
TERMS OF REFERENCE



Subject: **Data visualization of project indicator data stored in Salesforce**

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Deadline to submit your proposals: November 13, 2020

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1. Context of the assignment

Rikolto is an international NGO with more than 40 years' experience in partnering farmer organisations and food chain stakeholders across Africa, Asia, Europe and Latin America. Rikolto runs programmes in 16 countries worldwide through seven regional offices. We're a close-knit network of accessible and knowledgeable colleagues, willing to share experience and eager to inspire others. This network of Rikolto offices is supported by a global support team, which fulfils key advisory roles and offers shared services such as finance, monitoring & evaluation, people & organisation, communication and fundraising.

1.1. Rikolto's use of Salesforce

Rikolto has been using Salesforce for two main purposes:

- Customer Relations Management tool; and
- Project database with basic project information and indicators connected to network-wide and region-specific progress reports.

Last year, we conducted an in-depth survey regarding the regional use of Salesforce and missed opportunities. One of the points that came out of this survey was the integration of the project information section with actual project management practices of programme staff.

In response, we have developed a more user-friendly input mechanism for the input of baseline, target and observed values of indicators in the project section. Smooth and accessible visualisation of these data, however, seems not to be possible within the Salesforce environment.

One option suggested by the consultants who have developed the indicator module, was to work with an Excel file connected to our Salesforce database and with multiple pivot tables and respective visualisations. This solution turned out quite user-unfriendly: a very heavy file, lots of customisation effort and additional complications to code the indicator input homogenously.

1.2. Rikolto's project management structure and indicator visualisation needs

The kind of visualisations Rikolto is looking for are not possible within the Salesforce environment. An overview of the **project management structure** and its related indicator data visualisation needs:

- 4 global programmes that cluster country-level projects and have a global project component:
 - Every global programme has a set of common indicators applicable to all country-level projects (but not for all global programmes are all common indicators applicable to all country-level projects).

- ❶ Some global programmes also have indicators connected to global indicator frameworks, with its respective visualisation needs.
- On average, between 50 and 80 country-level projects, most of which are connected to a global cluster programme:
 - ❶ These projects use (some) common indicators as defined by that global cluster programme, and additional project-specific indicators that are not harmonised with any other project.
 - ❶ Every project is structured around 3-5 interventions, which have 3-10 indicators each. The number of interventions and number of indicators per intervention varies for each project.

This project management structure is still under construction, expected to be operational in January 2022. However, the current project management structure includes a limited set of global common indicators, references to a global indicator framework and project-specific indicators. This is reflected in the project indicator section in Salesforce.

An overview of **relevant tags** when inputting a new indicator:

- Indicator grouping [overall project; intervention; global indicator framework]
- Indicator title [free text]
- Indicator measure [unit; percentage; nominal; qualitative]
- Ascending [true; false]
- Disaggregation required [tick box]
 - ❶ Disaggregation category [partner organisation; gender; age; gender & age]
 - ❶ Aggregation rule [sum; average]
- Indicator values [baseline; target; actual]
 - ❶ Start and end dates [no start date for baseline]
 - ❶ Multiple target and actual values per indicator possible

The **input frequency** of indicator values ranges from once per year to once per month. The majority of indicators is updated once or twice per year. There are two modalities applicable to indicators that are updated more than once a year:

- *Cumulative* (e.g. monthly sales figures): monthly/quarterly values are inputted but should have in parallel a cumulative count that is the reference for target and observed values in reports. That is, at cut-off moments for indicator reports, the value corresponding to the cut-off date (e.g. June 30) should not be the monthly value of June (or the value of the second quarter), but the sum of all values inputted up until the cut-off date.
- *Non-cumulative* (e.g. membership counts): values of indicators that can be collected at one or more points in time of a reporting year, with the most recent value superseding the previously recorded value (to ensure that only the most recent value shows in reports).

The information section of the project object includes references to country of implementation, commodity and global programme cluster connection (if applicable).

2. Scope of work

With no solution within the Salesforce environment available that satisfies our visualization needs, Rikolto is looking for a developer who can connect Salesforce data with a user-friendly visualization environment.

2.1. Salesforce connector

Key to the success of this operation is an API connector that can extract the data from Salesforce and structures them in a table with all categories needed for the requested visualization modalities.

To optimize the speed of visualization, it will probably be preferable to extract once per month relevant data from Salesforce on the visualization server.

2.2. Visualisation modalities

Minimal visualization modalities requested at the moment:

- Cluster dashboard
 - Select global cluster programme
 - Visualization of country-values in a comparative manner for
 - Common indicators of global cluster programmes [structured by 3-6 sub-sections]
 - Common indicators of global indicator frameworks
 - Selected countries of the same cluster
 - Progress dashboard that visualizes the % on/off target in 2 modes:
 - Per country for all indicators
 - Per indicator for all countries
 - Export of single or complete dashboard visualizations in jpg/png and pdf
 - Export of single graph or complete dashboard data in Excel
- Project dashboard
 - Select project
 - Visualisation of all indicator target vs actual value per intervention
 - Visualization for the project period [2-5 years] in 1 graph
 - Drill-down option for indicators with disaggregations
 - Automatic adjustment of number of visualizations depending on number of indicators for each intervention
 - Each visualization should include the indicator title and an info object for the legend of qualitative indicators
 - Progress dashboard that visualizes for each intervention the % on/off target of each indicator
 - Export of single or complete dashboard visualizations in jpg/png and pdf
 - Export of single graph or complete dashboard data in Excel

2.3. Users

There are roughly speaking 2 user groups that will access the visualization platform:

- Project implementation staff [50-80 users]: infrequent use – once every 3-6 months
- Management and support staff [30-50 users]: average use – once per month

Both categories would be entitled to the same user rights: view all clusters and projects. [*User rights are tailored on the data input end in Salesforce.*]

Most users are “starter level” in data visualization and analysis. That is why all visuals should be limited to basic analytics and as user-friendly as possible, to incentivise the use of the platform. It is possible that over time, more complex visualization or analysis options can be added to the platform. This will happen upon user requests.

2.4. License

Rikolto looks for a license solution that provides access to the platform for all users. Rikolto already has a company-wide license to O365 (*E5 – which includes PowerBI*).

Given the low usage frequency of most users, it would make little sense to bill for each user individually. Instead, a company-wide license covering approximately 120 users would probably be more adequate.

This licensing modality can be reviewed over time based on user statistics. The general idea is, however, to encourage use without being hampered by inhibitive high user costs (Rikolto is a non-profit organisation).

This license should include access to the platform and basic troubleshooting/maintenance support for the existing visualization environment.

New visualization modalities or features that would fall outside the scope of this basic support shall be billed separately (dependant on approval of the scope of work).

3. Submission of tenders

Interested developers should submit to michaela.boyen@rikolto.org the following information by November 13, 2020:

1. Overview of relevant experience (3-5 similar projects) with links to publicly available results, demo or screenshots of delivered results.
2. Cost overview for each of the following areas of work (as detailed in “Scope of work”):
 - a. Development of Salesforce Connector (one-time cost)
 - b. Development of Cluster and Project Dashboards (one-time cost)
 - c. Company-wide annual license fee (annual cost)
 - d. Daily rate for new developments (upon request after project completion)

Costs should include VAT (if applicable – Rikolto is a foundation of public interest registered in Belgium).

3. Project implementation timeline.
4. Proposed data protection mechanism to prevent data leaks from the visualization platform.