Project Management Tool

Terms of Reference (ToR)

Planning Section

October 2021

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Background

Currently, the Lebanese Red Cross is implementing and coordinating with the support of its Partner National Societies (PNS) more than 120 projects yearly, and the need for such a software has become more essential than ever to organize the flow of grants, proposals, reporting amongst other things. This need has been highlighted due to several challenges faced during the implementation of projects, such as, lack of accessibility to all needed documentation, discrepancies across the national society, and delays in regard to administrative tasks and deadlines. Early on in 2020, the Planning section began with its efforts to create a unified and central hub for all needed project resources, where these challenges and needs were highlighted. The creation of a managerial software would allow LRC to enhance the implementation of its projects in two phases, initially by creating a central accessible solution of program managers and LRC higher management to track and follow-up on the processes of grant agreements and proposals, and secondly to enhance the monitoring of projects, coordination with finance, and with activities timelines.

Objective

The objective of this software is to unify the project management process across LRC programmatic projects in order to deliver more efficient operations all while maintaining commitments to PNSs. The aim of this tool is to:

1. Allow LRC to easily plan projects while taking into consideration previous agreements into account,
2. Follow-up on the progress of projects in relation to budget, reporting and other related commitments,
3. Compile all relevant project documentation in a unified and accessible database,
4. Ensure budgets and resources are used on time with respect to the time frame,
5. Enhance internal communication between stakeholders, and
6. Provide real-time updates on the status of projects, with the focal person for each task

Methodology

Key phases of the implementation process

This project will be implemented in two phases:

I. Documentation and Archiving

The first (current) phase of the development will focus on the development of a central hub for LRC documentation and archiving. This online database will provide simple access to relevant stakeholders across the national society related to their projects, in addition to project dashboards which will provide timely updates on progress of projects as well as project important information.

II. Project Development

The second phase (not within the scope of this ToR) of the development will enhance the grants and proposal submission process by linking the several steps taken in it, the platform would automatically update individuals on the status of proposal/projects, if they have been accepted, rejected etc. In addition, individuals would have access to templates to be used throughout this process.

Tools to be used

The Lebanese Red Cross is increasingly reliant on **Microsoft Office 365** on its day-to-day activities; therefore, **Microsoft Dynamics** has been selected as the platform to be used in order to carry out its Knowledge Management and Process Management activities along with the utilization of **SharePoint, Power Automate and Power BI**. As LRC has a **Microsoft Dynamics Customer Relationship Management (CRM) license for 500** concurrent users that allows for the development and customization of the limited resources and time, thereby benefiting from a wide range of Microsoft partners and experts in Lebanon and the region. The use of this platform will enhance collaboration between teams, as it will have a search engine built-in which helps consolidate all content together and presenting it in a user-friendly way. Additionally, it would be a place to store documents and customize workflows based on existing processes, where documents can be edited using office products and can be accessed anytime anywhere, and on which calendars can be created to display crucial deadlines to teams.

Development of Software and Specifications

During **Phase 1**, the software will be used to **upload project documents** which **automatically starts the archiving and documentation** procedure and gives access to relevant users **as per the naming/labeling** of the file, automatically **send reminder emails about deadlines**, progress and updates, and where individuals will easily create project **entries using a pre-set template**. Access will be defined by one or two admin that have overview of all projects. Moreover, the first phase will also focus on creating a link with the platform used by the finance department for the financial follow-up aspect of projects, only at the level of the total budget

I. Permissions and Accessibility

The platform will have one or two administrators who can give different layers of access to stakeholders depending on their level of involvement in the project. Stakeholders can access the platform to get information about specific projects, as well as upload files related to it. Taking into consideration the right notion of permission and accessibility, the people that will be using this tool can only access the software using their LRC accounts for safety and security reasons, amongst which we have: *Planning Section members, PMER focal people in the sectors\sections, SG's Office, Sectors'/Sections' Directors and Project Managers.*

The software will be personalized according to each users' details; users from a certain team will view and be able to edit only the items relevant to them. This will also enhance security and data sharing within LRC. Additionally, the software should be able to easily send automatic email reminders to concerned stakeholders to remind them about project specific details such as: *report submission deadlines, submission of cash requests timelines, and others.*

The information projected on this tool is sensitive and should be cared to with high confidentiality (even internally). This step is to prevent the compromising of accounts, legal or reputational damage, info identity theft and other sever consequences. With that in mind, the following are the suggested accessibility measures:

- ***Admin access:***
  - Planning Section Director,
  - Programmatic Donor Liaison
- ***View access with ability to download documents:***
  - Planning Section officers,
  - SG's Office,
  - PMER focal people,
  - Sectors'/Sections' Directors.
- ***Ability to upload reports:***
  - PMER focal people.
- ***View access:***
  - Project Managers

II. Archiving and Documentation

The platform would serve as a project database for documentation and archiving, it should have a drag and drop feature for easy upload of files and should archive all project related documentation **endlessly though data classifications and file labeling** in order to enhance security, knowledge management, protection against employee turnover, for easier onboarding of staff and volunteers, and finally the process would help with mapping of services within LRC. It is important to note that the software should have:

1. A feature that avoids deletion by error component, only admins can delete folders which are also archived in a sub-location in case they were needed in future times.
2. A search engine to look-up any document, or any specific keyword
3. An automatically generated project number
4. A feature that allows to easily extract/download a comprehensive project matrix from the software under an excel form, and this can be for all project

(closed or ongoing) for projected filtered by Partner for projected filtered by year or by sector/section etc.

5. Ability to <u>export data in readable formats</u> in case any issues with licencing or connectivity.
6. Ability to <u>automatically create local backup(server TBD)s</u>.

III. Platform design and structure

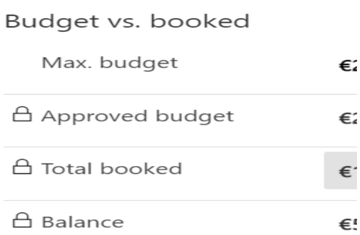
Dashboard

Dashboards should be simple to create without the use of coding or external support and the platform should be able to display project-specific dashboards which would provide its users with all project relevant details such as:

1. Partner,
2. Start/end date,
3. Concerned Sector, Focal Person, and program manager,
4. Budget Allocated and if any top-ups were made
5. Type of activities,
6. Status, if it is on-going or closed, amended or not.

What we aim to show:

Figure 1: Project Brief/Summary



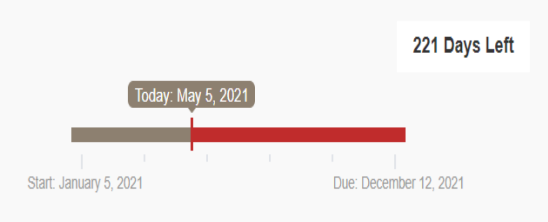


Figure 2: Financial Status/Progress

Figure 3: Financial Status/Progress

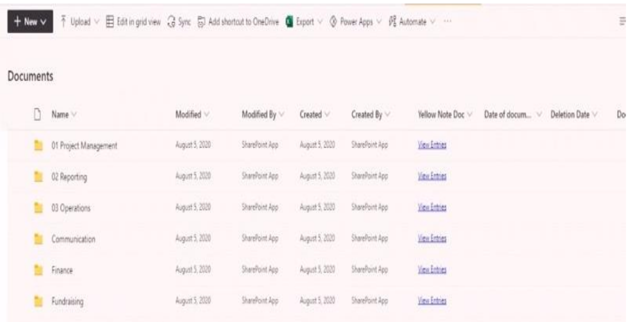


Figure 4: Folder Structure

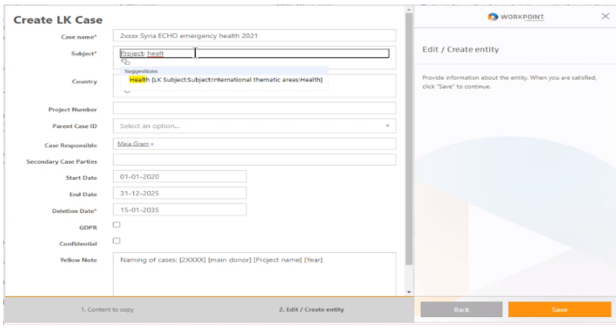


Figure 5: Case Entry Form

Figure 6: Dashboard

Figure 1 inspired from the Danish Red Cross SharePoint site shows a summary of all project relevant details, this should be generated automatically from the entries made in the project entry form, as shown in **Figure 5. Figures 2 and 3** showcase the financial progress of projects, as inspired by the IFRC Platform the first arrow would be for the expenditure per day over the project duration, the second one for the total expenditure from the total budget, and the third one for the cash transfers made in comparison to the total budget. **Figure 4** showcases the folder structure that is displayed on the software. **Figure 6** showcases an example of the dashboard created by the administrator as per their need.

Folder Structure

Projects on the software should be archived per year (1), per partner (2), and per project (3). The folder structure should be preset, whereas all main folders should include sub-locations that are pre-defined to ensure the highest efficiency in archiving as they should be divided in the following format:

(1) Year
(2) Partner
(3) Project
- **(3.1)** Memorandum of Understanding
- **(3.2)** Proposal Package
- **(3.3)** Reports
- **(3.4)** PMEAL Documents (Log-frames, MEAL Plans, etc.)

Moreover, the software should also allow users to easily filter their searches per year, project, sector, focal person and start/end date when browsing on the software. Additionally, users with the necessary access should be able to add and delete folders.

Resources and Considerations

To ensure the proper implementation and functioning of this software, special considerations need to be taken into account and require the development of the necessary guidance and resources, such as:

Encrypt sensitive files.

By encrypting sensitive files, the admin can protect them from being read or used by those who are not entitled to do either.

Manage data access

Admin should ensure that access is only authorized and granted to those who have a "need to know". Users should also authenticate their access with strong passwords and maybe a two-factor authentication. Admin should periodically review access lists and promptly revoke access when it is no longer necessary.

Securely dispose of data, devices

1. Sensitive data must be securely erased to ensure that it cannot be recovered and misused.
2. Devices that were used to store sensitive information should be securely erased to ensure that their previous contents cannot be recovered and misused.

Manage Data utilization

Admin should have an overview on any misusing of sensitive data. Any violation of the privacy and confidentiality of that data and of the individuals or groups the data represents should be easily spotted.

Deliverables

Focal persons from the LRC should be looped in during the development phase through meetings and trials of the tool.
Technical workshop for the LRC Focal Points and the users of the tool should be conducted by the developers at the end of the development.

Next Steps

The proposed ToR focuses on the development of the first phase of the project, yet, for better and more efficient planning, the software would be finalized once the second phase is completed which would focus on proposal status and submission, MoU updates and progress, and would have a section for relevant documentation and guidelines.
Hence the first module should be developped with that end in mind.
Techincal meeting between LRC Planning Section and the developer should be conducted before the development phase to clarify all the processes.

Timeframe

Timeframe for developing and delivering this software is two months from the date of the signature of the agreement.

Focal persons from LRC

Planning Director