Terms of reference

LO Norway International Department is in the process of improving tools and systems for monitoring of projects and programs. LO Norway wants to find joint and simplified systems that can easily be used by partner field staff, partner project staff and LO staff to simpler, faster, more cost-effective ways of sharing information and data between partner field offices, central offices and LO, analyze key data to make evidence-based decisions and strategic planning, and improve the overall project and program follow up.

About LO and scope of work

LO is the largest Trade Union organization in Norway, representing more than 970.000 members. LO International Department is working with about 25 trade union partners in about 20 countries in Africa, Asia, Middle East, and Latin America. LO has two program agreements with the Norwegian Agency for Development Cooperation (Norad), one frame agreement (Decent Work, 2019-2023) and one program agreement (Modern Slavery, 2021-2023), where both are implemented by partner organizations. The digital monitoring project is initially aimed at and financed by the former program.

LO International Department have five advisers and two other staff working with project and program management, and four regional consultants who work closely with local partners. LO's role on field level is limited to capacity building and advising, quality assurance, reporting, as well as to facilitate learning and innovation. LO's partner organizations are mainly national trade union confederations with affiliates and many program officers are volunteer shop stewards. The partner organizations vary in size, strength, and capacity. Some have project teams with divided roles and responsibilities, and others have few staff that fills several roles within the project work.

Needs and objectives

LO will over the next years' work to enhance its ability to assess and demonstrate impact, use results to drive decisions, strategy, change, and advocacy, continuously learn and innovate. LO is therefore searching for a provider of user-friendly and cost-efficient digital monitoring where LO can monitor projects with partner organization and partner organizations can monitor with their affiliates, and share information with LO and partners leadership, donors and stakeholders not directly involved in the projects. Digital monitoring tools, systems and structures will be used by LO and partners for the remaining time of the current program period and in the development, implementation, monitoring, evaluation and learning in future programs.

The digital monitoring project aims to improve project monitoring by accessing real-time data through new data collection methods and new types of data, which will improve the information flow between partners field staff, project staff and management, between LO and partners, as well as between LO staff, and externally to donors and for communication. More frequent data collection and improved quality of accessible data ensures more rigor data management and analysis, which again can contribute to more informed decision-making, evidence-based advocacy and agile project planning and development. Moreover, it can improve LO and partners ability to assess and demonstrate impact.

The long-term objectives are to improve partners and LO's learning outcomes, make timely evaluation of our combined efforts, and share information between partners across regions and countries. Combined, these objectives will strengthen LO's and partners capacity to manage projects and programs, monitor and evaluate interventions and trace political processes. Core to these ambitions is to strengthen both LOs *and* partners capacity. That means that systems and tools should not solely address cooperation with LO, but should be relevant, applicable, and fruitful for other aspects of relevant partners' work.

Key objectives:

✓ Improve (real time) data flow between LO and partners
✓ Enhance learning across LO and partner organizations
✓ Streamline routines and gradually reduce time and costs in project and program follow-up
✓ Enhance and make LO's communication, between stakeholders involved in the projects and programs and externally, more efficient.

These objectives answers to three specific project components, with an initial focus on number 1) *data collection and management*, and 2) *data analysis and visualization,* with the possibility of extending the work to component 3) project and program management.

Component 1: Data collection and management

This component answers to the objectives regarding real time monitoring, informed decision-making, and more agile planning of activities, projects, and programs. It addresses data collection in the field, reporting between field and project staff in partner organizations, reporting between partner organizations and LO, as well as providing LO with better data to report to donors. This component is concretely asking for a digital and mobile data collection and reporting tool to be implemented across all LO's Norad-funded projects. Both LO and partners want to make data collection in the field easier and the data accessible for LO and partners through one common data collection and reporting system. Currently, LOs partners are mainly depending on non-digital tools for data collection in addition to social media (What's App and Facebook).

Component 2: Data analysis and visualization

This component answers to the objectives of enhanced communication within LO and partner organizations, externally to donors and in communication work. Moreover, it answers to elements of efficient and effective project and program monitoring, enhance learning across LO and partner organization and make more knowledge-based decisions, advocacy activities and strategies. To achieve these objectives, it is necessary to improve LO's and partners' ability to, in a timely manner, access, analyze and learn from information available, across different data sources. LO will develop an infrastructure of key performance dashboards and –reports, covering both project updates and progress in project implementation, tapping into live databases, as well as integrating analysis across program deliveries and qualitative reports (potentially financial results). Dedicated dashboards and reports will be made available for implementing partners, LOs International Department and will streamline the generation of reports and updates for donors.

Component 3: Project and program management

This component answers to objectives linked to efficient and streamlined project and program management, enhanced learning from project work, and strengthened communication between different stakeholders. LO sees a need to further harmonize and integrate the management of its programs and projects. The organization is therefore seeking to implement a program and project management tool that ensures streamlined program management, which ensures efficient and effective project management for partners project management staff and LO staff.

Approximate number of users at different level

Component	Definition	Access for	Number of users
Component 1	Data collection and management	Partner organization and affiliates (field staff, partner project staff) and LO staff (advisers, regional consultants)	2000 light users, 70 regular users, 15 advanced users
Component 2	Data analysis and visualization	Partner organization and affiliate project staff and LO staff (advisers, regional consultants). communication staff	15 advanced level users, 70 regular users
Component 3	Project and Program management	Partner project staff and LO staff, (advisers, regional consultants) communication staff	15 advanced level users, 70 regular users

The system will be for LO International Department, their consultants, advisers, monitoring and communication staff with up to 25 partner organizations (with the possibility to expand) and the partner affiliates. Approximate up to 70 regular users submitting field reports and/or administering the projects. Up to 20000 light users, submitting frequent but limited data, such as 1-2 indicators via mobile device (component 1 and 2). This will approximately translate to up to 15 people with advanced level training (inc. training of trainers) and up to 70 people with regular training.

Timeline and budget frames

LO International Department is planning for gradual development and expansion of a new digital monitoring system. According to the following *approximate* timeline the selection of supplier(s) will be in Q4 2021, training of LO staff and implementation and development of key features and pilot with selected segments and partners in Q1-3 2022. Roll-out to all partners from Q4 2022. For 2023 we aim to continue the implementation and development by scaling up and adding new segments. The third year, 2024, will be the first year with a full project and program cycle within the new digital monitoring system (with reservation of continued funding for the digital monitoring project depending on its achievements). The overall budget frame for the first three years of the digitalization project is 1-1,5 MNOK (ex. potential travel costs).

Year	What
1	Set-up and implementation, training (piloting 2-4 partners and upscaling)
2	Continued implementation and development, scale-up and trainings
3	First annual project cycle (inc. licenses and support package), potential trainings

General requirements of information regarding the supplier

The supplier is asked to provide the following information with regards to their scope of work and experiences:

1. Clearly specify which of the three components the supplier is providing information for. If covering one or two of the components, please specify solutions that can be integrated with your system. Seamless integration between the three components will be a prerequisite for selecting supplier(s).
2. An overview of ethical guidelines and/or code of conduct.
3. Description of experience working with similar organizations (preferably European and

Scandinavian), and list a of relevant organizations for reference purposes.

4. Short description of the experience working with data security in political sensitive contexts
5. Confirmation of experience working with GDPR and that LO will be the legal owner of all data
6. Describe their approach to training of trainers and different levels of users (advanced, basic, limited) in the implementation phase and follow-up training (if differentiated between components please specify so).
7. Description of support system, availability, and response time
8. Describe the possibility to access and test the system during the selection period
9. Outline a tentative implementation and training plan based on the approximate timeline stated above (the supplier is free to suggest the most beneficial and feasible implementation plan, but preferably prioritizing component 1 and 2)

10. Outline a budget frame for each of the three first years in line with the approximate implementation plan (ex. Travel costs, inc. technical support, training packages), including all applicable taxes and insurances.

Information regarding general technical requirements

The supplier is asked to provide the following information regarding the features, technical requirements, and potential within the digital monitoring system:

1. A general description of the functions and features for each of the three components, particularly important is:
   a. Explanation for data and results aggregation and disaggregation through several layers of reporting (activity level, output level, Intermediate-Outcome level, Higher-Outcome level, and Impact level) and ability to analyze, structure and present information across different data sources.
   b. Specific for component 1 and 2:
      i. Explanation of the ability to systemize collection and submission of quantitative and qualitative data, as well as common format documents and media files (e.g. photo, video).
      ii. Explanation of the ability to set up libraries of standard components that may be used or duplicated as needed, including standard data collection tools and report templates and result indicators.
      iii. Other potential data collection methods (e.g., SMS-based, voice-based, documents, pictures).
   c. Specified for component 2:
      i. Possibility to embed dashboards on relevant LO platforms (Microsoft 365, EPI server web solution etc.).
      ii. Potential to simplify automated generation of standardized reports with key data in common formats (Word, Excel, PDF).
   d. Specific for component 3:
      i. Describe (in short) the systems features for efficient project and program management of the entire project cycle from development, throughout the implementation process and the evaluation and learning stage (inc. risk management, task and timeline management, partner portfolio, delegation of roles and responsibilities etc.).
2. Explanation of storage in database, what kind of database (MySQL or SQL database or similar) and availability for LO and partners.
   a. Preferably information regarding a potential exit strategy for LO and/or partners
3. Explanation of accessibility and use in remote areas with less mobile coverage and internet access
   a. For Component 1: ability to work offline, with online synchronization
4. Description of the potential of different levels of access, control, and ownership (LO staff, partners organization, their affiliates and field staff) specified for each of the components
5. Explanation for possibilities to use multiple languages in the system, information material, in trainings and support (please include a list of languages)

6. The system has a web interface (cloud-based solution)
7. Explanation for the possibility to export data into common file formats (Microsoft and common statistical tools).
8. Description of integration with other LO solutions, particularly Microsoft 365 and Power platform, but also potential to integrate with website, social media, and a financial management system
9. Explanation for use on all common hardware devices (mobile phones, tablets, and computers) and operative systems.
10. Description of flexibility in terms of:
    a. Setup of structure. Possibility to have different models within the system. E.g., LO-Partner-Affiliates-field staff vs. LO-Partner-field staff
    b. Possibility for LO staff and partners to develop, adjust or alter features, forms, structure and set up (please be specific for each component).
    c. Explain potential to store, manage and share documents and media files
11. Elaborate on the possibility for scaling up and down within the system in an efficient and seamless manner (e.g., changing from premium package to medium package or vice versa)

Submission of information

The information submitted should not exceed 10 pages (ex. Appendixes). Eligible candidates are invited to submit their information comprising the following:

1. A company profile including
    a. Brief history/background
    b. Description of competencies and capacity
    c. Ownership and governance structure
    d. Financial key figures, reports for last 3 years
    e. Company ethical guidelines and/or code of conduct
2. Information form (Appendix I) answering specific questions regarding:
    a. the supplier and technical/product solution as stated above in attached form
    b. budget and cost frames based on the requirements stated above
    c. suggestion for implementation based on the information stated above, including methodology and work plan for performing the assignment
3. A simple risk analysis based upon the above technical and operational requirements, and suggested mitigation measures

Information documents in both PDF and an editable MS Office format can be sent to Ida Fagervold, ida.fagervold@lo.no . Any questions regarding this request for information can be directed to the same email address.

Deadline to submit information: October 11, 2021

Tentative timeline for selecting supplier*		
1	22.09.2021	Publish request for information (RFI)
2	11.10.2021	Deadline RFI
3	18.10.2021	Selected 3-5 suppliers for Request for Proposal (RFP)
4	08.11.2021	Deadline RFP
5	09.11.2021-30.11.2021	Test suppliers (2-3 selected from RFP)
6	01.12.2021-10.12.2021	Dialogue suppliers
7	17.12.2021	Supplier selected

Please note that these dates are tentative and does not indicate exact deadlines for feedback and selection of supplier(s).