre For microfinance (CmF) invites EOI from experienced Software Development Organization/Firm with expertise in software development for developing online and offline Programme Management System (PMS) for capturing broad indicators of different themes such as microfinance, livelihoods, Education, Health & Nutrition, WASH, Skills etc. of Transformation Initiative (TI) Project and other programme related data in electronic form with options for detailed analysed report generation.

The software will act as a powerful information collection, monitoring, evaluation and decision support tool for CmF. Users will access the software over web, after getting the required authentication from the authority, for performing the required functions.

Particulars	Details
Project Title	Development & Designing of a Programme Management System (PMS)
Project Duration	Although the agency shall be appointed for a maximum period of 3 months (Jan – Mar, 2018) but it would provide technical support up to the project period i.e. up to March, 2020.
Overall Goal and objective of the PMS	The Programme Management Software is to facilitate easier monitoring of livelihood and other project interventions at partner and CmF level for decision making and support as well as to monitor the project related activities

	<p>in detail.</p> <p>Following objectives should also be met through online system development for programme management:</p> <ul style="list-style-type: none"> <li>(i) Capture existing Annual Work Plan of current financial year (Annual Work Plan), physical and financial targets monthly, quarterly and on yearly basis.</li> <li>(ii) Summarize the progress update of physical and financial activities done under different intervention by partner agencies of TI – Project as per the plan on monthly, quarterly and yearly basis of all the indicators for reviewing the progress of the project.</li> <li>(iii) One click analysis report should be generated on monthly, quarterly and yearly basis to have the overall glimpse of target v/s. achievements on major indicators.</li> <li>(iv) Option to submit various narrative reports thorough the online portal and</li> <li>(v) Capture the Household wise Intervention details in brief.</li> <li>(vi) Tracking of all kind of reports for timely submission.</li> <li>(vii) Sharing of Email and/or SMS based status of reports submission with all the stakeholders.</li> </ul>
<p>Technical Requirements for the Software</p>	<p>The proposed portal should contain the following technical requirements or the following functionalities:</p> <ul style="list-style-type: none"> <li>(viii) All the required functions of Information, Communication and Technology (ICT) should be available through the portal. Services and hosting, upkeep and maintenance will be the responsibility of the software development agency.</li> <li>(ix) Ensure compatibility to all the Desktop and Mobile Based Web Browsers with online and offline data syncing feature.</li> <li>(x) Software should be scalable and upgradeable as and when the number of users, activities and contents increases.</li> <li>(xi) Maintain and ensure that the portal (software) supports maximum users.</li> <li>(xii) Images, Graphs, Maps and other content customization features should be available so as to present graphical presentation of the data collected from different partner agencies.</li> </ul>
<p>Indicative Reports to be Generated from the PMS</p>	<p>To keep track the record of the problems/solutions various reports to be generated by the Programme Management System (PMS):</p> <ul style="list-style-type: none"> <li>(i) Analytical, Progressive, Status, Graphical and other miscellaneous reports should be generated from the Programme Management System (PMS) for the TI - Project.</li> <li>(ii) Category wise report of different intervention under TI - Project for different partner agency on Monthly/Quarterly/Half yearly and yearly basis.</li> <li>(iii) A collated report of different intervention under TI – Project for different partner agency on Monthly/Quarterly/Half yearly and yearly basis.</li> <li>(iv) An analysis report of all the partner agencies differently as well as a combined report showing the gaps in target vs. achievement on Monthly/Quarterly/Half yearly and yearly basis for a particular</li> </ul>

	<p>month/Financial year/ Project cycle.</p> <p>(v) One click analysis report for assessing the performance of the project for whole project cycle.</p>
Indicative Functionalities of PMS	<p>The programme management system will have the following system and functionalities:</p> <p>(i) Submission of Narrative Reports– Yearly, Quarterly and Monthly.</p> <p>(ii) Intervention wise vs Household wise details of beneficiaries.</p> <p>(iii) One click progress analysis reports – Yearly, Quarterly and Monthly.</p> <p>(iv) Export all kind of data in MS Excel, Word and PDF file formats (printable version).</p> <p>(v) Due/Awaited/Submitted Reports Calendar.</p> <p>(vi) Automated Email/SMS reminder system for status sharing.</p> <p>(vii) Two step data authentication system/ Cross verification mechanism (by data entry operator and manager).</p> <p>(viii) Checks and balances to be kept for tracking the wrong input of data (pop-ups blink if wrong data entered).</p> <p>(ix) Narrative Report submission option.</p> <p>(x) Any kind of Meeting schedule.</p> <p>(xi) Dashboard for all kind of stakeholders with current outreach and status.</p>
List of Key Deliverables	<p>(i) To study the existing excel based MIS of TI – Project designed by CmF. Develop and design an online/offline portal (software) for analysing the data in a systematic way with necessary changes required.</p> <p>(ii) Designing and development of modern, web enabled, comprehensive online/offline portal to provide accessibility for realistic data collection, monitoring, evaluation and decision making of project activities under CmF.</p> <p>(iii) Implement the approved design of the portal after finalization, initially on pilot basis for one partner and then expanding it to others after necessary changes being done by the software development agency if required.</p> <p>(iv) Installing and operationalizing the approved online portal (software) for all the partners working at different locations.</p> <p>(v) Provide technical support and training to CmF and partner agency officials for use, and ensure the operations of the portal (software) management up to the project period i.e. March, 2020.</p> <p>(vi) Maintain time series data and ensure the backup of all data &amp; services so that certain information is not lost with passage of time and repeated updating.</p>
Reference Documents	<p>Following documents for your reference can be <a href="#">download from here</a>:</p> <p>(i) Sample of Excel Based MIS Template</p> <p>(ii) Sample of Quarterly Narrative Report Template</p> <p>(iii) Sample of Household details</p>
Co-ordination Point	The direct point of contact from CmF will be Vazida Ansari for the same.
Consultancy Fees/ Payment	<p>The payments for the agency/firms selected will be done in different instalments depending upon the completion of work within the time frame.</p> <p><b>Note</b> – The fee is subject to tax deduction at source as per IT rules. GST,</p>

	if applicable will be additional.
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## PRE-QUALIFICATION CRITERIA FOR SUBMITTING THE PROPOSALS

Software Development Agencies are expected to meet the following prequalification criteria. Agencies failing to either meet these criteria or not furnishing the requisite supporting documents / documentary evidence will not be considered for empanelment.

#	Eligibility Criteria	Supporting Required
1.	The applicant shall be a single entity, registered as a Company, Firm or Society under respective acts in India & should have been in existence in India for the last five years	Registration Certificate
2.	The vendor must be registered in India with appropriate tax and other administrative authorities.	PAN Card/GST Registration.
3.	Experience of similar project in multi-thematic areas like agriculture, education, health, WASH, Microfinance etc.	Copy of the work order and letter of successful completion from the client. (Audited Copy)
4.	The applicant should have executed at least one relevant project.	Copy of work order
5.	The applicant should furnish an undertaking to the effect that the firm has not been blacklisted in India.	Letter of self-undertaking.
6.	The agency should have technically qualified and well-experienced staff for resolving the technical issues.	Details of key resource persons available, who are expected to involved in this project.

## HOW TO SUBMIT PROPOSAL/BIDS

Proposals are invited from interested agencies for the above assignment and the last date for receiving this is 20<sup>th</sup> January, 2018 by 4:00 PM at [cmf@cmfraj.org](mailto:cmf@cmfraj.org). Proposal received after the prescribed deadline will not be considered.

While submitting the proposal, please make sure you write “*Bids for the Development & Designing of a Programme Management System (PMS)*” in the subject line.

You are requested to kindly submit the proposal in 2 files separately (i) Financial Bid & (ii) Technical Bid, respectively in PDF/DOCX/DOC file format.

Please attach the above things mentioned in the prequalification requirement.

For any queries related to the proposal, you may contact Vazida Ansari at 0141-4025909 within the deadline.