Balozi Co-operative Savings and Credit Society Ltd.

Invest in secure hands

20th February 2023

Dear Sir/Madam,

RE: RE-ADVERTISEMENT FOR A SHORT-TERM PROJECT MANAGER

Balozi Sacco is a non-WDT Sacco regulated by SASRA with its office in Nairobi. The Sacco has a membership of over 4000 and asset base of Ksh. 4.5B. The Sacco plans to replace its core systems (ERP, mobile and web portal platforms) with a new one which is yet to be determined thus in need of a Project Manager to provide technical and advisory support during the implementation of the project.

Objective

The Project Manager will be expected to walk the Sacco through the entire process, that is, from the planning stage to the operations and maintenance stage with emphasis on:

1. Understand the Sacco processes and workflows
2. Advise the Sacco on the best ICT solution for its current needs and envisioned growth
3. Propose a solution that meets obligations to members and complies to regulatory standards
4. Coordinate the vendor and the Sacco team as well as the overall implementation schedule.
5. Serve as the secondary point of contact with the vendor
6. Assist the Sacco team with change management communications and coaching.

Project Manager's firm

Balozi Sacco will only engage organizations with prior similar experience and whose key personnel are registered with an approved project management body to act as the Sacco's Project Manager.

Scope of work

1. Understand the current Sacco business processes and workflows including mission, vision and envisioned strategic growth.
2. Assist the Sacco to review the user requirements and propose changes in line with the Sacco's goals and future growth.
3. Assist the Sacco to prepare system requirements, advise on formulation/ prioritization of tasks and ensure that they meet current market standards.
4. Identify gaps, evaluate, and perform analysis in the Society's user and system requirements, prescribe remedies and align them accordingly before the project commences.

5. Identify gaps, evaluate, and perform analysis on the Society's ICT infrastructure. Advise the management on implementation of the best environment in consideration to the projected growth and Sacco goals.
6. Align project objectives with the Society's goals and ensure the objectives of the vendor is clear.
7. Assist the Sacco in developing a strategic data migration plan and implementing the best practices.
8. Assist Balozi in developing solicitation documents, identify any gaps, and make recommendations to ensure Sacco needs are well articulated in the solicitation.
9. Assist the Sacco to prepare guidelines for evaluation of vendors.
10. Assist Balozi Sacco in preparation and review of vendor contract/ service level agreement and ensure that they protect the Sacco interests.
11. Develop project management charter, project plans and methodologies based on best practice and industry standards for successful project delivery.
12. Facilitate the definition of the vendors project scope, service levels, user requirements and coordinate a project kick- off meeting.
13. Working with the vendor and the Sacco team to develop the project implementation plan and matrix.
14. Monitor, track, and report on project implementation activities to ensure adherence to project specifications and timelines.
15. Providing periodic updates on the project as per agile methodology.
16. Attending weekly ERP implementation meetings during the project.
17. Assisting the Sacco team to review, accept/reject implementation control points, deliverables and provide feedback. This will involve coming up with a change control framework entailing the change control board, change request, change orders and the change logs.
18. Undertake quality assurance role for the project.
19. Monitoring and communicating any identified project risks to both the Sacco team and the vendor.
20. Working cooperatively with the Sacco in implementing ICT/System policies, procedures, and directives called for by authorities such as SASRA, KRA and office of data protection commissioner (ODPC).
21. Working with the vendor to ensure the implementation is successfully completed. This may include reviewing the project issue logs with the vendor. Collaboratively assign a priority to each issue and identify the individual responsible for facilitating resolution.
22. Helping coordinate final acceptance process for each phase of the software development cycle, making sure they are accomplished on the specified time.
23. To sign-off on milestones achieved on each phase of the software development cycle
24. Working with the Balozi Sacco team to implement and foster formal change management initiatives associated with the project.
25. Helping to coordinate:
    i. Hardware configuration activities
    ii. Software installation activities
    iii. Staff training activities for all users
    iv. User acceptance testing

26. Working with the vendor to ensure that comprehensive documentations are availed to the Sacco:
    i. Detailed technical report – for use by the technical team
    ii. Detailed user manuals – for guiding the end-users
27. Helping to evaluate readiness of Balozi Sacco Staff to perform live process from training and change management perspective.
28. Working with the Sacco team and the vendor to outline go-live steps, requirements, and assignments.
29. Ensure that system transition / change / roll over process is done to minimize disruptions and guarantee integrity of the information.
30. Monitor and report post go-live systems performance and vendor support during the first 3-months to ensure stability.
31. Manage project risks, opportunities, and mitigation
32. The project manager will also perform all other duties and responsibilities assigned, related to management and coordination of the implementation of the new system.
33. Any other deliverables within the defined scope for the period of the implementation.

Deliverables and Outputs
a.   Contract document detailing scope of work
b.   Preparation and presentation of the system contract and service level agreement (SLA).
c.   Detailed project plan
d.   Report on functional user, system requirements and gaps analysis
e.   Report on Sacco system procurement process
f.   Project checklist with milestone markers and set timelines
g.   Report on user training and commissioning of project
h.   Detailed report on project closure and, hand over report
i.   Any other deliverable within the defined scope of work.

Tender Security
The Project Manager's firm will be required to place a bank guarantee of Ksh. 1,000,000/- (One million) for the duration of the contract.

Conflict of interest
The Project Manager's firm should not engage in activities that conflict with the interests of the Sacco.

Lobbying
The Project Manager's firm should not engage the vendors outside Balozi premises on matters regarding the Sacco's system or on any aspect related to this assignment that can create an appearance of conflict of interest. Failure to adhere may lead to cancellation of the contract and forfeiture of security made /payments pending.

Project Management team qualifications

The project management firm should have skilled key personnel in the following fields (proof must be provided):

- Bachelor's degree in computer science, information technology, engineering, or related field
- Certifications in project management e.g., project management professional (PMP), PRINCE2, Agile etc.
- At least 5 years' experience in project management in financial institutions/Saccos
- Possess degree in accounting and have accounting skills e.g., CPA 111, ACCA finalist etc.
- Mix of staff with the right skill sets to ensure smooth implementation of the project
- A commitment not to change the proposed key personnel without concurrence from the Sacco
- Prior experience as a project manager in systems initiation, implementation, and closeout or similar role

Duration of engagement

From the date of signing the contract to project commissioning in accordance with the project phases timeline as will be agreed (estimate 1 year).

Remuneration and Terms of payment

20% down payment on signing of contract and the balance pro-rated upon successful completion of project milestones as per the approved checklist and a 10% retention fee.

References

You are required to attach written proof of recommendation on similar project from at least 5 referees of which at least one must be a Sacco.

Criteria for evaluation

Description	Score
Attach certificate of incorporation	Yes/No
Attach current trade license	
Attach current tax compliant certificate	Mandatory documents **(Failure to attach any required document will lead to disqualification)**
Attach proof of latest projects completed for similar engagement	
Attach written recommendations from 5 referees for similar engagement	
Attach CVs and supporting documents for the key personnel	
Attach proof of registration of key personnel with an approved project management organization eg. PMI	

Mark awarding Criteria	
Proposal submitted meets the scope of work	20
Proof of 5 latest projects completed for similar engagement (2 marks for each)	10
Key personnel involved in implementation of the project meet the requirements	10
Tender security to be availed (Yes = 10 marks, No=0)	10

Cost = Cl/Cc x M.
Where,
    Cl is Lowest quote received
    Cc is the Quote of vendor being evaluated
    M is the total score for cost (30 marks)
	50

Total	100

Submission of proposal and quotation

Your proposal and quotation marked "SACCO system project manager" should be dropped in our tender box at the reception by 4.00 pm on Friday 3rd March 2023.

Note: Those who had quoted before need not to re-quote

Yours Faithfully,

Jorim Oyago
Chief Executive Officer