



Request For Proposal (RFP) For Project Monitoring Information System (PMIS)

Issued by:

**Central Tibetan Administration (CTA)
Department of Finance - Social and Resources Development Fund (SARD)**

Issue Date: 30th September 2024

Proposal Due Date: 5 pm, 1st November 2024

1. Introduction

The Central Tibetan Administration (CTA) through the Department of Finance – Social and Resources Development Fund (SARD), invites proposals from qualified vendors for the development of a **Project Monitoring Information System (PMIS)**. This system will be used to monitor and track various projects implemented by CTA's departments across different locations.

SARD is planning to develop an in-house Program Management Information System (PMIS) for CTA. The PMIS will serve as a unified platform, enhancing collaboration, providing real-time updates on project progress, supporting data-driven decision-making, improving communication, optimizing resource allocation, and facilitating effective documentation and task management.

At this stage, SARD has a general idea of the system's objectives but has yet to finalize specific features or the exact architecture of the PMIS. Therefore, this **Request for Proposal (RFP)** is being issued to gather inputs, ideas, and proposed solutions from vendors. After reviewing these proposals, we will issue a formal **Request for Quotation (RFQ)** with the finalized requirements. Vendors who respond to this RFP, as well as other potential vendors, will be eligible to participate in the RFQ process.

2. Background

SARD is a non-profit organization founded in 1997 by the Central Tibetan Administration (CTA), headquartered in Dharamshala, Himachal Pradesh to mobilize resources and support development initiatives for Tibetans in exile. SARD operates across a wide range of development sectors, including agriculture, arts and culture, capacity building, democracy and human rights, education, entrepreneurship, health, leadership development, livelihood and skills training, and women's empowerment. It serves as the central agency for coordinating development aid provided by governments, institutions, and individual donors.

This initiative of developing a Program Management Information System (PMIS) is a part of the Central Tibetan Administration-Capacity Building and Sustainability Initiative (CTA-CBSI) funded by the USAID through NDI.

It aims to enhance leadership, planning, and management systems within the CTA. The overarching goal of this program is to strengthen the CTA to be more effective and sustainable in delivering services to Tibetans and achieving community self-reliance.

3. Objective

The objective of the PMIS is to:

- Provide centralized project tracking and management across departments such as Health, Education, Finance, and Home etc.
- Enable field officers in remote locations to enter and update project data offline and synchronize the information when connected to the internet.
- Streamline the approval process with an approval matrix for project stages at different departmental levels.
- Provide a user-friendly interface that accommodates non-tech-savvy staff, most of whom are familiar with Excel spreadsheets.

4. Purpose of this RFP

This RFP aims to gather proposed solutions, ideas, and approaches from vendors on how to best implement a PMIS that meets the above objectives.

This RFP is **not a request for final quotes or detailed specifications**, but rather an opportunity for vendors to present high-level concepts, system architecture ideas, and project management solutions. Vendors should include suggestions on:

- How the system should function to meet the objectives.
- Recommendations for the system's architecture (web-based, desktop, hybrid).
- Suggestions for features that would benefit CTA's decentralized operations and improve user adoption.

Please Note: Following the evaluation of proposals submitted in response to this RFP, SARD will issue a more detailed RFQ. This RFQ will include refined and finalized system requirements based on the insights and feedback gathered from the RFP stage. The RFQ will be sent to vendors who responded to this RFP, as well as other potential vendors, approximately **two weeks after the RFP submission deadline**.

5. Scope of RFP Responses

At this stage, the scope of vendor proposals should include:

1. System Concept and Architecture

- 1.1.A high-level system architecture proposal (e.g., web-based, desktop, or hybrid).
- 1.2.Suggestions for offline functionality to support data entry at remote locations.
- 1.3.General thoughts on database structure and data synchronization.

2. Features and Functionality

- 2.1.Recommendations on core features of the PMIS.
- 2.2.Ideas on an approval matrix to streamline project approvals at various departmental levels.
- 2.3.Suggestions on user interfaces for non-tech-savvy staff.
- 2.4.Ideas for **dashboards** and **reporting** functionality.

3. Implementation Approach

- 3.1.High-level project plan, including key phases (e.g., prototyping, development, testing, and deployment).
- 3.2.Prototype development and feedback loop: how to build a system that allows for real-world user testing before final deployment.

4. Training and Support

- 4.1.Thoughts on how training can be provided for users with limited technical skills.
- 4.2.Support strategy post-deployment for ongoing updates and issue resolution.

5. Budget

- 5.1.Approximate estimated amounts in INR or USD for the proposal (Preferred INR)

6. Preliminary Feature Requirements

To guide vendors in understanding the type of system we envision, the following are the key features we expect the PMIS to include. Please note that these requirements are preliminary and may evolve after reviewing vendor proposals:

1. Project Tracking and Monitoring

- 1.1.Ability to track the status of projects across departments and locations (e.g., Health, Education, Finance, and Home, head office and branch).
- 1.2.Overview dashboards for project status, progress reports, and key performance indicators (KPIs).
- 1.3.Real-time and historical data tracking to monitor project timelines, budgets, and milestones.

2. Data Entry and Synchronization

- 2.1.A simple and intuitive interface for data entry, particularly for non-tech-savvy staff.
- 2.2.Offline data entry functionality at remote locations, with data synchronization when internet access is available.
- 2.3.Ability to import/export data from/to Excel spreadsheets.

3. Approval Workflow

- 3.1.Creation & submission of Proposals in Templates (internal, donor)
- 3.2.A multi-level approval matrix for project approvals within/across different departments.
- 3.3.Tracking of project approval status at each stage (e.g., submitted, pending approval, approved, or rejected).
- 3.4.Notifications and reminders for pending approvals.

4. Comments and Notifications

- 4.1.Ability for higher management or department heads to comment on project progress directly within the system.
- 4.2.Automatic notifications triggered by comments, approvals, or changes, sent to relevant personnel (e.g., project officers, managers, or anyone related to the project).
- 4.3.Notification channels could include email alerts and in-system notifications.

5. Reporting and Analytics

- 5.1.Customizable reports based on department, project type, timeline, donor and other parameters.
- 5.2.Generation of monthly, quarterly, and annual project reports.
- 5.3.Visual representations of data, such as charts and graphs, for performance analysis.

6. User Roles and Permissions

- 6.1.Role-based access control, allowing different levels of access based on user roles (e.g., project managers, department heads, administrators).
- 6.2.Security measures to ensure data integrity and prevent unauthorized access.

7. Scalability and Integration

- 7.1.The system should be scalable to handle the growth of projects and the increasing number of users over time.
- 7.2.Capability to integrate additional features or modules in the future, such as financial tracking.
- 7.3.Integration with Existing Systems: The PMIS should have the flexibility to integrate with other existing systems used by CTA, such as our current budget management system or other financial tools.
- 7.4.The system should support standard data exchange formats (e.g., APIs) to ensure seamless integration with third-party applications or internal systems.

8. Centralized Database

- 8.1.The system should feature a centralized database hosted at the headquarters, ensuring all project data from various departments and remote locations are consolidated in one place.
- 8.2.The centralized database should allow for easy retrieval, storage, and management of project data.
- 8.3.Remote offices should be able to input data into the system, with automatic synchronization to the central database once connected to the internet.

9. Security Features

- 9.1.Data Encryption: All data stored and transmitted should be encrypted to ensure confidentiality and prevent unauthorized access.
- 9.2.Authentication and Authorization: Implementation of multi-factor authentication (MFA) for system access and role-based access controls.
- 9.3.Audit Trails: All actions within the system (e.g., data entries, approvals, comments) should be logged with timestamps to provide an audit trail for accountability.
- 9.4.Regular Security Updates: The system should support regular security patches and updates to address vulnerabilities.
- 9.5.Backup and Recovery: Regular automatic backups of the system should be performed, with clear procedures for data recovery in case of data loss or corruption.

Note: PMIS must be developed using the **Laravel framework** in accordance with our [TCRC Web Application Development Standards](#). A copy of these standards is attached to this RFP for your reference. This ensures that the development process aligns with our organizational standards for security, performance, and maintainability.

7. Timeline

The tentative timeline for this process is as follows:

Milestone	Tentative Date
RFP Release Date	30 th September 2024
RFP Submission Deadline	5 pm, 1 st November 2024
RFQ Release Date	Tentatively two weeks after the RFP submission deadline
RFQ Submission Deadline	Tentatively a month from RFQ Release Date

7. Evaluation Criteria

Proposals received in response to this RFP will be evaluated based on the following criteria:

- **Understanding of Requirements:** How well the vendor demonstrates an understanding of CTA's project tracking needs.
- **Proposed Solution:** The feasibility, innovativeness, and flexibility of the proposed solution.
- **Experience and Expertise:** Vendor experience in developing similar systems, particularly for public sector or non-profit organizations.
- **Scalability:** How scalable and future-proof the proposed solution is for long-term use.

8. Deliverables for RFP Stage

Vendors should submit the following:

1. **Executive Summary:** An overview of the proposed solution and its key components.
2. **Technical Approach:** A description of the proposed system architecture, core features, and approach to offline functionality and synchronization.
3. **Timeline:** A high-level timeline outlining major milestones for system development, including prototype delivery.
4. **References:** At least two references for similar projects completed by the vendor.

9. Next Steps – RFQ

After evaluating the RFP responses and refining the system's requirements and features, a formal Request for Quotation (RFQ) will be issued to all RFP respondents and other qualified vendors. The RFQ will be issued approximately two weeks after the RFP submission deadline.

The RFQ will contain:

- Finalized system requirements and features.
- A request for detailed project timelines and costs.
- Specifics regarding system testing, deployment, and training needs.

10. Submission Guidelines

All RFP responses must be submitted electronically in PDF format by **5pm, 1st November 2024** to sarddata@tibet.net CC to sardfund@tibet.net, sarddirector@tibet.net and wd@tibet.net with a subject line: **PROPOSAL: Request for Proposal no. 01/2024**. Late submissions will not be considered. Please ensure that your proposal is concise and clearly structured.

10. Contact Information

For any questions or clarifications regarding this RFP, please contact:

Tenzin Lodoe

Data & Communication Officer

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Note: This solicitation in no way obliges SARD or its partners to award a contract nor does it commit SARD or its partners to pay any cost incurred in the preparation and submission of a proposal. SARD bears no responsibility for data errors resulting from transmission or conversion processes.

SARD appreciates your responsiveness and looks forward to a mutually beneficial business relationship.

Sincerely yours,

**Lobsang Tenzin,
Director, SARD**