

TERMS OF REFERENCE (ToR)

Upgrading Microsoft Dynamics System for Physicians Across Continents (PAC)

1. BACKGROUND

Physicians Across Continents (PAC) is an international humanitarian organization dedicated to providing medical and health-related services across multiple regions. Currently, PAC uses a Microsoft Dynamics system to manage its core operations, including finance, human resources (HR), procurement, and program management. While the existing system has supported the organization's workflows, there is a need to upgrade the system to enhance functionality, improve user experience, and support the organization's evolving operational and strategic requirements. The objective of this consultancy is to upgrade the Microsoft Dynamics system, introduce new features, and design a more intuitive and user-friendly interface that empowers employees, increases productivity, and improves organizational effectiveness. In addition to the existing modules, PAC requires the upgraded system to include comprehensive health facilities management and end-to-end supply chain management modules to better support our medical operations and resource distribution.

2. OBJECTIVES

The main objectives of this consultancy are:

System Upgrade:

Upgrade the current Microsoft Dynamics system to the latest stable version compatible with PAC's operational environment, ensuring improved performance, security, and compliance.

Feature Enhancement:

Introduce new modules and features to address existing gaps in finance, HR, procurement, and program management, ensuring streamlined processes and better reporting capabilities. Introduce modules for health facilities management and supply chain management.

User Experience Improvement:

Redesign the system interface to be more intuitive, user-friendly, and accessible to all employees, including those with limited technical expertise.

Integration and Scalability:

Ensure seamless integration with existing tools (e.g., email, document management, third-party applications) and design the system to be scalable for future organizational growth.

Training and Support:

Provide comprehensive training and post-upgrade support to ensure smooth adoption and effective use of the upgraded system.

3. SCOPE OF WORK

Phase 1: Assessment and Planning

- Conduct a thorough analysis of the current Microsoft Dynamics system and its usage across departments.
- Identify gaps, pain points, and user requirements through stakeholder consultations (including finance, HR, procurement, program teams, and IT).
- Develop a detailed upgrade plan, including timelines, risk mitigation strategies, and resource requirements.

Phase 2: System Upgrade and Customization

- Perform the upgrade to the latest version of Microsoft Dynamics, ensuring data integrity and system stability.
- Customize and configure the system to meet PAC's specific operational needs.
New Modules Development:

A. Health Facilities Management Module:

- Facility registry and profiles (hospitals, clinics, mobile units)
- Medical equipment inventory and maintenance tracking
- Facility utilization and bed management
- Patient flow and service delivery tracking
- Medical staff deployment and scheduling
- Health service statistics and reporting
- Compliance with health facility standards and certifications

B. Comprehensive Supply Chain Management Module:

- End-to-end medical supply chain tracking (from procurement to point-of-use)
- Inventory management for medical supplies, pharmaceuticals, and consumables
- Warehouse management with multiple location support
- Cold chain management for temperature-sensitive medical supplies
- Demand forecasting and stock-level optimization
- Distribution planning and route optimization for field operations
- Serial/lot number tracking for pharmaceuticals and medical devices
- Expiry date management and automated alerts
- Integration with procurement and finance modules

C. Enhanced Existing Modules:

- Advanced financial tracking and reporting tools
- Enhanced HR modules for recruitment, performance management, and employee self-service

- Improved procurement workflows, including vendor management and automated approvals
- Program management enhancements for monitoring, evaluation, and reporting

Phase 3: User Interface and Experience Design

- Redesign the system interface to improve navigation, accessibility, and visual appeal.
- Ensure the system is responsive and compatible with various devices (desktop, tablet, mobile).
- Implement user-friendly dashboards and reporting tools tailored to different roles within PAC.

Phase 4: Integration and Testing

Integrate the upgraded system with existing third-party applications and tools.

Conduct rigorous testing (unit, integration, user acceptance) to ensure functionality, performance, and security. Address any issues identified during testing.

Phase 5: Training and Knowledge Transfer

- Develop training materials, including user manuals, video tutorials, and quick-reference guides.
- Conduct training sessions for end-users and administrators.
- Provide knowledge transfer to PAC's IT team for ongoing system maintenance.

Phase 6: Deployment and Post-Implementation Support

Deploy the upgraded system in a phased manner to minimize disruption.

Provide post-implementation support for a defined period (e.g., 3–6 months) to address issues and ensure smooth operation.

4. DELIVERABLES

- Inception report with detailed assessment findings and project plan.
- Upgraded and customized Microsoft Dynamics system with new features.
- User interface design documentation and prototype.
- Testing reports and issue logs.
- Training materials and completion reports.
- Final project report, including system documentation and recommendations for future enhancements.
- Health Facilities Management Module
- Comprehensive Supply Chain Management Module

5. TIMELINE

The project is expected to be completed within **4–6 months**, depending on the complexity of the upgrade and customization requirements.

6. CONSULTANT PROFILE

The ideal consultant or consulting firm should have:

- Proven experience in upgrading and customizing Microsoft Dynamics systems for non-governmental or humanitarian organizations.
- Expertise in system integration, user interface design, and process automation.
- Strong project management skills and experience working with cross-functional teams.
- Excellent communication and training capabilities.
- Familiarity with the operational context of humanitarian organizations (preferred).

7. REPORTING AND COORDINATION

The consultant will report to the **Head of IT** or designated project manager at PAC. Regular progress updates and coordination meetings will be scheduled to ensure alignment with organizational goals.

8. BUDGET

Interested consultants are requested to submit a detailed financial proposal, including breakdowns for professional fees, software/licenses, training, and contingency costs.

9. SUBMISSION REQUIREMENTS

Proposals should include:

Technical proposal detailing the methodology, work plan, and team composition. Financial proposal with clear cost breakdown.

Portfolio of similar projects and client references.

CVs of key team members.

Submission Deadline: 15th April 2026

Submission Email: Procurement@physiciansac.org

10. EVALUATION CRITERIA

Proposals will be evaluated based on:

Relevance of experience and technical expertise (40%). Proposed methodology and work plan (30%).

Cost-effectiveness (20%).

Team qualifications and references (10%).

Contact for Clarifications:

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