

Terms of Reference: Design of EITI’s PowerBI dashboards)

The Extractive Industries Transparency Initiative (EITI) aims to enhance transparency and accountability in the management of natural resources. As part of this mission, EITI is seeking proposals from qualified consultants to redesign and style PowerBI dashboards and data visualisations, and to develop design principles for presentation of the EITI’s data visualisations.

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Project overview

The Extractive Industries Transparency Initiative (EITI) is seeking proposals from qualified consultants with expertise in PowerBI dashboard design to revamp several of the EITI's dashboards and develop a data visualisation style guide. The chosen Consultant should be reputable, trustworthy, technically proficient and have experience with delivering engaging dashboards that build upon user journeys to visualise data for public consumption. Knowledge of and experience with other data visualisation tools (e.g. Highcharts, Tableau, Flourish, Datawrapper, Infogram) is advantageous.

The project consists of three main components.

Component 1: Redesigning global dashboards

- Redesign two global dashboards (beneficial ownership transparency and systematic disclosure) to align with EITI's visual identity guidelines and website style.
- Explore options for integrating these dashboards seamlessly into dedicated webpages on the EITI website.¹
- Ensure ease of navigation and interaction for users, regardless of their familiarity with EITI or the subject matter, while communicating key aspects of the datasets required by EITI stakeholders and data users.

Component 2: Data visualisation style guide

- Develop a comprehensive EITI data visualisation style guide in line with the EITI's brand, outlining design principles for PowerBI dashboards and specific chart types.

Component 3: Styling country-specific dashboards

- Style a series of country-specific dashboards (e.g. Afghanistan, Cameroon, Nigeria) to showcase examples of EITI data use.
- Maintain consistency with EITI's visual identity guidelines and colour palette.
- Simplify the presentation of data to enhance user understanding, while communicating key aspects of the datasets required by EITI stakeholders and data users.

¹ If it is not recommended to integrate PowerBI dashboards directly within the EITI website, the consultant may propose alternative solutions to ensure the dashboard is easily accessible to website visitors, with a clear indication of cost implications. Note that the EITI currently uses Highcharts for data visualisations on EITI country pages.

Project deliverables

- Component 1: Redesigned [beneficial ownership transparency dashboard](#) and [systematic disclosure dashboard](#) (details below), including three rounds of revisions/comments from the EITI team.
- Component 2: A comprehensive EITI data visualisation style guide in line with the EITI's brand, outlining design principles for PowerBI dashboards and specific chart types. Up to three rounds of revisions from EITI team.
- Component 3: Up to 11 styled country-specific dashboards demonstrating EITI data use (details below). Final number of country-specific dashboards to be determined by the EITI team. Up to two rounds of revisions per dashboard.
- Options for integrating dashboards onto the EITI website (PowerBI, Highcharts).

The EITI's communications and data teams will set up a kick-off call with the consultant prior to beginning the exploratory/design work to align expectations regarding the process and deliverables.

Component 1

The first phase of this project involves redesigning and styling the [beneficial ownership transparency dashboard](#) and [systematic disclosure dashboard](#), so that these align with the EITI's digital visual identity and the EITI website's look and feel and visualise the data in a clear manner that cater to user needs. The purpose of these dashboards is to demonstrate global progress in implementing a specific aspect of the EITI Standard, namely beneficial ownership disclosure and systematic disclosure. The underlying data for these dashboards is updated about once a year and is derived from stock takes from country and policy leads at the International Secretariat.

The consultant should explore options for integrating the dashboard directly on the EITI website, for example via a dedicated section of the [beneficial ownership](#) and [systematic disclosure](#) webpages. In considering how the dashboards may be redesigned or reconfigured, we recommend that the consultant takes inspiration from the [ESTMA data portal, which uses PowerBI, and/or EITI country pages \(e.g. Ghana\), which uses Highcharts](#). It should be noted that the EITI has a PowerBI Pro subscription which has limited styling and branding options.

The consultant may also propose alternative options for presenting the dashboards, if it is not recommended to integrate these directly on the website.

The dashboards should be easy for users to navigate and understand, regardless of their knowledge of the EITI or beneficial ownership/contract disclosure. They should also be easy for the EITI's data team to update on a routine basis.

Component 2

The third phase of the project involves the development of a comprehensive data visualisation style guide that aligns with the EITI's brand. The style guide should outline basic design principles and rules for dashboards and specific chart types, to be used by the EITI International Secretariat

as a reference for developing and formatting data visualisations using PowerBI, Infogram and potentially other data visualisation tools. The guide can draw inspiration from the EITI's existing Infogram data visualisations, and may also consider [The Economist Visual Styleguide](#) as a reference.

The style guide should provide guidelines for:

- Chart elements (e.g. chart typefaces, chart sizes/dimensions for print and web, leader blocks, source text, etc.);
- Chart types (bar/column, stacked column, line, stacked line, column + line, scatter, dot plot, pie/donut, treemap, diverging bar, maps, heatmaps/tables);
- Colour palettes (including main, secondary and supporting colours, and colour order);
- Dashboard layout and elements.

Component 3

The second phase of the project involves styling a series of country-specific dashboards that showcase examples of EITI data use. These could include:

- [Afghanistan](#): Coal royalties
- [Cameroon](#): Off-budget oil revenues
- [Cameroon](#): Oil sales
- [Chad](#): Oil sales
- [Côte d'Ivoire](#): Oil/gas swaps
- [Ghana](#): Licensing
- [Ghana](#): Gold production
- [Iraq](#): Petrodollar disbursements
- [Nigeria](#): Oil sales
- [Mali](#): Licensing
- [Papua New Guinea](#): National oil company transactions

The above dashboards should have a consistent look and feel and apply the EITI's colour palette and visual identity guidelines. Furthermore, the consultant may offer suggestions for simplifying the presentation of the dashboard, including individual data charts and labels, to enhance user understanding of the information.

The country-specific dashboards may be rolled out in smaller batches, as agreed with the EITI International Secretariat team. Bidders should specify costs per dashboard, and the final amount of country-specific dashboards may be reduced depending on budget.

Design specifications

1. **Alignment with EITI visual identity:** All dashboards must adhere to the EITI's [visual identity guidelines](#) of the EITI and reflect the design principles of its [website](#). This ensures a consistent and coherent visual experience for users. While the EITI does not have specific visual identity guidelines for data visualisations, designers should draw inspiration from the layout, colour scheme and chart types used in the [2023 EITI Progress Report](#).
2. **Usability and accessibility:** Dashboards should be designed to be easily comprehensible, accessible and navigable for all users. Additionally, they should also be easy for the EITI data team to update on a routine basis.
3. **Consideration of PowerBI publishing options and elements:** The EITI International Secretariat uses a PowerBI Pro licence, which allows for a "publish to the web" (public) option, not an "embed to a portal" option. This provides an iFrame embed link or a link to share. It should be noted that not all visualisations available in the PowerBI library can be publicly shared using the "publish to web" option.

The consultant should specify specific dashboard elements to be incorporated into the redesign, such as plugins, market visualisations or custom visualisations. Preference should be given to using free PowerBi Certified Visualisation elements.

4. **Approval of additional data modelling:** Any suggested design that necessitates additional data modelling of the source data from the EITI International Secretariat's Data Team must receive approval before implementation.

Timeline

Component 1

The final and styled global dashboards should be delivered by the following deadlines:

- Beneficial ownership dashboard: **20 August 2024**
- Systematic disclosure dashboard: **20 August 2024**.

The consultant must also propose at least two options for the global dashboard designs, and account for three rounds of revisions/comments from the EITI.

Component 2

Components 1 and 3 should draw on the design principles that will eventually form the EITI's data visualisation style guide. This guide may be undertaken in parallel with Component 1. The draft style guide should be delivered by **20 August** and should accommodate three revision rounds.

Component 3

The dashboards included in Component 3 may be delivered on a rolling basis. However, at least two draft dashboards should be delivered by **20 August 2024**, while the remaining draft dashboards may be delivered no later than **13 September 2024**. The dashboards should accommodate at least two revision rounds.

Prior to beginning the exploratory and design work, the consultant will meet with representatives from the EITI's communications and data teams to ensure alignment of expectations and identify key audiences for the data visualisations.

Qualifications

The Consultant should be credible, trustworthy, and technically competent.

Shortlisted persons will be assessed based on the following criteria/requirements:

- Experience in designing and developing PowerBI dashboards;
- Demonstrated ability to produce comprehensive data visualisation style guides;
- Proficiency in integrating data visualisations and dashboards into website environments (e.g. Drupal);
- Knowledge of and experience with other data visualisation tools (e.g. Highcharts, Tableau, Flourish, Datawrapper, Infogram) is an advantage;
- Knowledge of the EITI and the extractive sector is an advantage but not a requirement.

- Experience in managing projects that require multiple rounds of revisions and stakeholder feedback;

To ensure quality and independence in the undertaking, the Consultant must, in their technical and financial proposals, disclose any potential or actual conflicts of interest. This section should identify any areas of work, including past, present or future consultancies related to the EITI, which might pose a conflict of interest. Please also describe strategies that you intend to use to minimize those risks.

Consultant selection process

A Consultant will be selected following a quality and cost-based selection procedure.

Consultants should submit:

- **A Technical Proposal**, outlining: (a) the experience of the firm / consultants, (b) the proposed methodology and work plan in response to the Terms of Reference (TORs) and (c) the key experts' qualifications and competence. The Technical Proposal should not include any financial information. Technical proposals containing material financial information shall be declared non-responsive.
- **A Financial Proposal** in USD, clearly indicating the cost for each component, as well as a total cost of the project overall.² The total cost should include a lump sum financial proposal of all costs associated, with applicable taxes. The daily rate for the Consultant fees should be clearly indicated. The Financial Proposal should be sent as a password protected PDF file. The passwords should not be sent - financial proposals submitted without the password will be considered non-responsive. The passwords will be requested following the assessment of the technical proposals.

Proposals must be delivered by email to SKasimova@EITI.org by close of **Thursday 27 June**.

The criteria for assessing the technical proposals will be based on the following:

- Experience of the Consultant relevant to the Assignment
- Adequacy and quality of the proposed methodology, and work plan in responding to the Terms of Reference (TORs)
- Key Consultant's qualifications and competence based on the Qualification requirements (see section on qualification requirements above)

The weights given to the Technical (T) and Financial (P) Proposals are: T = 70% P = 30%

Proposals will be ranked according to their combined technical (St) and financial (Sf) scores using the weights (T = the weight given to the Technical Proposal; P = the weight given to the Financial Proposal; T + P = 1) as following: $S = St \times T\% + Sf \times P\%$.

² The EITI reserves the right to proceed with all components or select specific ones based on budget considerations.

Background

About the EITI

We believe that a country's natural resources belong to its citizens. Our mission is to promote understanding of natural resource management, strengthen public and corporate governance and accountability, and provide the data to inform policymaking and multi-stakeholder dialogue in the extractive sector. By becoming members of the EITI, countries commit to disclose information along the extractive industry value chain – from how extraction rights are awarded, to how revenues make their way through government and how they benefit the public. Through participation in the EITI, more than 50 countries have agreed to a common set of rules governing what has to be disclosed and when – the EITI Standard. In each country that has joined the EITI, a multi-stakeholder group, composed of government, companies and civil society, supports implementation of the EITI Standard.

Website users

The EITI website (www.eiti.org) is powered by the Drupal 9 CMS. In 2023, it received more than 500,000 visits, with approximately 12,127 visits to our page dedicated to open data (www.eiti.org/open-data). While our website attracts users globally, it is most visited by users in the US (12%), UK (7%), France (5%), Senegal (4%) and Nigeria (3%). Our “bulk data download” feature, which allows users to obtain data on EITI disclosures and assessments in open format, was accessed more than 7,000 times.

Our policy pages on [beneficial ownership](#) (3,000 views) and [systematic disclosure](#) (1,000 views) are our primary interfaces for information on these topics. These pages introduce the topics and signpost resources to learn more. However, they do not currently demonstrate country progress in meeting EITI disclosure requirements on these topics. The EITI's data strategy (2023-2028) aims to make data more accessible and available to our audiences, and the integration of dashboards will support this objective.

Key audiences

The design of these dashboards will consider the following key users:

- **Partner organisations:** Some of the EITI's partner organisations are interested in monitoring the progress of all EITI countries on specific EITI disclosure requirements.
- **EITI implementing countries:** EITI Implementing Countries are interested in monitoring the progress of their country or region on specific EITI disclosure requirements.
- **EITI Board and donors:** Members of the EITI International Secretariat staff use dashboards to communicate global progress and showcase impact to the EITI Board or to donors.

EITI usage of PowerBI and other data visualisation software

EITI currently utilises PowerBI (Pro account), Infogram (Business account), and Highcharts for data visualisations on the website. The consultant will collaborate with EITI's existing subscriptions and adhere to any specific requirements.

Data sources: Data for these visualisations have a variety of sources, ranging from Excel and the EITI's API.