Consolidating the Data Impact Program's Reporting System

Request for Proposal

Summary

The Data for Health Initiative’s Data Impact team is seeking a consultant to support the development of a consolidated reporting platform for the program using Airtable.

Background

The Data for Health Initiative collaborates with 25 participating low- and middle-income city, state and country governments to:

- Strengthen the quality of birth and death registration data, including cause of death data
- Explore innovative approaches to NCDs surveys and surveillance
- Enhance the use of data for maximum impact in policymaking and priority setting

The Data Impact Program (DIP) collaborates with governments to increase utilization of data for the prioritization of health issues, development of policies and programs, monitor impact, and communicate with stakeholders. Technical assistance is provided to develop policy-relevant analytic skills; use information technology to compile, manage, and share data from multiple sources, and present and disseminate data to stakeholders.

The real impact of improved data collection and analysis occurs when government policymakers and program planners use those data to prioritize health issues, develop policies and programs, monitor the impact of public health strategies, and communicate health issues with all stakeholders. The Data Impact Program partners with Ministries of Health and National Statistics Offices in leveraging data from multiple sources for such strategic uses, and in creating systems and a culture in which the use of data is prominent throughout ministry activities.

Monthly reporting, and the tracking of indicators have evolved considerably for DIP since the start of the Data for Health Initiative in 2016. The evolution of the program has led to the creation of several different reporting forms and trackers developed with Excel, Word, Power BI and Smartsheet. The main way the DIP team documents their updates and progress against indicators is through the Monthly Reporting tool in Excel that gets uploaded to Power BI monthly.

Currently, there are reporting tools and trackers that cover the universe of DIP’s indicators, progress and information for the program. However, the use of different tools and software, the act of housing this information in different locations, and the manual nature of
reporting has led to a number of challenges including: 1) staff forget to use and update tools that are not part of the main reporting form (ex: Smartsheet trackers), 2) it can be difficult to find and keep track of the various tools, 3) there is some duplication in reporting, 4) the reporting burden is high, 5) opportunities to communicate successes are potentially missed, and 6) a high amount of manual work is created and distributed across the team.

**Objective:** DIP is embarking on a process to evaluate and select a new management software to become the DIP M&E and Reporting Platform to house or link to the various tools and information for reporting and M&E for the team.

**Scope of work**

Working closely with the Deputy Director, Director, and Program Officer of DIP along with other members of the team, the consultant will address the following needs:

1. **Consolidation:** Consolidate our Country Monthly Updates and M&E Excel tool, Power BI dashboards, vignettes tracking and Communications tracking into Airtable to encompass the following:
   a. **Submission of monthly reports:**
      i. Develop an easy-to-use format for team members to enter and review submitted qualitative updates for 25 countries across their tasks, activities, and objectives submitted every month
         1. Develop a template that can be populated with the country name, objectives, activities, tasks, and anticipated end dates.
         2. The template should allow for edits to be made during the reporting period without loss of information.
         3. The template should be used to generate a format for monthly reporting, which would entail the following:
            a. Provide monthly status of tasks (Not yet started, In progress, Completed, Delayed, Canceled)
            b. Written qualitative updates on the work completed per task and any challenges faced per task.
            c. Submission of qualitative vignettes or stories of 0.5 – 1.5-page length about an outcome or impact that was achieved in that country that month linked to both the country and a vignettes tracker.
            d. Submission of communication updates to be linked to a communications tracker (desirable but not required).
4. Ideally, the format should allow users to easily see a summary of previous monthly reports as they complete the current report.

5. Ideally, the format should have the ability to link to other external tools (ex: Smartsheet trackers) that are managed by other parties where relevant, or it should have the ability to provide reminders about completing external tools where relevant.

6. If possible, the format should provide the ability to have one staff member complete the monthly reports and a second to review and/or edit updates.

ii. Either as part of the main reporting template or separately, develop an easy-to-use format for team members to enter and review submitted quantitative monitoring and evaluation (M&E) indicator information for 25 countries

1. Develop a template that can be populated with the country names, objectives, activities, tasks and multiple output, outcome, and impact indicators per task.

2. The template should allow for edits to be made during the reporting period without loss of information.

3. Submit quantitative data if outputs, outcomes and impacts are achieved in the month.

   a. For indicators, related qualitative information should be collected through pop-ups (ex: # of reports produced would create a pop up for the names of the reports).

4. If the M&E reporting format is separate, there should ideally be a link to the main monthly reporting format, or the main monthly reporting format should have the ability to alert users to complete the M&E form as well.

b. Tracking progress:

   i. Create a tracking dashboard where team members can view their objectives, activities and tasks and track progress for their country in terms of the monthly updates that are submitted and described above.

   1. These monthly reports described above could create country pages, tabs, or workspaces (if possible) where all the submitted information would be housed for each country and
could also feed into other dashboards or summaries (described under Section C Dashboards below).

2. Team members should be able to make minor edits to their tasks and activities as implementation occurs (ex: editing the description of an activity or task such as the name of a workshop or report).

3. Team members should be able to view the history of their reporting when entering monthly updates, for example, being able to see all their previous months of reporting and indicators by month.

4. Team members should see a narrative of how objectives, activities, tasks, and indicators are linked.
   a. For example, the team member could click on an objective and see the activities, tasks and indicators associated with it along with relative progress.

5. Team members should clearly see where they are on track and where they are delayed.

c. **Dashboards:**
   i. Develop global dashboards to be able to see totality of country information and be able to filter by country or region
      1. Dashboards to see the status of objectives and activities using an algorithm provided by the Data Impact team to combine the status of tasks.
      2. Show which countries are behind and for what tasks/activities/indicators for the period and for the quarter.
      3. Dashboards to see what progress has been achieved and where there are delays.
      4. Summary of indicator progress across output, outcome, and impact indicators globally.
         a. Show where new indicators have been achieved for that month and connect to the country, task, and activity.
      5. Additional dashboards that could be helpful as needed.

d. **Alerts:**
   i. Embed alerts into reporting
      1. Create alerts if an activity or task is delayed
      2. Create alerts if something has not yet been updated based on specific rules (example task completed but indicator not updated).
3. Remind team members to update vignettes when an outcome or impact indicator has been achieved
4. Remind team members to report on communications events for that month
5. Remind team members to update trackers if they cannot be integrated with Airtable (ex: Smartsheet).

e. **Permissions:**
   i. Develop ability to control user and viewer access to specific forms, reports, and dashboards
      1. Country leads should have full access to their country pages/tabs/workspaces and be able to make edits
      2. Country coordinators should be able to view the pages and also submit monthly reporting forms
      3. Management team should have access to edit and view everything
      4. Donor should have access to summary dashboards.
   
   ii. Logins
      1. Discuss and make decisions around logins - How can we reduce the number of logins needed to access Airtable?

**Delivery of technical assistance**

The consultant is expected to advise the team as needed for a specified number of hours during and after the launch of the consolidated platform.

**Expected outputs**

1. Develop a mock-up of the consolidated platform;
2. Discuss and revise mock-up of the platform with DIP team to develop a first draft of the platform for testing;
3. Test data entry with one country to assess flow and visualization of information;
4. Make final edits to the platform;
5. Make an implementation plan with DIP in terms of inputting the information across 25 countries to the platform. **If feasible, DIP team can enter the country information once the structure has been created.**

**Qualifications of the consultant**

- Experience developing Airtable platforms for reporting across large globally distributed teams across multiple projects
- Experience with non-profit reporting and monitoring and evaluation is desirable
• Ability to work independently.

• Strong organizational and verbal and written communication skills in English.

Other essential requirements
• Ability to work with various time zones.

• Available to start the consultancy no later than 29 February 2024.

Place and timeline/duration of assignment
• This is a consultant position and deliverables are expected to be completed by 15 May 2024 with the possibility of extension. Contracts are executed and paid in the currency of the country where the consultant is based and payments are tied to deliverables.

Instructions for Respondents
1. Contact Person. Independent contractors shall submit a CV and cover letter to bkiernan@vitalstrategies.org Please use “Consolidating the Data Impact Program’s Reporting System” as subject in your submission. In the cover letter, provide a quote for the total consultancy, including an estimate of the days needed per deliverable and the daily rate. Note any additional information on the proposed solution or other services you provide that you think may benefit this project.

2. Due Date. Interest must be submitted in PDF format by 16 February 2024, 5:00 PM EST.