Answers to Question in reference to Request for Proposal for Project Management And Software Development (Ref. PF-NP-CO-2024-11-29)

1. **Data Integration with DHIS2:** What APIs does DHIS2 provide for data extraction or fetching into the proposed PMS? Or the required APIs need to be developed on the proposed system part? Are there any limitations or considerations for such integration (e.g., data formats, frequency, or volume)?

   Answer: Refer to DHIS2 documentation at https://docs.dhis2.org/en/develop/using-the-api/dhis-core-version-239/introduction.html - however PMS consultant is not required to work inside of DHIS2 instance. API from the DHIS2 will be provided.

   Introduction - DHIS2 Documentation

   Overview¶. The Web API is a component which makes it possible for external systems to access and manipulate data stored in an instance of DHIS2. More precisely, it provides a programmatic interface to a wide range of exposed data and service methods for applications such as third-party software clients, web portals and internal DHIS2 modules.

   docs.dhis2.org

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2. **Scope of API Integration:** What specific scenarios, use cases or data flows are planned for API integration? Are there any preferred standards or protocols (e.g., REST, SOAP) for these integrations? Should they be designed for real-time or batch data transfers, and are there any performance or latency expectations?

   Answer: API integration will cover data syncing for dashboards, program tracking, and financial reconciliation. REST is preferred; integration should support both real-time and batch data transfers with minimal latency.

3. **AI Tools:** Are there any existing AI tools or frameworks planned for integration within the proposed system? If so, could you provide details on the AI models or frameworks intended for use, as well as any integration requirements, performance benchmarks, or expected outcomes?

   Answer: If AI tools are included, they will likely involve predictive analytics or NLP models for dashboards or chatbots. Specific frameworks (e.g., TensorFlow, GPT-based models) should meet performance benchmarks and defined outcomes. This depends on the over-the-shelf PMS that we procure.

4. **Technology Stack:** Is there a preferred technology stack for development and deployment? Are there any constraints or recommendations regarding platform compatibility (e.g., specific operating systems, cloud providers)? Additionally, are there any infrastructure dependencies (e.g., server environments, database technologies)?

Answer: Development is limited to middleware if required, data viz dev to be done inside the PMS UI and framework. However, if required, Recommended stack includes Python/Node.js, PostgreSQL, and Docker, with compatibility for Azure or AWS hosting.

5. **Dashboard Customization:** Are there existing guidelines, rules, or templates for dashboard customization, or should these be defined during the project? If user stories or requirements documents for dashboard functionality already exist, could they be shared with us to ensure alignment with end-users' expectations?

   Answer: Templates and guidelines for dashboards should be defined during the project unless existing requirements/user stories are shared.

6. **Dynamic Queries:** Will the system require support for dynamic or user-defined queries, allowing users to configure or build their own reports? If so, could you provide examples of expected use cases or reporting tools, and any limitations on data access or query complexity?

   Answer: User-defined queries for reports are expected, with limits on query complexity for database performance. Reports based user's role and permission matrix is expected.

7. **User Load and Scalability:** What is the estimated number of active and concurrent users expected during peak usage? Are there any specific performance or scalability requirements we should be aware of when designing the system to handle peak loads?

   Answer: The system should support around 300 active users, 100 concurrent users, and scalable growth. However, this is handled by PMS itself.

8. **Project Management Features:** Should the proposed system include project management features such as task assignment, time tracking, and payroll? If so, are there specific functional or non-functional requirements for these modules? Are there any third-party tools to be integrated with these features/functionalities.

   Answer: NOT application - handled by PMS itself. No 3rd party integration other than modules available from PMS.

9. **Payroll system as a feature:** Will the proposed system include payroll as a feature or sub-system? Could you confirm if the scope of payroll features is limited to payroll slip generation (including calculations for taxes, deductions, and net salary), or does it extend to accounting and banking integrations (such as bank payments, financial reports, or tax filing)? If accounting or banking integrations are required, could you provide more details on the expected functionality?

   Answer: NOT Applicable

10. **Data Export Formats:** Will the system require integration with external systems beyond DHIS2 and other specified platforms in the RFP document? If yes, what are the expected data export formats (e.g., CSV, Excel, XML, JSON)? Are there predefined schemas or templates for these formats, or should they be designed as part of the project?

Answer: Integration with data from DHIS2 is a must, other expected formats like CSV, Excel, JSON, XML; or other templates supported by PMS itself.

11. **Quality Assurance and Validation:** What type of testing framework or methodology do you envision for this project (unit testing, integration testing, UAT, etc.)? Are there specific quality assurance standards, tools, or guidelines that should be followed to ensure the system meets your performance and security expectations?

    Answer: Most of this is handled by PMS core; while for also the custom work performed by vendor unit testing, integration testing and UAT are required.

12. **Multilingual option:** Will the system require multilingual support for user interfaces or data input.

    Answer: Multilingual option for PMS UI is provided by PMS itself. No intervention required from vendor.

13. Could you kindly share a few workflows critical to your organization's project management processes?
    Answer: Critical workflows include activity tracking against annual work plans, integration of programmatic data for dashboards, and approval processes for project milestones. Most, if not all, of data for PMS is received as input from DHIS2's API. PMS is primarily to showcase data viz for project activities and their status.

14. What is the estimated number of users who will interact with the Project Management System?

    Answer: Already answered in previous question. The system should support around 300 active users, 100 concurrent users, and scalable growth

15. Are we expected to bear the cost of deployments, or will this be managed by your organization?

    Answer: No, Helen Keller will. Vendor can propose deployment strategy of the system from their side.

16. Is there any existing platform currently in use that the PMS will replace or integrate with? If so, what are the primary reasons for transitioning to a new system?

    Answer: Over-the-shelf PMS will be procured, this consultant/vendor shall be involved the procurement of the PMS. Integration of data into this PMS is the central activity/task for this entire project.

17. Could you provide an estimated budget for the project?

    Answer: Proposal should include estimate from the vendor's side - there are 6 deliverables for this project. Procurement of PMS is handled and procured by Helen Keller.

18. What specific data flows are expected between the PMS and systems like DHIS2 and NetSuite?
    Answer: Data will flow from DHIS2 into PMS for program data visualization and reporting.

19. Will existing APIs be provided, or will the consultant need to develop custom integration solutions?
    Answer: Existing APIs for DHIS2 will be provided; custom middleware may be required for specific use cases - data originating application (DHIS2) provides API.

20. What security and compliance requirements are expected for the PMS, particularly in line with USAID guidelines and data protection?
    Answer: PMS must adhere to USAID's data protection guidelines, ensuring PII and sensitive data are safeguarded. Data inside PMS is handled by PMS itself - over-the-shelf PMS will be procured and provided to the consultant.

21. Are specific encryption standards or backup mechanisms required?
    Answer: AES-256 encryption and TLS 1.2+ are required; daily backups with off-site storage must be implemented. This is handled by PMS unless middleware is developed which needs to keep track of the requirement.

22. What technical constraints or requirements exist (e.g., software version compatibility, hosting requirements)?
    Answer: None - specifically. Over-the-shelf PMS needs to pull data from DHIS2 API

23. Will Helen Keller International provide access to current system documentation and databases?
    Answer: Relevant documentation, including APIs and workflows for the DHIS2 instance and PMS, will be provided by Helen Keller International.

24. Does the scope of work cover the entire project (software development, integration, training, etc.), or is it limited to project management only?
    Answer: Covers customization, developing data viz, integration, training, and ongoing support of the project management. Also mentioned in the deliverables.

25. Will experts or team members (e.g., software developers, integration specialists) be provided by your team, or will we need to supply the entire team?
    Answer: Consultants must supply a full team or an individual (if a single person is going to perform the task), though Helen Keller will provide oversight.

26. What is the expected format and details for user training materials and manuals?
    Answer: Materials should include user guides, tutorials, and context-specific examples. Should reflect usage of USAID Integrated Nutrition work.

27. What metrics will be used to assess the functionality, accuracy, and scalability of the PMS?
    Answer: NOT Applicable - as existing PMS is to be used.

28. Is there a preferred testing methodology?
    Answer: UA tests with different functional units of USAID Integrated Nutrition.

29. Is there a predefined budget for the project, or should the proposal include a cost-benefit analysis?
    Answer: No predefined budget that can be made public.

30. Will the project be conducted remotely, or is on-site work required?

Answer: Mainly remote; on-site work required for initiation, setup and key training sessions.

31. If on-site work is required, will Helen Keller International cover travel or other expenses for consultants?
    Answer: Helen Keller will cover reasonable travel expenses required for on-site activities outside Kathmandu valley.

32. If on-site work is required, during which timeframes is physical presence expected on-site?
    Answer: On-site presence is expected during system setup, key milestones, trainings, report sharing events. However, a focal person from the vendor is expected to be in close communication with the focal person from Helen Keller. A focal person or a developer or a member of the team is expected to work physically from Helen Keller Lalitpur office - for most of the time during this project.

33. If travel is necessary, what is the scope and frequency of these trips?
    Answer: Around 3-4 trips during key project phases, with detailed coordination. Trip will be accompanied by Helen Keller staff.

34. Is there a specific communication channel or tool for feedback and updates?
    Answer: We prefer Microsoft Teams or SharePoint or Slack for updates and feedback. Vendor is free to share there preferred communication channel or tool.

35. What post-deployment support or maintenance services are expected after August 2025?
    Answer: At least one year of support is expected for bug fixes and minor upgrades for the work carried by the vendor and those not related with PMS core.

36. Are there provisions for scaling or upgrading the PMS in the future?
    Answer: The PMS must support future enhancements like additional modules and user capacity. This is PMS feature - vendor needs no intervention.

37. Should the technical proposal include only the CV of the project manager (PM), or are CVs for team members (e.g., software developers, integration specialists) also required?

    Answer: Include CVs for the Project Manager and other key personnel like developers, and others which you think might help achieve overall project's deliverable on time.