

Scope of Work / Terms of Reference (ToRs)
Project Title: “Design, Configuration and Deployment of a Web-Based Project Monitoring and Performance Dashboard for SMEDA Business Plan”

1. Introduction and Background

The Small and Medium Enterprises Development Authority (SMEDA) has developed a comprehensive Business Plan for the period 2025–28, comprising a multi-year portfolio of projects and interventions. These projects encompass policy and ecosystem formalization, inclusion and women entrepreneurship, market access and trade facilitation, value chain strengthening, institutional development, competitiveness enhancement, access to finance, and climate resilience.

The Business Plan establishes structured operational targets across multiple dimensions including enterprise outreach and engagement, capacity building and upskilling, direct financial support through grants and facilitation instruments, and institutional infrastructure development. Targets are phased across fiscal years following a deliberate scale-up model, with budget allocations and beneficiary projections distributed both temporally (through quarterly and annual milestones) and geographically (across provinces and regions).

As the portfolio moves into its implementation phase, SMEDA requires a unified, real-time mechanism to monitor progress across its full project portfolio against planned targets and budgets. This Terms of Reference defines the requirements for a web-based dashboard solution that will serve as SMEDA’s central monitoring and performance management platform for the Business Plan portfolio.

2. Objectives of the Assignment

The primary objective of this engagement is to design, configure, and deploy a web-based Project Monitoring and Performance Dashboard that serves as SMEDA’s central performance management platform for the Business Plan 2025–28 portfolio (The solution should be designed to ensure scalability over the coming years). The system shall enable SMEDA to:

- Track progress of all projects across strategic themes against planned quarterly, bi-monthly, and annual targets as defined in the Business Plan.
- Consolidate data entered by multiple project management teams into a unified dashboard accessible to senior leadership and decision-makers.
- Visualize Key Performance Indicators (KPIs) covering enterprise outreach, beneficiary engagement, capacity building, financial support, and institutional development milestones.
- Enable regional and provincial disaggregation of progress data aligned with the geographic distribution framework of the Business Plan.
- Support evidence-based decision-making through real-time data consolidation, trend analysis, and structured automated reporting.
- Establish a durable M&E framework aligned with the Business Plan’s Results Framework, enabling SMEDA to demonstrate contribution to national economic outcomes.
- Provide a scalable, cost-effective, and institutionally sustainable solution that SMEDA can operate and maintain beyond the initial implementation period.

3. Scope of Work

The scope of work is organized into seven workstreams. The selected firm shall deliver all workstreams as an integrated engagement, ensuring coherence between the M&E framework design, the data architecture, the dashboard configuration, and the capacity-building components.

3.1 Business Plan Review and Framework Design

The firm shall begin with a structured review of SMEDA's Business Plan 2025–28, existing monitoring arrangements, and reporting requirements. Based on this review, the firm shall:

- Develop a comprehensive Monitoring Framework aligned with the Business Plan's strategic themes, covering input, output, outcome, and impact indicators.
- Design a Logical Framework (LogFrame) and Results Framework that maps program interventions to intended outputs, outcomes, and national-level impact indicators (where possible)
- Define program KPIs for all programs and sub-projects in the portfolio, including indicator definitions, data sources, collection frequency, baseline values, and targets for each fiscal year.
- Develop a Reporting Plan specifying data gathering methods, responsible parties, reporting cycles, and data quality assurance procedures.
- Produce a Master KPI Register consolidating all indicators across the portfolio for integration into the dashboard data model.

3.2 Requirements Analysis and Data Architecture Design

The selected firm shall conduct a detailed requirements analysis to translate SMEDA's Business Plan into a structured data model. This includes:

- Mapping all projects with their associated KPIs, target beneficiaries, budget allocations, quarterly distribution ratios, and provincial breakdowns as defined in the Business Plan.
- Defining the data entry schema for each project, specifying which fields are entered by project managers (actuals) versus system-calculated (variances, cumulative totals, percentage completion).
- Designing data validation rules to ensure data quality and consistency across teams, including mandatory field enforcement, numerical range checks, and date-based entry windows.
- Designing database architecture for large-scale data management, including data storage protocols, backup and recovery procedures, and data security standards.
- Mapping user roles and access levels: Project Managers (data entry), Theme Leads (theme-level review), Senior Management (portfolio-level dashboards), and External Reviewers (read-only access).

3.3 Platform Selection and System Configuration

The solution shall leverage an appropriate platform or combination of platforms, which may include commercial SaaS tools, open-source solutions, or custom-configured systems based on the firm's recommendation and SMEDA's operational requirements. The selected platform must meet the following criteria:

- Web-based and fully functional across Mac and Windows environments without requiring desktop software installation.
- Support structured data entry by multiple concurrent users with role-based access controls.
- Provide native or integrated dashboard and visualization capabilities sufficient to display KPI progress, budget utilization charts, and regional distribution views.
- Support configurable reporting periods including quarterly and bi-monthly intervals.
- Enable data export in standard formats including Excel and PDF for offline reporting and board presentations.
- Offer reasonable cost scalability for 15–25 active users across data entry and dashboard consumption roles.
- Demonstrate long-term sustainability for institutional use by SMEDA with minimal ongoing licensing or maintenance cost burden.

The firm shall present a comparative assessment of platform options with a justified recommendation based on SMEDA's operational context, team capabilities, data volumes, and long-term sustainability requirements.

3.4 Dashboard Design, Development, and Deployment

The firm shall design and build the following dashboard views:

- **Portfolio-Level Executive Dashboard:** A consolidated view showing overall Business Plan progress against the portfolio-level KPIs including MSME reach, formal engagement, women participation, upskilling completions, grant disbursements, and financial facilitation. This dashboard shall include aggregate budget utilization and theme-level progress summaries, with trend analysis and variance flagging.
- **Theme-Level Dashboards:** One dashboard per strategic theme showing project-level progress within that theme, displaying project-wise target versus actual for the current reporting period, cumulative progress, budget consumption, and provincial distribution of beneficiaries.
- **Project-Level Detail Views:** Drill-down views for each project showing quarterly and bi-monthly target versus actual trends, milestone completion status, budget burn rate, and project-specific KPIs.
- **Regional Distribution View:** A provincial breakdown dashboard showing progress across Punjab, Sindh, KPK, Balochistan, and ICT, aligned with the regional allocation percentages (available with the program teams)
- **Government and Stakeholder Reporting Interface:** Structured views and automated reports suitable for submission to the Ministry of Industries and Production, Finance Division, development partners, and other oversight bodies, formatted to public sector reporting standards.

3.5 Data Entry Interface Design

The firm shall design and implement structured data entry interfaces for project management teams. The data entry layer must:

- Provide pre-populated target fields based on the Business Plan's quarterly and annual targets so that project managers only need to enter actual and progress values.
- Include dropdown selections for standard fields such as project name, theme, province, and reporting period to minimize free-text entry errors.
- Support both direct grid-based entry for teams comfortable with spreadsheet-style interfaces and form-based entry for simplified guided data submission.

- Maintain a full audit trail showing who entered or modified data and when, to support accountability and data governance.
- Integrate data flows to ensure that data is collected digitally and automatically synchronized with the central dashboard.

3.6 Capacity Building, Knowledge Transfer, and Post-Implementation Support

The firm shall deliver the following components:

Training and Capacity Building:

- Structured training sessions for Project Managers (workstream leads) on data entry procedures covering at least two half-day workshops.
- Training for Theme Leads on dashboard interpretation, report generation, and data quality review covering at least one full-day workshop.
- Training for Senior Management on executive dashboard navigation and report extraction.
- A user manual documenting data entry procedures, dashboard navigation, troubleshooting steps, and administrative functions.
- An administrative guide covering platform configuration, user management, reporting period setup, and template modification procedures for SMEDA's internal IT or operations team.

Post-Implementation Support and Handover:

- Provide post-deployment operational support for a minimum of three months following go-live, covering issue resolution, query management, and minor system adjustments.
- Manage all stakeholder communications throughout implementation, ensuring smooth adoption across SMEDA's project management teams.
- Conduct troubleshooting sessions and provide rapid-response technical assistance during the support period.
- Prepare and deliver a formal Handover Package including full system documentation, configuration files, administrator credentials, data dictionaries, and training materials to enable SMEDA's internal team to manage the dashboard independently.
- Provide recommendations for long-term system maintenance, upgrades, and expansion of dashboard functionality aligned with evolving Business Plan requirements.

3.7 Testing, Validation, and Deployment

Prior to final deployment, the firm shall:

- Populate the system with historical and baseline data from the Business Plan to validate all calculations, visualizations, and alert mechanisms.
- Conduct User Acceptance Testing (UAT) with representatives from each project management team.
- Address all defects and feedback items identified during UAT within an agreed resolution timeline.
- Deploy the production system and confirm access for all designated users.

4. Key Deliverables

The following deliverables shall be produced and approved by SMEDA before the corresponding payment milestone is released:

#	Deliverable	Phase	Approval Required
1	Inception Report including M&E Framework, KPIs Register, and Data Entry Plan	Phase 1	Before Phase 2

#	Deliverable	Phase	Approval Required
2	Data Architecture Design Document and Platform Recommendation with comparative assessment	Phase 2	Before Phase 3
3	Configured dashboard prototype including all dashboard views for UAT review	Phase 3	Before UAT
4	UAT completion report with documented resolution of all defects and feedback	Phase 4	Before go-live
5	User Manual, Administrative Guide, and Training Materials		-
6	Deployed production system with full user access confirmed		-
7	Formal Handover Package including all documentation, configuration files, and sustainability plan		
8	Post implementation support and trouble shooting of bugs in the system.	Phase 5	3 Months after deployment

5. Implementation Timeline

The total engagement period and time of completion of the assignment is 7 Months.

1. System Deployment and Operationalization (from Phase 1 – Phase 4) = 4 Months
2. Post Implementation Support/Trouble shooting of identified bugs issues in system = 3 Months

6. Payment Schedule

The payment to the successful consultant shall be made as per following schedule;

Completion Phase	Payment Release Percentage
Phase 1	Up to 15%
Phase 2-4	Up to 80%
Phase 5	Up to 100%