

INVITATION TO TENDER

Independent Consultant Review of ChildData

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ITT Main Facts Table

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1. Background to Plan International

Plan International is an independent development and humanitarian organisation that advances children's rights and equality for girls.

We believe in the power and potential of every child but know this is often suppressed by poverty, violence, exclusion and discrimination. And it is girls who are most affected.

Working together with children, young people, supporters and partners, we strive for a just world, tackling the root causes of the challenges girls and vulnerable children face.

We support children's rights from birth until they reach adulthood, and we enable children to prepare for and respond to crises and adversity. We drive changes in practice and policy at local, national and global levels using our reach, experience and knowledge.

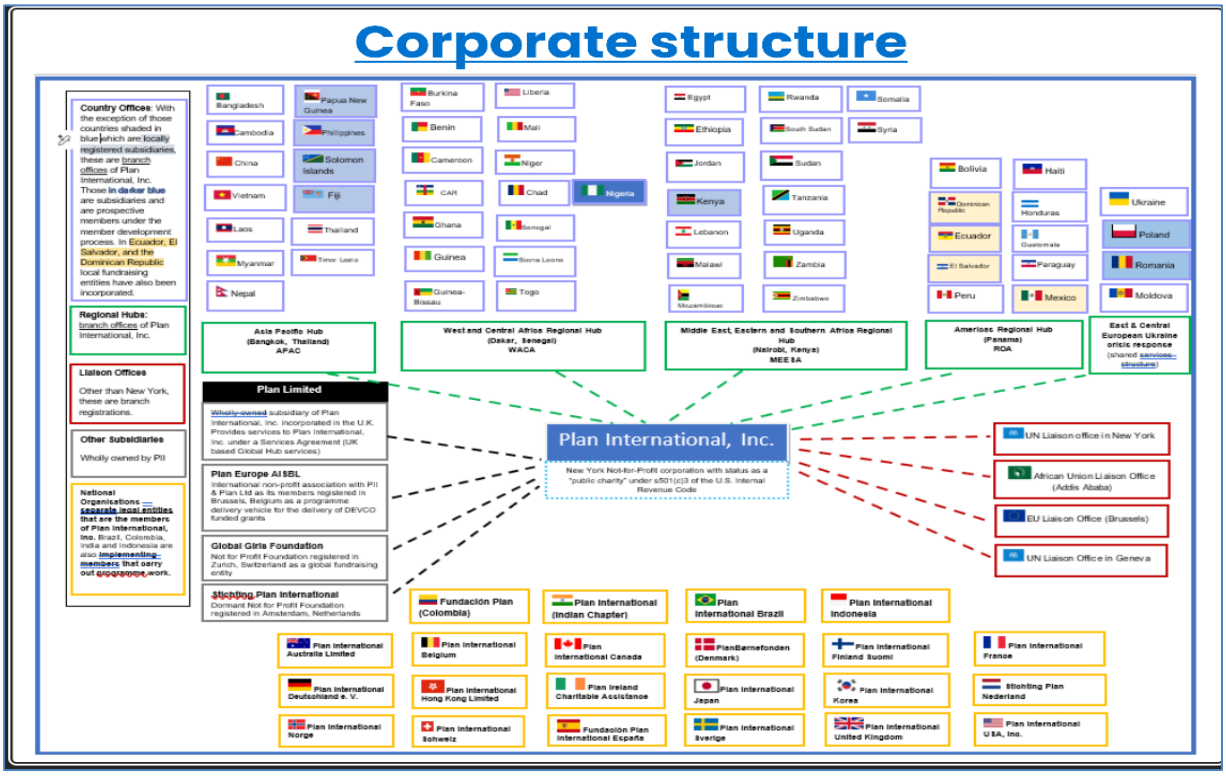
For over 85 years, we have rallied other determined optimists to transform the lives of all children in more than 80 countries.

We won't stop until we are all equal.

Read more about Plan International's Global Strategy: Girls Standing Strong

1.1 Organisational Structure

Plan International is comprised of Plan International, Inc., its subsidiaries (including Plan Limited) and their corporate members - 'National Organization's':



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Plan International, Inc. ("PII") is a New York not-for-profit corporation. This in turn wholly owns Plan Limited, based in the UK and through which the Global Hub is operated. PII is comprised of the following units:

- **The Global Hub:** The operational headquarters, providing strategic direction and technical assistance to the organisation
- **Regional Hubs:** Co-ordinate and support the work of each Country Office within its region, providing leadership and technical expertise
- **Country Offices ('COs'):** Responsible for all programme operations within their country
- **Programme Units ('PUs')**: Manage and implement our programmes on the ground, working directly with children and communities and working closely with partner organisations. They are most often located in the communities where programmes are implemented
- **Liaison Offices:** Provide a platform to strengthen our partnerships with international bodies, conduct negotiations with key decision-makers and promote the rights of children globally

National Organisations ("NOs") are separately constituted legal entities with objectives / purposes aligned with PII, and each with their own governance bodies. Their role is to raise funds, promote advocacy in country and in some cases, oversee programmes/projects due to donor requirements. Each National Organisation has agreed to comply with specific standards of operation set out in the Members' Agreement.

2. Background and purpose of the consultancy

ChildData is Plan International's global child sponsorship management system. Introduced in 2007 and enhanced since, it underpins child information management, sponsorship operations and sponsor communications.

Users	More than 2,000 direct users across Regional Offices, Country Offices, Programme Units, National Offices and the Global Hub.
Core Functions	Locations, child enrolment and annual updates (questionnaires), child status and lifecycle, caseload management (availability, pooling and quota for National Offices), sponsorship transactions from National Offices, correspondence and digital communications, sponsor document generation, reporting, and configuration at Country Office (CO)/Programming Unit (PU)/National Office (NO) level.
Technology	Microsoft .NET Framework web application and services, SQL Server databases, reporting services, batch services and file interfaces, hosted on virtual machines.
Data estate	Approximately 8-10 TB, largely photographs and documents.
Languages	Sponsor communications in more than 10 languages; user interfaces in English, French and Spanish.
Key integrations	National Office web services and file interfaces, digital data collection, identity, data warehouse and downstream systems.

The review is required because supporting technology is ageing, specialist skills are scarce, integration complexity and technical debt are increasing, and the platform constrains analytics, AI and prospective sponsorship operating models. The engagement will provide an independent, evidence-based recommendation to support an executive investment decision.

This is an advisory engagement. Implementation, detailed solution design, and procurement of replacement platforms or implementation partners are out of scope.

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3. Objectives and questions the review must answer

The appointed consultant will assess the current system, compare realistic future-state options and recommend a practical path forward. The review must answer:

1. Is ChildData fit for purpose for Plan's sponsorship operations today, and for future models (child sponsorship, community sponsorship, other private giving, and the future use of child and donor data)?
2. What are the risks of continuing with ChildData as it is (technology end of support, skills, dependency on an external vendor, security, cost), how soon do they materialise, and what interim actions are needed whatever the long-term choice?
3. What realistic options does Plan have (upgrade or modernise, re-platform, replace, hybrid, phased), and how do they compare on fit, cost, risk, time and organisational impact?
4. Which option is recommended, and what roadmap, decision gates and investment would deliver it?
5. What does Plan need to decide, prepare or procure next (requirements, sourcing and delivery model, organisational readiness) to act on the recommendation?

The recommendation must address current and future business fitness, technical and security risks, data and integration implications, costs, benefits, organisational impact, decision gates and immediate risk-mitigation actions.

4. Scope of work

4.1 Business process and functional fitness

This part of the review will establish how well ChildData supports current sponsorship operations and future business needs. It will bring together the process-level findings below to identify functional gaps, strengths and opportunities for simplification or standardisation.

- **Location management:** The consultant must review location management: the organisational and geographic hierarchy, community and location master data, and phase-in and phase-out of locations.
- **To-do and activity management:** The consultant must review to-do and activity management, including tasks and actions that drive timely work on children and correspondence.
- **Production and scheduling management:** The consultant must review production and scheduling management: the annual cycles and schedules for child updates, documents and other sponsorship outputs.
- **Questionnaire design and configuration model:** The consultant must review the questionnaire design and configuration model. This covers template structure, annual (financial year) versioning, and how finely mandatory and optional rules can be set by Country Office, Programme Unit and National Office.
- **Document generation and dynamic content:** The consultant must review document generation and its dynamic content logic, covering sponsor-facing documents (child introductions and annual updates) and sponsor and sponsored-child letters.
- **Multilingual content and translation management:** The consultant must review how multilingual content and translations are managed across the system and sponsor communications.
- **Configuration and permissions model (CO/PU/NO):** The consultant must review how business rules, configuration and permissions are set at Country Office, Programme Unit and National Office level.
- **Reporting and data extraction:** The consultant must review reporting and data-extraction functionality, covering operational reports, extracts for National Offices and feeds to analytics.
- **Caseload management:** The consultant must review caseload management, including how children are allocated to National Offices and sponsors (availability, pooling, quota) and the move towards dynamic caseload management.
- **Digital communication management:** The consultant must review how digital communications between sponsors and sponsored children are managed.
- **Child lifecycle and National Office transactions:** The consultant must review the core child lifecycle (enrolment, updates, status changes, cancellations and departures) and the sponsorship transactions that National Offices send to ChildData.

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- **Process simplification opportunities:** The consultant must identify where sponsorship processes could be simplified or standardised, whichever option is chosen, and say which improvements depend on a platform change.
- **Functional fitness assessment rating:** The consultant must state explicitly how fit each in-scope process area is (for example fit, partially fit or not fit for current and future needs), with supporting evidence.

4.2 Data, analytics and AI

This part of the review will examine whether ChildData's data foundations can support current and future sponsorship needs, analytics and realistic AI opportunities. It will also consider the feasibility and risks of moving data under the future-state options.

- **Data model assessment:** The consultant must assess whether the ChildData data model suits current and future sponsorship needs, covering structure, data quality, history and audit, and how data is split across databases.
- **Analytics readiness:** The consultant must assess how ChildData data can support Plan's data and analytics strategy, including feeds to the enterprise data platform, and identify the current constraints.
- **AI opportunities:** The consultant must identify realistic AI opportunities for sponsorship, such as data quality, translation and content generation, and what platform and data foundations each would need.
- **Data migration feasibility:** For each option, the consultant must assess how feasible data migration is, covering volumes, history, images, data quality and coexistence. The assessment must set out the main risks.

4.3 Technical architecture and technology

This part of the review will assess the sustainability of ChildData's architecture and technology, including its supportability, performance and capacity to meet future demand. The findings will inform both immediate risk mitigation and the comparison of future-state options.

- **Current-state architecture and risk audit:** The consultant must document ChildData's current-state architecture and technology and audit the risks: end-of-support exposure, technical debt, dependency on scarce skills, infrastructure complexity and cost, and supportability.
- **Technology lifecycle and end of support:** The consultant must confirm the support lifecycle of each ChildData technology component and the timescale of the risk if no action is taken.
- **Scalability and performance:** The consultant must assess whether ChildData can scale and perform at current and forecast volumes of users, children and transactions.
- **Alignment with Plan architecture standards:** The consultant must assess the current platform and each option against Plan's enterprise architecture principles, standards and technical strategy.

4.4 Integrations and National Office APIs

This part of the review will examine how ChildData exchanges information with National Offices and other systems, and how those connections would be affected by each future-state option. It will identify integration dependencies and implications for continuity of operations.

- **Integration inventory and assessment:** The consultant must assess all ChildData integrations: National Office web services and file interfaces, digital data collection, identity, document and reporting services, and feeds to the data warehouse and other downstream systems.
- **National Office API assessment:** The consultant must assess the APIs and services National Offices use to exchange data with ChildData, and how each option would affect National Offices and their own systems.
- **Enterprise integration fit:** The consultant must assess how each option fits Plan's enterprise integration approach, including the integration with digital data collection that is now being implemented.

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4.5 Security, data protection and governance

This part of the review will assess how ChildData protects children's and sponsors' information and supports safeguarding and accountable system governance. It will identify current gaps and the security, privacy and governance requirements that future-state options must address.

- **Security review:** The consultant must review ChildData's security controls and risks, covering identity and access, data protection in storage and transit, application security, logging and monitoring, and operational security. They must then define the security requirements each option has to meet.
- **Data protection and privacy:** The consultant must assess compliance with data protection requirements for personal and sensitive data about children and sponsors. This covers lawful basis, data minimisation, retention, archiving and deletion, data subject rights, cross-border transfer and hosting location.
- **Safeguarding:** The consultant must assess how the platform supports child safeguarding, both in controlling access to and use of children's data and in supporting safeguarding processes.
- **Data and system governance:** The consultant must review governance of ChildData (ownership, change control, configuration management and access governance) and recommend the governance any future option needs.

4.6 Future-state options and cost-benefit

This part of the review will bring together the business, data, technical and risk findings to compare realistic future directions for ChildData. The appraisal will provide a vendor-neutral, evidence-based basis for an investment decision, using the assessment framework agreed under Section 8.1.

- **Range of options:** The consultant must develop and compare a realistic range of future-state options, including at least retaining the current platform with risk mitigation, and upgrading or modernising it. It must also cover re-platforming onto a commercial or SaaS platform, a new custom build, hybrid combinations (for example a new user and process layer over the existing data layer), and phased transition.
- **Vendor-neutral assessment:** The options appraisal must be vendor-neutral and evidence-based. Where specific products are used as examples, the consultant must say so and give the basis for any product assessment. The assessment must comply with Section 8.1, including agreement of the methodology, evaluation criteria and assessment framework before specific solutions or platforms are evaluated.
- **Evaluation against Plan requirements:** The consultant must evaluate each option against Plan's requirements for the sponsorship platform, using Plan's existing requirements register as the starting point. They must validate it with stakeholders and help Plan prioritise it.
- **Cost-benefit analysis:** For each option, the consultant must provide indicative one-off and recurring costs (including total cost of ownership over a stated period), quantified benefits, risks, dependencies, timescales, and the effect on skills and the organisation.
- **Technical and functional dimensions:** The options analysis must address both technical modernisation and improvement of functions and business processes.
- **Market and peer insight:** The consultant should give insight into how comparable organisations (for example other child sponsorship and international NGOs) support sponsorship operations, and into the relevant market of platforms and delivery partners.
- **Lock-in and exit:** For each option the consultant must assess vendor lock-in, data portability and exit considerations.

4.7 Modernisation strategy and roadmap

This part of the review will translate the recommended option into a practical, phased roadmap for decision-making and transition. It will set out how Plan can move forward while managing current-system risks and preparing for any subsequent procurement, without undertaking implementation.

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- **Recommended strategy and implementation roadmap:** The consultant must produce a modernisation strategy and implementation roadmap for the recommended option, with phases, sequencing, dependencies, decision gates, indicative costs per phase, and the main risks with mitigations.
- **Transition and interim risk mitigation:** The roadmap must cover transition: coexistence with the current system, the data migration approach, National Office transition, and interim measures to keep ChildData safe and supported until it is replaced or modernised, including reducing dependency on the current external vendor and scarce skills.
- **Inputs to next-phase procurement:** The consultant must set out what Plan needs for the next phase: high-level requirements, the delivery model and sourcing approach. This must not extend into running that procurement.

4.8 Scope boundaries

The engagement is limited to independent assessment, options appraisal and high-level roadmap development. The exclusions below distinguish this advisory work from detailed design, implementation and procurement activities that would need to be undertaken separately.

- The engagement excludes implementing any replacement or modernisation.
- The engagement excludes detailed solution design. Architecture work is limited to what is needed to compare options and set the roadmap.
- The engagement excludes procuring replacement platforms or implementation partners.

5. Deliverables and acceptance

The engagement will be stage-gated. Each stage must be separately priced and linked to defined deliverables and acceptance points.

Deliverable	Minimum content / acceptance	Timing
Inception report	The consultant must deliver an inception report confirming the approach, detailed work plan, stakeholder engagement plan, information and access requests, risks, and any refinements to scope. Due within 2–3 weeks of contract start (Plan to confirm). Approved by the Project Steering Group. The inception report must set out the methodology, evaluation criteria and assessment framework for comparing future-state options. These must be agreed with Plan International before specific solutions or platforms are evaluated, in accordance with Section 8.1.	Within 2-3 weeks of start
Functional fitness assessment	The consultant must deliver a functional fitness assessment covering all functional processes in Section 4.1 against current and future sponsorship needs. It must include explicit fitness ratings supported by evidence, gaps and improvement opportunities.	Per agreed work plan
Current-state architecture and risk audit	The consultant must deliver a current-state architecture and risk audit covering Sections 4.2–4.5: data, analytics and AI; technical architecture and technology; integrations; and security, data protection and governance. Risks must be rated for likelihood and impact, with recommended mitigations, including those needed regardless of the future-state option.	Per agreed work plan
Future-state options and cost-benefit analysis	The consultant must deliver the future-state options and cost-benefit analysis under Section 4.6, using the methodology, evaluation criteria and assessment framework agreed with Plan International in accordance with Section 8.1. Recommendations must be supported by transparent evidence, assumptions, costs, risks and dependencies	Per agreed work plan

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Deliverable	Minimum content / acceptance	Timing
Modernisation strategy and implementation roadmap	The consultant must deliver the modernisation strategy and implementation roadmap under Section 4.7. Roadmap approval by Plan is a definition-of-success criterion.	Per agreed work plan
Executive recommendations	The consultant must present the final recommendations to the Project Steering Group and executive sponsors and support the executive review and sign-off. Includes an executive summary suitable for senior decision-makers.	Per agreed work plan
Risks and dependencies register	The consultant must keep, and hand over, a register of risks and dependencies for the recommended way forward. Definition of success: 'Risks and dependencies documented'.	Per agreed work plan
Quality and acceptance of deliverables	Each deliverable must be evidence-based, traceable to its sources, delivered in editable Microsoft Office formats, and accepted by Plan through a review cycle before it is final. Payment milestones are linked to accepted deliverables, in accordance with Section 12.1.	Per agreed work plan

All deliverables must be evidence-based, traceable to sources, supplied in editable Microsoft Office formats and accepted through Plan International review cycles. The final recommendations must include an executive summary and presentation to the Project Steering Group and executive sponsors.

6. Approach and methodology

- **Proposed methodology:** The bidder must describe its methodology for each phase: assessment design, current-state review, options development, executive recommendations and transition planning. The options-assessment methodology, evaluation criteria and assessment framework must be agreed with Plan International before specific solutions or platforms are evaluated, as required by the inception report provisions in Section 5 and by Section 8.1.
- **Stakeholder engagement:** The consultant must engage stakeholders across Global Hub, Regional Offices, Country Offices and Programme Units, National Offices, IT (applications, architecture, security, data and analytics), data protection and safeguarding, and procurement.
- **Use of existing material:** The consultant must build on Plan's existing material rather than re-document it: the requirements register, technical reference, architecture reviews and process documentation.
- **Minimal disruption to operations:** The approach must keep the burden on business-as-usual staff and the live system to a minimum.
- **Validation of findings:** The consultant must validate key findings and options with stakeholders (for example through workshops) before finalising deliverables.

Bidders should show how their approach will minimise disruption to business-as-usual operations, use existing material efficiently, validate findings with stakeholders and maintain a clear evidence trail from assessment to recommendation.

7. Project governance

- The consultant must report to the Project Steering Group through Plan's IT PMO project manager. This includes progress reporting every two weeks and attendance at decision gates.
- The consultant must keep risk and issue logs and manage any scope changes through formal change requests agreed by the project team and sponsor.
- The consultant must name an engagement lead who is accountable for delivery and is Plan's single point of contact.

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- The engagement must be stage-gated, with go/no-go decision points at least after inception and after the current-state assessment. Each stage must be separately priced and deliverable, so that Plan can confirm, adjust or stop before committing further.

Plan International expects a Project Steering Group, executive approvals and escalation, and coordination through the IT PMO. The precise governance membership and decision rights will be confirmed at inception.

8. Supplier capability and independence

- **Relevant experience:** The bidder must show experience of independent assessments and options appraisals for modernising or replacing business-critical legacy systems.
- **Sector experience:** The bidder should show experience with international NGOs and with large-scale sponsorship or donor management systems, including data models for children, communities and donors.
- **Technical breadth:** The bidder must show expertise in enterprise architecture, legacy Microsoft .NET and SQL Server estates, commercial CRM and SaaS platforms, integration, data migration, and data and analytics.
- **Data protection and safeguarding expertise:** The bidder must show expertise in data protection (including GDPR) and in handling sensitive data about children.
- **Proposed team:** The bidder must propose a named team with CVs covering engagement leadership, enterprise or solution architecture, business process analysis (sponsorship operations), data architecture, and security and privacy. It must also commit to keeping the team stable.
- **Languages:** The team must work in English. French and Spanish capability is desirable for engaging Country Offices.
- **Independence from the current provider:** The bidder must be independent of the organisations that currently develop or support ChildData. It must not be, or be affiliated with, the current ChildData development or support provider.

8.1 Independence, vendor neutrality and future procurement

The purpose of this engagement is to provide Plan International with an independent and evidence-based assessment of the future options for ChildData.

The Consultant must ensure that its analysis and recommendations remain objective and vendor-neutral. The Consultant must disclose any partnership, reseller arrangement, implementation capability, referral arrangement, commercial relationship or other interest associated with any technology, platform or solution considered during the engagement.

The methodology, evaluation criteria and assessment framework to be used for comparing future-state options must be agreed with Plan International before specific solutions or platforms are evaluated. Recommendations must be supported by transparent evidence, assumptions, costs, risks, dependencies and evaluation against the agreed criteria.

Appointment under this ITT will not provide the Consultant with any entitlement, preference or expectation of appointment to undertake subsequent implementation work.

Plan International anticipates that any material implementation arising from the recommendations will be subject to a separate competitive procurement process. Participation in this consultancy will not, in itself, prevent the Consultant from participating in that process.

However, any subsequent participation will be subject to appropriate management of conflicts of interest and potential unfair competitive advantage. Plan International reserves the right to implement proportionate measures to protect the integrity of any future competition, including information-sharing controls, separation of personnel, disclosure requirements and, where a material conflict or competitive advantage cannot reasonably be mitigated, exclusion from the subsequent procurement.

All relevant analysis, requirements, specifications, architecture outputs and other deliverables produced through this engagement will be owned by Plan International and may be made available, where appropriate, to participants in a subsequent procurement to support a fair and transparent competitive process.

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9. Consultant obligations

- The consultant must sign Plan's confidentiality (non-disclosure) agreement and a data processing agreement before receiving any information or system access.
- The consultant and all team members must comply with Plan's safeguarding policy for children and young people, including any vetting Plan requires for people who can access children's data.
- The consultant must access ChildData systems and data only through accounts and environments provided or approved by Plan. They must use anonymised or minimal data wherever possible and must not copy personal data outside Plan systems.
- The consultant must treat security vulnerabilities and other sensitive findings as strictly confidential and report them only through the channels Plan agrees.
- The bidder must describe its own information security controls (certification such as ISO 27001 or equivalent is desirable) and must report any security incident involving Plan information promptly.

Access to systems, source code and sensitive information will be subject to agreed confidentiality, data-processing, safeguarding and information-security controls.

10. Timeline

The indicative delivery schedule is set out below and will be confirmed before the ITT is issued:

Discovery and assessment	November 2026 to January 2027
Future-state options	February 2027
Final recommendations and executive sign-off	March 2027
Inception report	Within 2-3 weeks of contract start

The bidder must provide a detailed and credible work plan that identifies activities, dependencies, stakeholder inputs, stage gates and proposed acceptance dates.

11. ITT overview and instructions

Plan International invites interested parties to submit a proposal through a competitive process for the provision of independent consultancy services. The successful bidder will be expected to enter into a formal contract. Plan International reserves the right not to award a contract, to award to more than one bidder, or to amend or cancel the process.

- All bidders will be given equal and fair consideration.
- Each bidder, consortium member or subcontractor may submit only one offer.
- All tender communications and clarification questions must be sent to procurement@plan-international.org and quote the ITT reference.
- Proposals must be complete and received by the stated deadline. Late or materially incomplete submissions may be rejected.
- Women-owned businesses and organisations actively advancing gender equality and women’s empowerment in the workplace are especially encouraged to apply.

11.1 Key procurement dates

Activity	Deadline

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Issue of Invitation to Tender	**3rd November 2026**
Deadline for clarification questions	**10th November 2026**
Plan response to clarification questions	**16th November 2026**
Deadline for submission of offers	**25th November 2026**

12. Proposal and pricing requirements

The proposal must be structured against the requirements in this ITT and include:

- Understanding of the requirement and proposed outcomes
- Methodology by phase and deliverable
- Detailed work plan, timeline, staging and decision gates
- Named team, roles, CVs and availability
- Relevant examples and at least three client references
- Conflict-of-interest and independence declaration, including the disclosures and confirmation of acceptance required by Section 8.1
- Assumptions, dependencies and exclusions
- Fixed price per stage and deliverable, with day rates, effort by role and expenses shown separately
- Completed proposal submission checklist in Section 12.2, with proposal section or page references.

12.1 Commercial response

Pricing must be fixed-price and deliverable-based. Bidders must separately show professional fees, day rates, effort by role, taxes and expenses. Payment milestones will be linked to accepted deliverables. All pricing assumptions and dependencies on Plan International must be explicit. The financial proposal must state the total fixed price for the complete in-scope engagement, supported by the stage and deliverable breakdown, and identify any optional services separately. Unless otherwise stated, quotations should remain valid for 90 calendar days after the closing date.

12.2 Proposal submission checklist

Bidders must use the checklist below to confirm that their submission addresses the requirements of this ITT. Enter Yes, No or Not applicable in the confirmation column and provide the relevant proposal section or page reference. Explain any omissions, qualifications or items marked Not applicable. This checklist summarises, and does not replace, the requirements elsewhere in this ITT.

Proposal component	Information to include	Included / proposal reference
1. Understanding and scope	Understanding of the review objectives, intended outcomes and scope in Sections 2–4, including confirmation that implementation, detailed solution design and replacement-platform procurement are excluded.	
2. Methodology	Approach by phase and deliverable, covering business and functional fitness; data, analytics and AI; technology and architecture; integrations; security, privacy and safeguarding; vendor-neutral options and cost-benefit appraisal; and the modernisation roadmap.	
3. Stakeholder engagement and validation	Proposed interviews and workshops across the stakeholder groups in Section 6; use of existing documentation; validation of findings and options; and measures to minimise disruption to staff and live operations.	

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4. Work plan and availability	Activities, proposed start date, duration, milestones and acceptance dates aligned with Section 10; resource availability; dependencies and required stakeholder inputs; and stage gates after inception and current-state assessment.	
5. Deliverables and quality assurance	Explicit coverage of all deliverables in Section 5: the inception report, functional fitness assessment, current-state architecture and risk audit, future-state options and cost-benefit analysis, modernisation strategy and implementation roadmap, executive summary and presentation, and risks and dependencies register. Describe evidence traceability, quality checks, review and revision cycles, editable Office outputs and handover of working materials.	
6. Named team and governance	Named engagement lead and team, roles, CVs, effort and availability; coverage of the disciplines in Section 8; English capability and any French or Spanish capability; commitment to team continuity; and arrangements for fortnightly reporting, escalation, risk and issue logs and change control.	
7. Relevant experience and references	Comparable legacy-system reviews and options appraisals; evidence of the technical, sector, data-protection and safeguarding expertise in Section 8; and three client references.	
8. Independence and conflicts declaration	Confirmation of independence from the current ChildData development and support providers; disclosure of any partnership, reseller arrangement, implementation capability, referral arrangement, commercial relationship or other interest associated with any technology, platform or solution considered during the engagement, and any other actual or potential conflicts; proposed measures to maintain objective, vendor-neutral recommendations; and confirmation of acceptance of Section 8.1, including the conditions governing participation in any subsequent procurement.	
9. Security, confidentiality and safeguarding	Description of the bidder's information-security controls and any relevant certification or equivalent evidence. Confirm willingness to sign the confidentiality and data-processing agreements before information or system access, comply with safeguarding and vetting requirements, use approved access arrangements, minimise personal data use and report sensitive findings and incidents through agreed channels.	
10. Assumptions, dependencies and exclusions	Explicit assumptions, limitations and exclusions; information, systems access and staff time required from Plan; delivery risks and mitigations; and any qualifications or departures from the ITT requirements.	
11. Financial proposal	Total fixed price for the complete in-scope engagement and separate fixed prices for each stage and deliverable; any optional services identified and priced separately; professional fees, day rates and effort by role; taxes and expenses shown separately; and all pricing assumptions and dependencies. Propose payment milestones linked to accepted deliverables and confirm quotation validity of 90 calendar days after the closing date unless otherwise stated.	
12. Completed proposal checklist	Completed Section 12.2 proposal submission checklist, confirming inclusion of each item and providing the relevant proposal section or page reference. Explain any omissions or items marked Not applicable.	
13. Terms and policy requirements	Confirmation of acceptance, or explicit identification of any exceptions, to the consultant obligations, terms and ethical and environmental requirements in	

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	Sections 9, 14 and 15, including payment terms and ownership and sharing of deliverables and working materials.	
14. Final submission check	Completed checklist and all required proposal documents and attachments included; ITT reference quoted; and complete submission sent to the mailbox in the Main Facts Table by the stated deadline.	

13. Evaluation of offers

For evaluation purposes:

1) **Understanding and proposed approach** will assess the assessment methods and coverage of Sections 4.1–4.7, including stakeholder validation and the proposed approach to vendor-neutral options appraisal.
2) **Relevant experience and team capability** will assess comparable assignments and the proposed coverage of the specialist disciplines in Section 8.
3) **Deliverables and work plan** will assess proposed outputs, acceptance arrangements, sequencing, effort, availability, stage gates and delivery risk.
4) **Independence and objectivity** will assess the practical safeguards proposed under Section 8.1 after mandatory eligibility has been established. Across all evaluation criteria, the same feature will not receive duplicate credit. Proposals are being assessed for the quality of the proposed review, not for presenting a preferred replacement platform before the engagement begins.

Offers will be evaluated against predetermined criteria and weightings agreed before issue. Mandatory eligibility and compliance requirements will be assessed before weighted scoring. These include independence from the current ChildData development and support providers under Section 8, together with the disclosures and acceptance required by Section 8.1. A relationship disclosed under Section 8.1 will not, by itself, constitute grounds for rejection. Its implications and the proposed safeguards will be assessed against that section. A higher score elsewhere cannot compensate for failure to meet a mandatory requirement.

Draft criterion	Indicative evidence	Weighting
Understanding and quality of proposed approach	Response to scope, methodology, stakeholder engagement and validation	25%
Relevant experience and team capability	Legacy modernisation, architecture, business analysis, data, security, privacy and NGO/sponsorship experience	20%
Quality and practicality of deliverables and work plan	Stage gates, evidence trail, timetable, risk control and knowledge transfer	20%
Independence and objectivity	Practical safeguards for managing disclosed conflicts, maintaining vendor-neutral analysis and supporting transparent recommendations under Section 8.1; independence from current providers is assessed as eligibility, not awarded additional points.	10%
Commercial model and value for money	Fixed price by stage/deliverable, transparent effort and assumptions	25%

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For the weighted independence and objectivity criterion, independence from current providers is an eligibility condition, not a source of additional points. Scoring will assess the quality and practicality of the bidder's proposed safeguards for managing disclosed interests, maintaining vendor-neutral analysis and supporting transparent recommendations under Section 8.1.

Plan International may clarify proposals, request presentations or references, and conduct due diligence. Any presentation or reference check used in scoring will assess the published criteria rather than introduce additional criteria or weightings. Bidders invited to the same evaluation stage will receive equivalent instructions and opportunities. Award will be based on best overall value against the published criteria, not solely on lowest price.

14. Terms and conditions

- Bidders bear all costs of preparing and submitting their offers.
- The successful bidder and relevant personnel may be subject to due diligence, sanctions and safeguarding checks.
- Any attempt to obtain confidential information, collude with competitors or improperly influence the evaluation may result in rejection.
- Bidders must immediately disclose any actual or potential conflict of interest. The disclosure, vendor-neutrality and future-procurement provisions in Section 8.1 apply.
- Plan International may alter the procurement schedule, cancel the process or decide not to enter into a contract.
- Plan International's standard payment terms will apply (NET 30), subject to the final contract.
- All deliverables and working materials produced for the engagement, including relevant analysis, requirements, specifications and architecture outputs, will be owned by Plan International and may be shared, where appropriate, with participants in a subsequent procurement in accordance with Section 8.1.

15. Ethical and environmental statement

Bidders are expected to operate in accordance with Plan International's ethical, safeguarding, anti-fraud, anti-corruption, data-protection and environmental expectations. Organisations should establish environmental standards and good practices aligned with the principles of ISO 14001 and applicable legislation, and seek measurable reductions where their activities create significant environmental impacts.

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