

TERMS OF REFERENCE

CONSULTANCY: DEVELOPMENT OF A DATA VISUALISATION DASHBOARD AND CAPACITY BUILDING FOR MONITORING AND EVALUATION

1. BACKGROUND INFORMATION/RATIONALE

1.1 Relevant background

The Caribbean Export Development Agency (Caribbean Export) is implementing results-based monitoring and evaluation (RBME) to measure key outcomes for women-led businesses in the Caribbean as part of the GRIT Project (Caribbean Women Entrepreneurs Generating Resilient and Inclusive Trade). A comprehensive baseline survey has been completed, generating rich quantitative and qualitative data across multiple indicators and disaggregated groups. To ensure robust, timely, and actionable monitoring, the project requires a dynamic dashboard solution to visualize, track, and report on its performance indicators and metrics.

1.2 Contracting Authority

The contracting authority for this assignment is the Caribbean Export Development Agency.

1.3 Beneficiary Countries

The primary beneficiaries under this project are the business support organisations and the private sector in the following CARIFORUM countries: Belize, Dominica, Grenada, Jamaica, Saint Lucia, and St Vincent and the Grenadines.

1.4 Target Groups

CARIFORUM private sector, business support organisations.

2. OBJECTIVE, PURPOSE & EXPECTED RESULTS

2.1 Overall Objective

To design, develop, and implement an interactive dashboard for project monitoring and reporting, and to build the internal capacity of project staff to maintain, update, and expand the dashboard independently.

2.2 Specific Objectives

Specifically, the consultancy aims to:

- **Identify and select an appropriate platform** in collaboration with the project team. This includes a thorough assessment of the current in-house tools and systems, evaluating compatibility, integration feasibility, and functional requirements. The selected platform should align with existing data workflows and enhance synergies with tools already in use within the organization.

- **Design and develop a customized dashboard** to visualize key performance indicators, baseline metrics, and results disaggregated by country, demographic group, and other relevant dimensions.
- **Automate data management processes** where possible, including data extraction, transformation, loading (ETL), and periodic updates to minimize manual data handling.
- **Develop clear user documentation and guidelines** to enable staff to update, adapt, and expand the dashboard independently.
- **Strengthen the knowledge and skills of project staff** through targeted, practical training covering dashboard maintenance, data modelling, and troubleshooting.
- **Ensure a smooth transition and handover**, including final testing, validation, and provision of technical support during the initial post-implementation period.

2.3 Purpose of consultancy and expected results

The purpose of this consultancy is to support Caribbean Export in designing and implementing an integrated, interactive, and user-friendly dashboard to effectively visualize, monitor, and report on project performance indicators and results. The consultancy will also strengthen the technical skills of Caribbean Export staff to ensure they can independently manage, update, and adapt the dashboard for ongoing monitoring, evidence-based decision-making, and stakeholder reporting.

The consultancy will result in the delivery of a fully functional dashboard that clearly displays the project's key indicators and baseline metrics, with the ability to filter and drill down by country, sector, indigenous group, and other relevant dimensions. Project staff will be provided with clear user documentation and hands-on training to confidently maintain, refresh, and customize the dashboard as needed. All source files, data models, and administrative credentials will be transferred to Caribbean Export to ensure long-term sustainability and reduce dependence on external technical support. Ultimately, the project team will have a dynamic, accessible monitoring tool that builds internal capacity, supports results-based management, and strengthens reporting and communication with partners and stakeholders.

3. ASSUMPTIONS AND RISKS AND MITIGATION

3.1 Assumptions

- The baseline survey data and any other relevant monitoring data are accurate, complete, and available in usable formats (e.g., Excel, CSV).
- Project staff have basic digital literacy and are able to participate in training sessions.
- Caribbean Export has access to the necessary software licenses (e.g. Pro or Premium) to enable development, publishing, and sharing of dashboards.
- Relevant staff will allocate dedicated time to participate in training and follow-up activities.

3.2 Risks

- The above assumptions are not actualised.

3.3 Mitigation

- Consultant to conduct initial data audit and advise on data cleaning or supplementation early in the process.
- Schedule training well in advance; record sessions; provide practical training materials and self-paced resources and include hands-on practice; develop simple step-by-step guides; offer follow-up Q&A or refresher session.
- Confirm licensing needs at the start; identify alternative solutions if needed (e.g., Power BI Service vs. Desktop).
- Train multiple staff and document procedures clearly; recommend appointing an internal dashboard “champion”.

4. SCOPE OF WORK

Under the direction and supervision of the **Lead – Partnerships, Advocacy and Reporting of Caribbean Export** and such other personnel who may be assigned, the Consultant/Expert will deliver the following services:

4.1 Specific Activities:

A. Dashboard Design & Development

- Review and analyse all baseline survey data, indicators, and reporting requirements.
- Recommend the most suitable data visualization tools such as Power BI or Tableau, among others.
- Design the architecture for a dashboard that:
 - Visualizes baseline, midline, and endline indicator data.
 - Enables disaggregation by country, age, business type, Indigenous group, disability status, or other relevant dimensions.
 - Provides drill-down and interactive features for exploring trends and gaps.
 - Includes key performance metrics, charts, maps, and custom visuals.
 - Supports exporting and sharing of visuals for reporting to stakeholders and donors.
- Develop the data visualization dashboard using best practices in data modelling, security, and visual design.
- Connect the dashboard to relevant data sources (Excel, SharePoint, cloud storage, or databases as applicable) to allow for continuous updates.

B. Documentation & User Guide

- Develop a simple, practical user guide explaining:
 - How to update data sources.

- How to refresh and publish the dashboard.
- How to create or adjust visuals and reports.

C. Staff Training & Capacity Building

- Deliver hands-on training sessions (virtual or in-person) for relevant staff (M&E, communications, programme officers).
 - Training must cover:
 - Basic dashboard concepts.
 - How to upload, clean, and transform data.
 - How to maintain and update the dashboard.
 - How to create new reports and visualizations.
 - How to interpret and present dashboard outputs for decision-making and reporting.
- Provide follow-up Q&A support for a defined period (e.g., 2 months) to ensure staff can confidently use and manage the dashboard.

D. Technical Support & Handover

- Conduct a final review and walkthrough of the full dashboard solution with the project team.
- Ensure full handover of files, datasets, source files, and admin access.
- Provide recommendations for future improvements or integration with other tools (e.g., Microsoft Teams, SharePoint, or donor reporting platforms).

E. Deliverables

1. Fully functional dashboard with connected data sources.
2. Custom visuals and reports for agreed indicators and metrics.
3. User guide and technical documentation.
4. Training plan and delivery (incl. materials).
5. Post-training support for up to 2 months.
6. Final handover package.

F. Timeline

- Total duration: 8 weeks
 - Week 1–2: Requirements gathering & data review
 - Week 3–4: Dashboard design & development
 - Week 5: User guide & testing
 - Week 6: Training sessions
 - Week 7–9: Final adjustments, handover, and support

G. Reporting

The Consultant will work closely with the Lead – Partnerships, Advocacy and Reporting and provide weekly progress updates.

5. PROJECT MANAGEMENT AND REPORTING

5.1 Responsible Body

Caribbean Export Development Agency

5.2 Management structure

The Executive Director will retain overall responsibility for the overall project. Day-to-day supervision of this specific programme is the responsibility of the Lead - Partnerships, Advocacy and Reporting, who will communicate progress to the Executive Director.

5.3 Reporting

A monthly progress report outlining key activities undertaken, progress made, and results achieved, must be submitted to the Lead - Partnerships, Advocacy and Reporting.

6. LOGISTICS AND TIMING

6.1 Commencement date and period of implementation of tasks

The expected term for this consultancy is 5 months.

7. PAYMENT TERMS

All services must be completed to the satisfaction of the Agency and payments will be contingent on submission and approval of the progress report and appropriate invoice. Payments will be made in accordance with the terms and conditions outlined in the contract between the contracting authority and the consultant.

8. REQUIREMENTS

8.1 Qualifications

- A Bachelor's degree in Computer Science / Software Engineering, Data Science or a related field.
- Certification in Data Visualisation or Business Intelligence Tools highly desired (PowerBI Data Analyst or Tableau Certified Data Analyst)

8.2 Expertise Required

- At least 5 years' experience in a similar capacity.
- Proven experience in designing and implementing dashboards such as Power BI or Tableau for M&E, international development, or donor-funded programmes.
- Strong data modelling and visualization skills.
- Experience in training staff in data visualization software and data storytelling.
- Familiarity with results-based management frameworks is an asset.
- Fluent in English.

8.3 Office Accommodation

Caribbean Export will provide a space in which the Consultant may work at the Headquarters office in Barbados.

8.4 Facilities to be provided by the Consultant

N/A

8.5 Equipment

N/A

8.6 Travel

Travel is not anticipated for this project.

9. REPORTS

9.1 Reporting requirements

A report at the end of each month outlining the key activities undertaken.

9.2 Submission and Approval of Reports

The reports and deliverables as referred to above must be submitted to the Lead - Partnerships, Advocacy and Reporting. All reports must be submitted in English in electronic format. The Executive Director is responsible for approving the reports.

10. EXCLUSION CRITERIA

Candidates will be excluded from participation in the bidding process if they:

- a) are bankrupt, insolvent, filing for insolvency or being wound up, are having their affairs administered by the courts, have entered into an arrangement with creditors, have suspended business activities or are in any analogous situation arising from a similar procedure provided for in national legislation or regulations;
- b) are the subject of proceedings for fraud, corruption, a declaration of bankruptcy, for winding-up, for administration by the courts, for an arrangement with creditors or for any similar procedure provided for in national legislation or regulations;
- c) have been convicted of an offence concerning professional conduct by a judgement which has the force of *res judicata*;
- d) are guilty of grave professional misconduct proven by any means which Caribbean Export can justify;
- e) are guilty of serious misrepresentation in supplying the information required by the contracting authorities as a condition of participation in the procurement process; they have been declared to be in serious breach of contract for failure to comply with obligations in connection with another contract with the same Contracting Authority or another contract financed with Caribbean Export's funds;
- f) are in breach of payment of taxes or social security contributions;

- g) have been convicted or are the subject of proceedings for money laundering, terrorist offences or activities, child labour, human trafficking, being a criminal enterprise in the production of goods and services, or any other irregularity;
- h) are established as or operating as a shell company.

A derogation from the mandatory exclusion clauses provided above, may be provided on an exceptional basis, for overriding reasons to entities operating in the public interest such as public health or protection of the environment.

11. MONITORING AND EVALUATION

The Consultancy will be monitored and evaluated by Caribbean Export over the duration of the project. Performance on the project will be measured by satisfactory completion and timely submission of the deliverables outlined in Section 5.3, and as outlined within the work plan submitted in the inception report. Feedback, other than acceptance, on each submitted deliverable is not a requirement for the continuation of the project. However, in some instances the Consultant may need to integrate any feedback into the subsequent deliverables. The Contracting Authority will provide feedback to the consultant within ten (10) working days of receipt of the final report.

12. SPECIAL REQUIREMENTS

None

13. PUBLICATION OF INFORMATION

To participate in any activity executed or supported by Caribbean Export, the Contractor hereby agrees that any information and personal data shared with and collected by the Agency will be processed for the purpose of reporting the outcomes and impact of the Contractor's projects and/or participation. Please note that Caribbean Export reserves the right to publish the Contractor's/Participant's name and address, the purpose and nature of the activity, and

financial arrangements, in accordance with Caribbean Export's Personal Data Protection Policy (<https://carib-export.com/about/compliance/personal-data-policy/>). Derogation from publication of this information may be granted if it could endanger the Contractor/Participant or harm his/her commercial interests.

14. DECLARATION

To participate in any procurement undertaken by Caribbean Export, all applicants must complete and submit to the Agency the Applicant Declaration Form (<https://content.carib-export.com/download/applicant-declaration-form/>).

15. SUBMISSION

Interested parties are kindly asked to submit proposals, which must include at least 3 examples of data visualization dashboards created within the last 3 years, together with a quotation for services in USD.

Submission should be sent to Edna Simpson, Programme Officer, Partnerships, Advocacy and Reporting: esimpson@carib-export.com copied to: jlaryea@carib-export.com. The deadline for submission is Wednesday 30th July at 11:59pm (AST).