



Terms of Reference (ToR) for Power BI Consultancy on Project Management Dashboards

1. Background

This document outlines the Terms of Reference (ToR) for Power BI training and consulting services. The goal is to equip participants with the skills necessary to design, automate, and use Power BI dashboards for effective project management and monitoring. By the end of the consultancy, participants will be proficient in building and using dashboards for real-time project tracking, performance monitoring, and reporting.

2. Objectives

The key objectives are:

- To understand Power BI's components and workflow in the context of project management.
- To create customized dashboards for tracking project progress and key performance indicators (KPIs).
- To automate data flows from Planner 1 to Power BI for real-time project monitoring.
- To ensure that each project component has a dedicated dashboard for effective oversight and reporting.

3. Scope of Services

The training and consulting services will include:

- **Introduction to Power BI for Project Management:** Understanding Power BI's ecosystem, components, and key differences from Excel.
- **Data Transformation and Analysis:** Learning how to clean, transform, and analyze Planner 1 data in Power BI.
- **Creating Gantt Charts:** Using project data to create and customize Gantt charts that track timelines and task dependencies.
- **Building Dashboards:** Developing dashboards for monitoring project KPIs, timelines, and milestones, with a focus on the 4 project components.
- **Automation of Data Updates:** Automating the integration of Planner 1 data into Power BI for continuous project tracking and reporting.
- **Sharing and Reporting:** Learning how to share dashboards with stakeholders and enable real-time collaboration.

4. Deliverables

The main deliverable of the consultancy is the **Power BI training**. Upon completion, participants will:

- Be capable of creating project management dashboards tailored to their specific needs.
- Understand how to automate data flows and update dashboards automatically.



- Have the ability to monitor project timelines, tasks, KPIs, and performance using Power BI dashboards.

The deliverables are as follows:

1. **Comprehensive Training:** Delivery of full training sessions covering all specified modules.
2. **Training Materials:** Provision of materials, including documentation and resources to help participants apply the learned skills.
3. **Post-Training Support:** Offering post-training support for any clarifications or guidance on Power BI usage for project monitoring.

5. Duration

The Consultancy will span over **4 weeks in February 2025**, with a structured agenda covering theoretical and practical sessions, along with hands-on practice.

6. Target Audience

The training is aimed at:

- Team members involved in project monitoring and decision-making.
- Technical staff tasked with implementing automated data workflows between Planner 1 and Power BI.

7. Consultant's Role

The consultant will:

- Deliver training modules as per the schedule, focusing on practical use cases and real-time project data.
- Customize training content based on the specific project management needs of the organization.
- Provide post-training support and ensure successful implementation of Power BI dashboards.

8. Submission of Proposals

Interested consultants are invited to submit the following documents along with their proposals:

1. **Technical and Financial Proposal:** Outline of the training methodology and a detailed breakdown of the costs.
2. **Detailed Activity Schedule:** A timeline outlining training sessions and topics.
3. **Curriculum Vitae (CV):** Highlighting relevant projects and experience.
4. **Professional References:** Contact details of previous clients for reference

9. Proposal Submission Deadline



Proposals should be submitted no later than 01.12.2024 and sent to Marina Bigerna
mbigerna@oroverde.de

10. Evaluation Criteria

Proposals will be evaluated based on:

- **Relevance of Methodology:** The alignment of the proposed methodology with the objectives of the training.
- **Experience and Expertise:** The consultant's track record in Power BI training and consulting, particularly in project management.
- **Cost-effectiveness:** A reasonable and transparent cost structure.
- **Customization:** The ability to tailor the training to the organization's specific needs.