

**INTERNATIONAL PLANNED PARENTHOOD FEDERATION  
(IPPF)**

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**TERMS OF REFERENCE FOR  
HIRING OF PROJECT MANAGEMENT CONSULTANT TO SUPPORT IPPF IN ROLL OUT OF  
AUTOMATION OF ITS TRAVEL AND EXPENDITURE MANAGEMENT SOLUTION**

**November 2024**

## 1. Background

IPPF is a global healthcare provider and a leading advocate of sexual and reproductive health and rights (SRHR) for all.

Led by a courageous and determined group of women, IPPF was founded in 1952 at the Third International Planned Parenthood Conference. Today, we are a movement of 150 [Member Associations](#) and Collaborative Partners with a presence in over 146 countries.

Our work is wide-ranging, including comprehensive sex education, provision of contraceptive, safe abortion, and maternal care and responding to humanitarian crises. We pride ourselves on being local through our members and global through our network. At the heart of our mission is the provision of – and advocacy in support of – integrated healthcare to anyone who needs it regardless of race, gender, sex, income, and crucially no matter how remote.

IPPF as a movement is supported by a secretariat that has offices in London, UK with sub offices in Geneva, Switzerland & New York USA, UN Liaison Office, Canberra (Australia), Regional Offices in Africa (Nairobi, Kenya/ Abidjan, Cote D' Ivoire); Arab World (Tunis, Tunisia); Americas and the Caribbean (Mexico City, Mexico and Port of Spain, Trinidad and Tobago); Europe (Brussels, Belgium); South Asia (New Delhi, India) and East, South East Asia and Oceania (Kuala Lumpur, Malaysia and Suva, Fiji).

As part of its drive to improve effectiveness and efficiencies of its back-end operations, IPPF the secretariat is now working towards automating its travel management and expenditure management process, including ensuring improve duty of care through integration with its existing security management system (Crisis24/ Horizon) and improved accountability with integration with expenditure management module (on NetSuite).

## 2. Purpose

The purpose of this terms of reference is to identify a project management consultant/consulting firm that will successfully oversee and deliver (in terms of time, quality and budget) automation of travel and expense management solutions across IPPF's secretariat.

As part of this, the scope of work to be managed by consultant/consulting firm shall involve stakeholder-focused needs assessments, synthesise requirements, present a standardized and coordinated approach/ design to ensure the successful implementation of a travel and expense management system, integrating it with existing organizational systems and workflows, facilitate the user acceptance testing, oversee and conduct trainings (both to super users and systems users), manage internal and external communication (including periodic update reports) and ensure that the initiative is implemented as per the approved timelines and within the identified quality expectations and budget.

This will require extensive collaboration with relevant stakeholders for initiatives and thus really good communication skills of the project lead, will be a huge advantage.

**The ToR is designed to allow both individual consultants and consulting firms to apply for the project.**

### 3. Scope of Work

The consultant/consulting firm shall work collaboratively with the stakeholders to translate initial concept documents into a clear and actionable project vision and roadmap. The consultant/consulting firm shall be responsible for overall project management, which will include the following key tasks:

#### **a. Solution Design**

- Understand the conceptual design of the solution to be deployed (copy of design attached).
- Undertake needs assessment. This will include a
  - ✓ clear understanding of integration with other solutions already deployed.
  - ✓ Preparation of a clear step-by-step process (end to end) for both travel and expenditure management.

#### **b. Vendor Onboarding and performance management**

- Coordinate an Expression of Interest (EOI) process to gather initial proposals from potential vendors, helping refine the project requirements for the bid process
- Undertake bid process. This includes
  - ✓ design of scope/ terms of reference including deliverables,
  - ✓ receive and review all proposals from prospective vendors,
  - ✓ support evaluation process,
  - ✓ negotiate pricing (under the guidance of the procurement committee) and
  - ✓ onboarding the selected vendor.
- Provide oversight on performance of the selected service providers.

#### **c. Stakeholder engagement and collaboration**

- Engage and collaborate with the IPPF IT teams and external third part vendors (wherever required), to agree on the deployment model, security and integration with SSON, NetSuite and other solutions
- Build and maintain positive relationships with all members of staff, and contacts within and outside the Federation.

#### **d. Solution testing and deployment**

- Evaluate and analyse the efficiency and effectiveness of the configured solution, devising strategies to fulfil user requirements and requests.
- Lead testing in the sandbox environment to gain understanding of system functionalities being developed and upgraded.
- Validate the configured solution based on user feedback and oversee the migration process into the production environment.
- Quality assurance:
  - ✓ Conduct User Acceptance Testing (UAT) and address identified gaps
  - ✓ Monitor performance metrics post-implementation to ensure desired outcomes
- Project Closure:
  - ✓ Support go-live process
  - ✓ Lead development of online and off-line training material in relation to systems developed.
  - ✓ Ensure training is provided to maximum number of users
  - ✓ Document project outcomes, lessons learned, and future recommendations
  - ✓ Ensure proper handover to operational teams for ongoing maintenance and support

**e. Project management**

- Identify resource requirements for projects, develop budgets including approval notes for the initiatives/ projects and get these approved.
- Build and ensure active engagement of internal working groups who would contribute to thinking for effective delivery and enhancement of current processes.
- Identify project related resource requirements (internal and external), identify focal persons/ leads across each office (as and when required), coordinate and collaborate with engaged resources and provide the necessary support to ensure the project is completed in a timely and successful manner.
- Develop and roll-out communication of the new release including generate periodic update/ status of initiative.
- Ensure timely and effective handover of newly configured solutions ensuring adequate knowledge creation and transfer, within the organisation.
- Be the focal person (single point of contact) and escalation point, during the period of project roll out (before go-live).
- Identify potential risks and formulate strategies to mitigate them. Continuously monitor and oversee risks across the entire project lifecycle of initiated projects.

**4. Deliverable and Timelines**

It is expected that the travel management solution shall be rolled out within six months. In this context the assignment will carry on up till the end of the project or six months, whichever is earlier.

As part of the above, the consultant/consulting firm shall produce significant deliverables, which will include

- a. Preparation of detailed work plan and budget
- b. Monthly progress report including tracking of progress against plan and timesheet (on the third day of the subsequent month)
- c. Any other report/ note required for implementation of the project

**5. Payment terms**

The amount payable to the consultant/ consulting firm shall be in six equal instalments based on monthly report and timesheet. The consultant/consulting firm could be offered, 10% additional bonus, in case the project is delivered ahead of time.

**6. Responsibilities**

The incumbent will be responsible for overseeing timely delivery of projects being overseen. This will include overseeing the projects performance:

- within the allocated budget,
- identifying financial risks,
- taking actions for mitigation and
- management reporting.

The incumbent will be responsible to provide advise to the Director, Finance & Technology and other finance team members, in ensuring better use of systems being configured and rolled out including about integration with other automation projects that are outside the remit of this assignment.

## 7. Selection Criteria

The evaluation of the consultant/consulting firm technical bid will be based on the following criteria

- Experience in managing large scale Transformation and Financial system projects (COTS) with successful outcomes.
- Proven experience in project management, specially in implementing IT solutions.
- Knowledge of financial and compliance frameworks related to travel and expenses
- Extensive exposure to related work, to include record of proven ability in team management.
- Excellent knowledge of implementation of these large-scale/ complexed IT Transformation projects, preferably in other charities or larger government organisations.

Key skills needed to do undertaken the tasks listed, *including* languages.

- Strong leadership, strategic thinking and problem-solving skills
- A strong analytical and quantitative mind-set
- Excellent project management skills
- Excellent IT skills (especially Microsoft Excel, power point, visio etc, to include a thorough knowledge of spreadsheet and database applications).
- Fluent English (oral and written) essential as well as excellent written communication skills. Knowledge of French, Spanish or Arabic advantageous.
- Excellent people management skills – team player, motivator, problem solver.
- Excellent interpersonal skills. Strong verbal communication skills required to train staff and convey complex financial information in an easily understandable form to non-financial staff.
- Excellent time management and organisational skills required in order to multi-task and meet tight deadlines.

## 8. Evaluation

All proposal submissions will be evaluated as follows:

- **Technical bid consists of 70%** and the breakup are as follows:
  - ✓ Relevant Project experience (20%)
  - ✓ Technical expertise in system implementation (20%)
  - ✓ Demonstrated understanding of Travel and Expense Management needs (10%)
  - ✓ Proposal quality and feasibility (20%)
- **Financial/ Price: 30%**

Consulting firm are required to include the team profiles, detailing specific roles (e.g. project lead, technical specialist).

Consultant/consulting firm must respond against each of the Evaluation Criteria listed above.

## 9. Procurement Timetable

The timetable for selection of project management consultant/firm, are provided below

27 <sup>th</sup> Nov 2024	Floating of Terms of reference
10 <sup>th</sup> Dec 2024	Submission of CV/ proposal

13 <sup>th</sup> Dec 2024	Shortlisting of Consultant firm/ individual
16 <sup>th</sup> – 20 <sup>th</sup> Dec 24	Selection and onboarding

IPPF is committed to safeguarding and promoting the welfare of children, young people and vulnerable adults and expects all employees, volunteers, contractors and partners to share this commitment. Anyone employed with IPPF agrees to sign and adhere to IPPF's Code of Conduct and Safeguarding (Children and Vulnerable Adults) Policy.

# INTEGRATED TRAVEL SECURITY & EXPENSE MANAGEMENT SOLUTION



# Overall Objective of the Solution

## Project Objective

To optimize travel and expenditure management processes by automating workflows, improving duty of care through integrated traveller safety management, enhancing financial control and compliance, and driving cost efficiency while enhancing employee experience and supporting sustainable business practices.

### Duty of Care

Increased ability to manage duty of care



### Improve User Experience

Intuitive solution enabling significantly improved user experience



### Better Compliance and control

Built in policies and workflows and integrated solutions

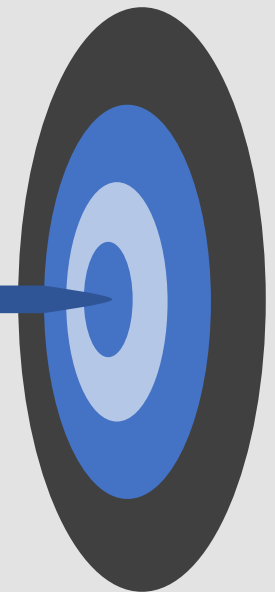


### Efficiency and effectiveness

Significantly faster and accurate data processing, value for money, improved reporting (incl ESG reporting), etc.



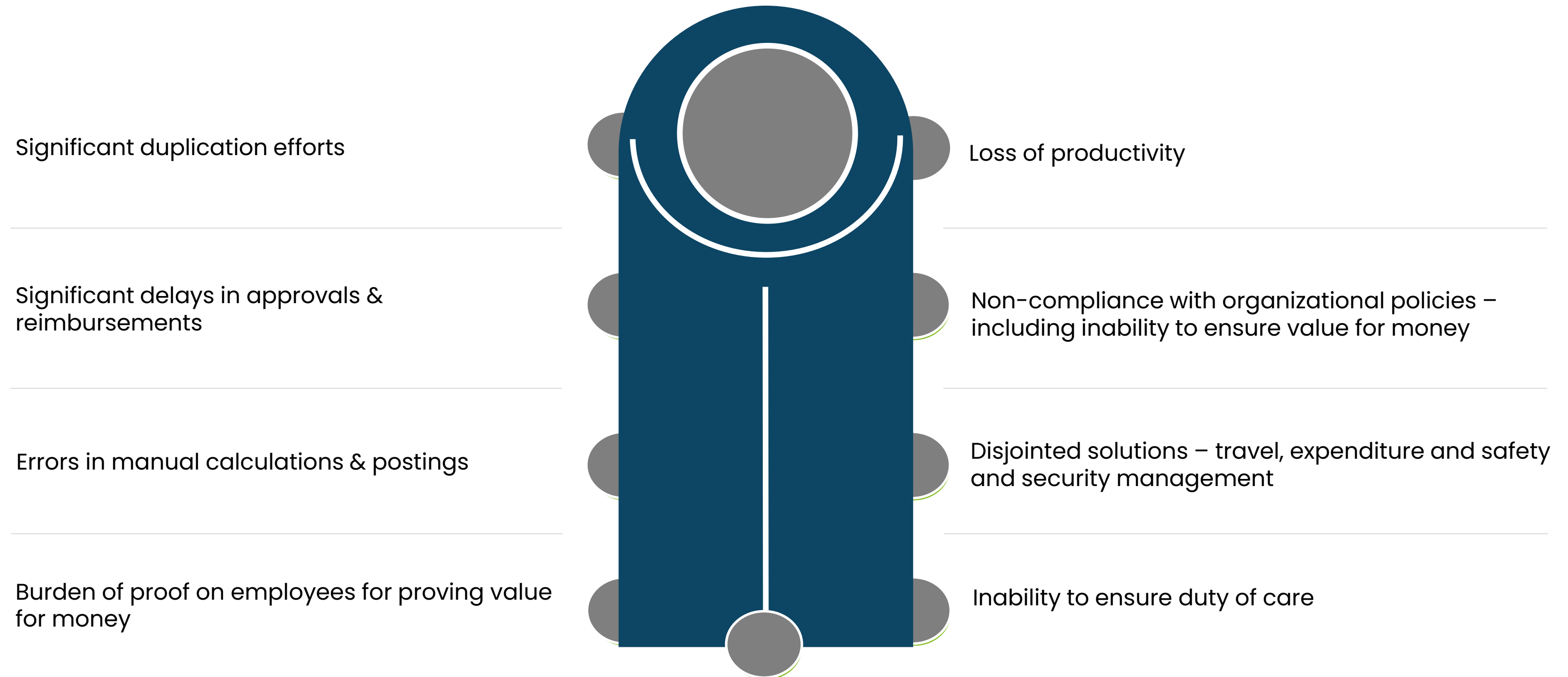
Revamped travel and expenditure management





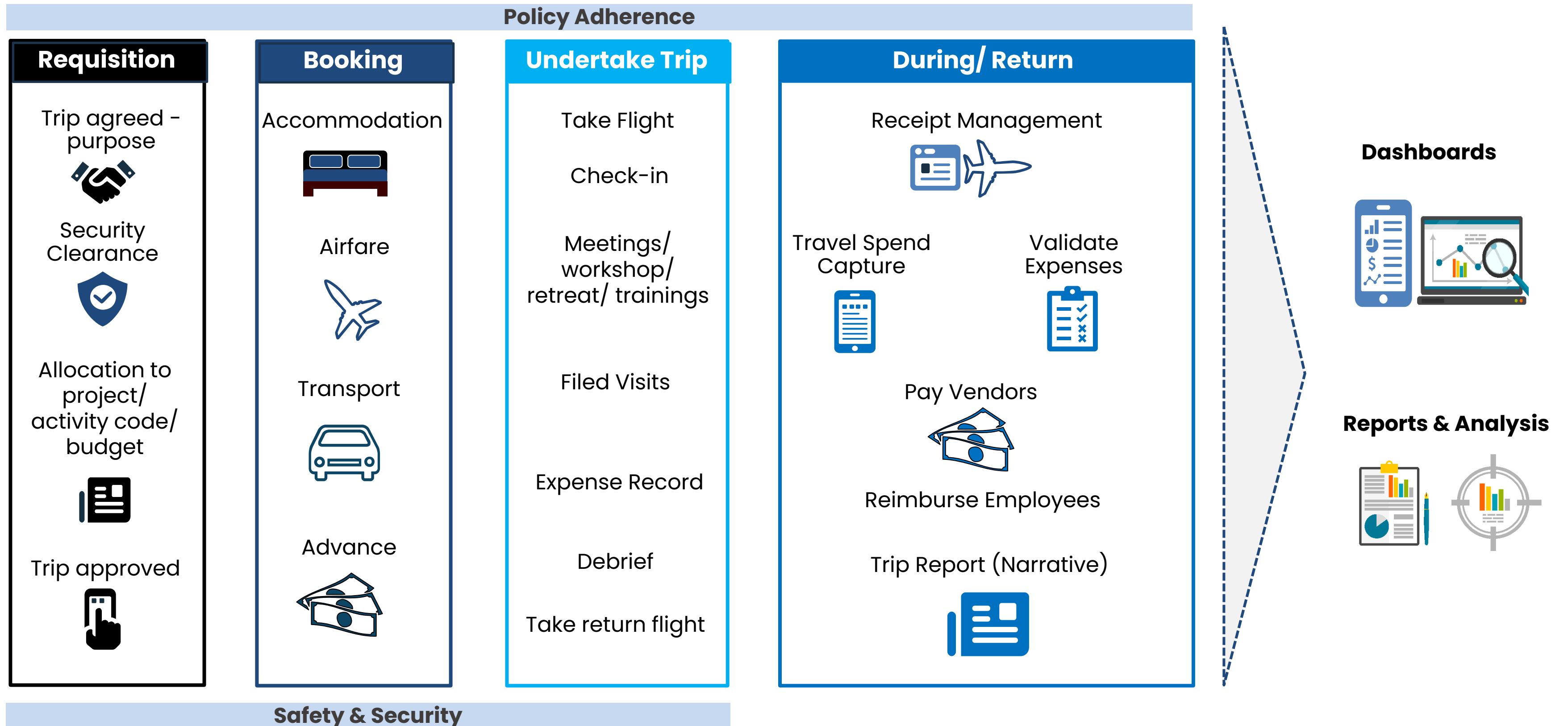
# Existing Key Challenges

IPPF faces several issues on travel and expenditure management. These have been presented below from an employee and organisation standpoint on the left and right side respectively



Excessive manual effort – generation of reports including carbon reduction commitment

# Travel Management Solution: High Level Design



# Expense Management Solution (Other than Travel)

Suppliers send invoices to a dedicated mailbox or commissioning managers forward invoices to dedicated mailbox



Convert Image to text



Data Validation



Convert Image to text

Credit Card holder/ budget holder uploads expenses incurred on business meetings, etc. – using mobile

Posted

Posted

The image shows two screenshots from the NetSuite system. The top screenshot is a 'Purchase Order' for PO# POCO29586, showing details like supplier (SUP1224 Stopaids), date (30/8/2024), and approval status. The bottom screenshot is an 'Expense Report' showing a list of expense items with columns for date, amount, and description.

Purchase Order

Expense Report

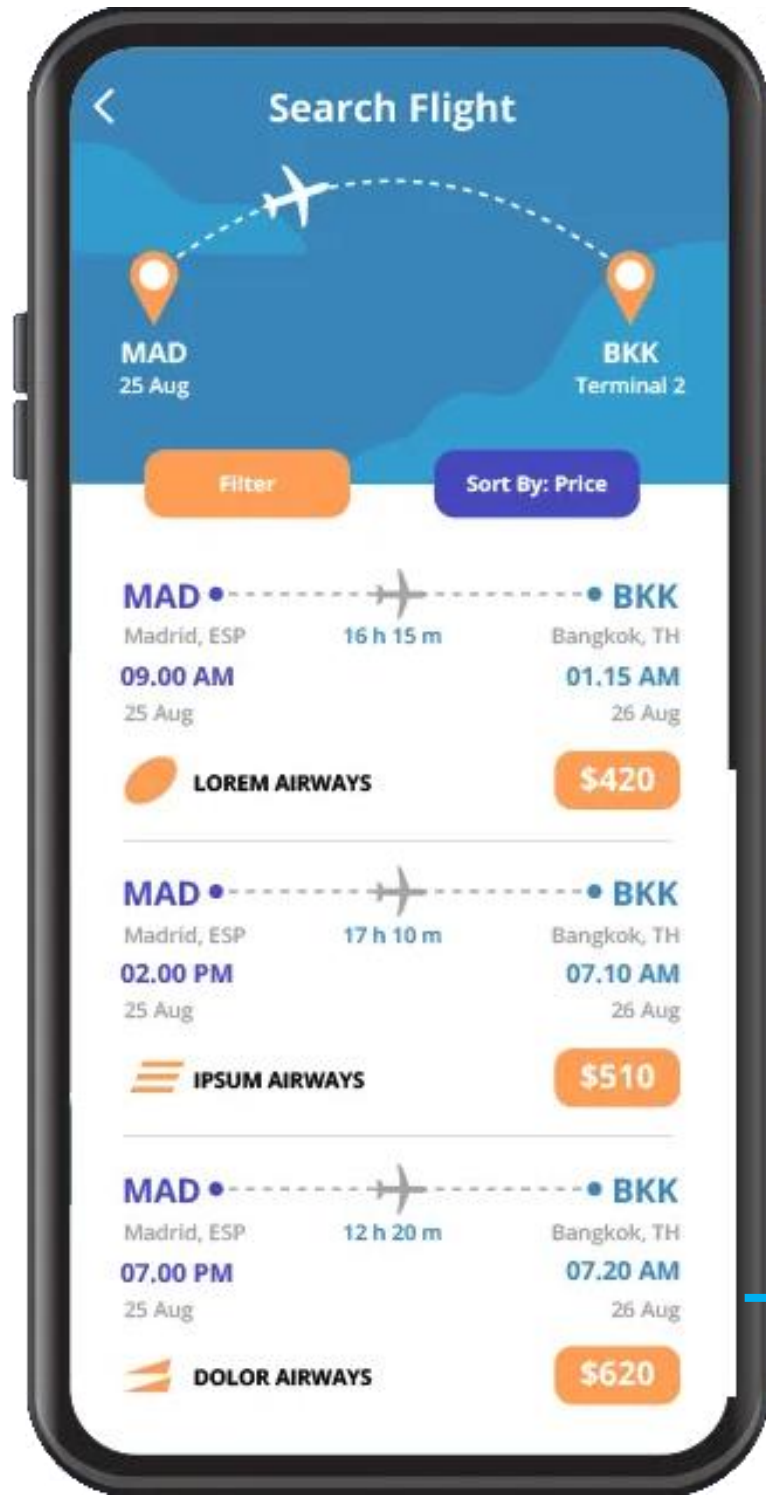
NetSuite Ledger

The screenshot shows the NetSuite Ledger interface with a 'General Ledger' table. The table has columns for date, amount, and description, and lists various ledger entries with their respective amounts.



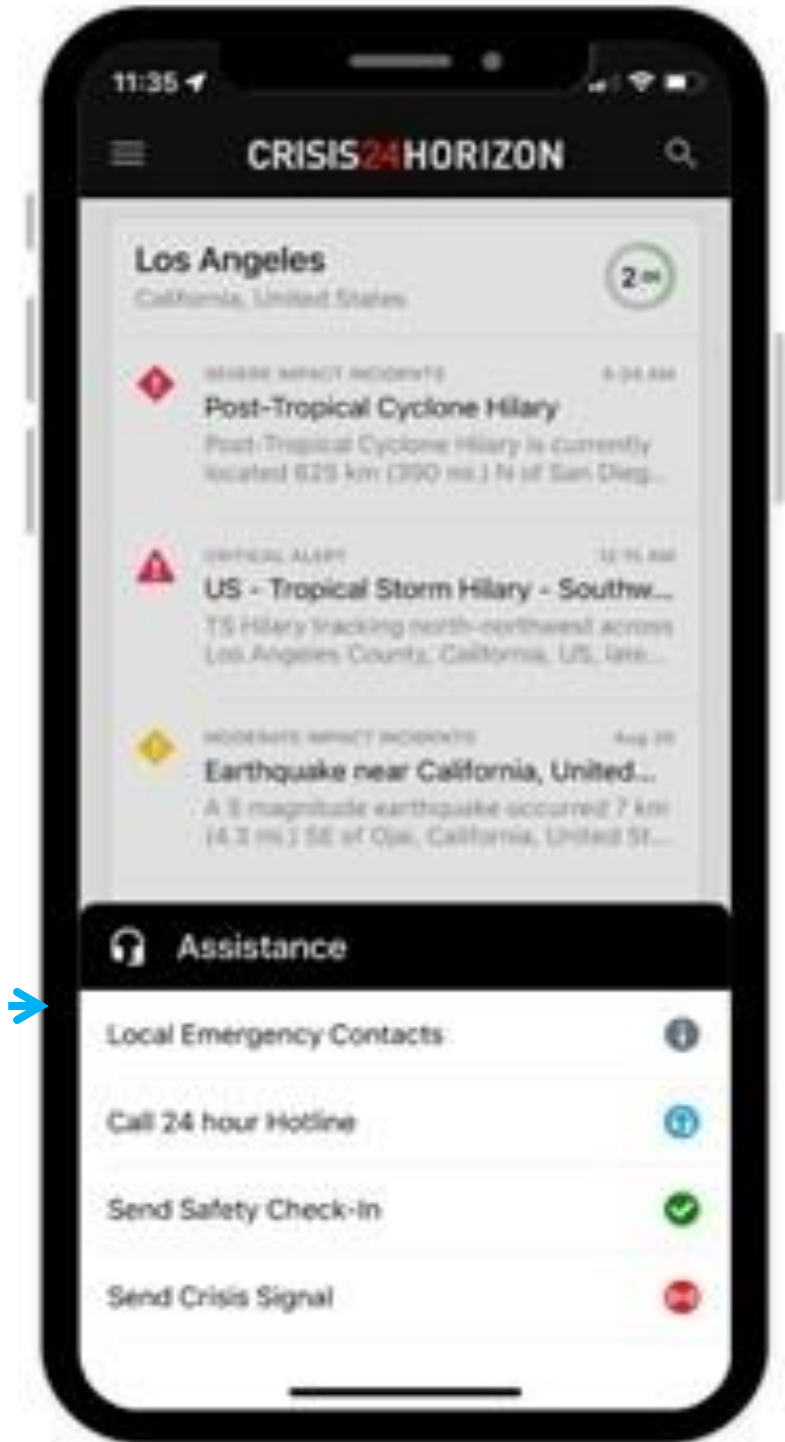
**Solution to be used for all expenses/ supplier payments (which are out of the Kofax scope), utility/ maintenance bills, travel cards, etc.**

# Integrated Solution Design



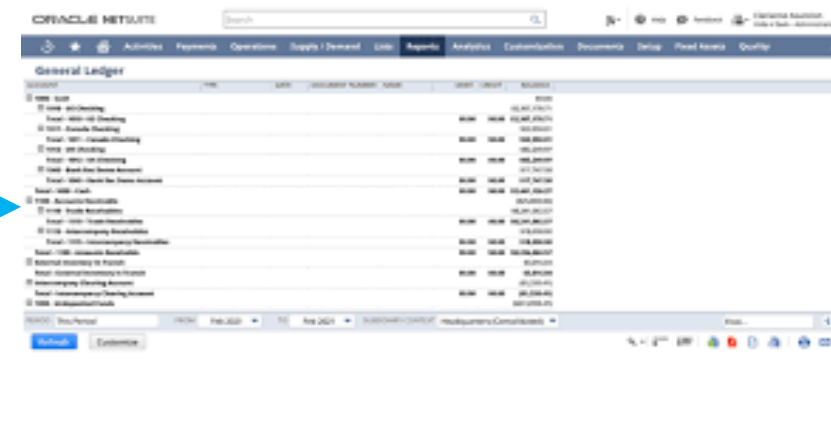
### Key areas

- Travel management (including safety and security)
- Expenditure management (including travel related, reimbursements, credit card, payment to vendors, etc)
- Ensuring compliance with organisational policies
- Ensuring compliance with duty of care/ better compliance with safety and security protocols
- Integration with NetSuite, Horizon & OCR,

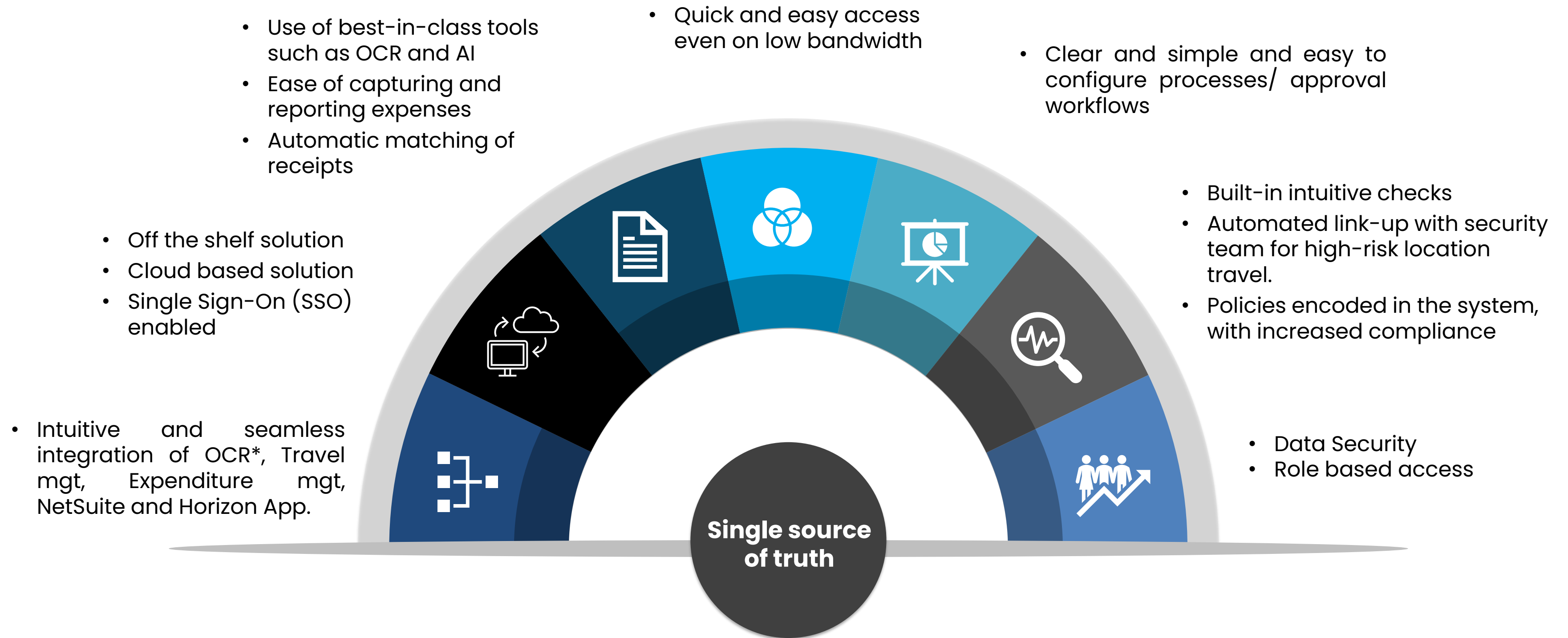


Seamless Data Integration

Seamless Data Integration



# Salient Features



\*Optical Character Recognition

# Expected Benefits to the Traveller

## Financial

- Easy calculation of advance required
- Prevents loss of receipts
- Reduced errors



## Efficiency

- Mobile access anywhere, anytime
- Smooth workflow
- Automatic budget and expense calculation
- No Rework or multiple emails needed
- Easy and Quick amendments
- Elimination of manual process



## Security

- Safest options for flights and accommodation selected
- Alerts and information on destination before and during trips
- Integration with the security team before departure and during travel.



## Quick Approvals

- Integrated workflow
- All information available at a single place



## Fair Travel

- Arranges Flight and Hotel Quotes
- Easy to search and select hotels and flights
- Easy application of fair travel policies
- Booking Hold



## Expense Reports

- Automates expense receipt management system.
- Reads uploaded receipts and updates report.
- Automatic matching with vendor invoices.
- Auto generated expense reports



# Expected Benefits to IPPF



**01 Productivity** : Travel becomes a seamless | Travel can be self-booked 24\*7

**02 Financial** : Less Bias | Transparent Selection Process | Less Rework, Faster Approvals & Reimbursements

**03 Policy** : Application of IPPF Policies in all aspects of travel | Audit visualization

**04 Duty of Care** : Security advice and escalation process for high-risk locations embedded in the system | Availability of Support 24x7

**05 Reporting** : Accurate & detailed data | Easy preparation of Dashboards & reporting on ESG guidelines | Common document repository from requisition to settlement

**06 Risk** : Easier consideration of safe and secure flight and hotel bookings while planning travel | Channel for requesting travel support

# Next Steps

