

TERMS OF REFERENCE

Consultancy

Adaptation and Implementation of an Open-Source Software (i.e. Civi-CRM) for the Membership Management System (MMS) for the Private Sector Federation (PSF)

1. PROJECT BACKGROUND

1.1. The Client

The Private Sector Federation - Rwanda (PSF) is a professional organization, dedicated to promoting and representing the interests of the Rwandan business community. It is an umbrella organization that groups 9 professional chambers, 75 member associations and over 10.000 registered businesses in Rwanda. It was established in December 1999, replacing the former Rwanda Chamber of Commerce and Industry.

PSF's mission is to represent and serve the interests of the entire private sector through advocacy, while at the same time providing timely and relevant business development services that lead to sustainable private sector led economic growth and development.

PSF exists to: Represent the interests of the private sector; dialogue with government on matters related to the improvement of business through the economic partnership forum and provide business promotion and development services.



PSF has registered major successes since its creation in 1999. Beyond a strong brand and membership base, PSF pioneered Business Development Services (BDS), registered wins in advocacy and played a strong national and regional role.

2. THE ASSIGNMENT

2.1. Context of the Assignment

PSF is currently in a process of re-structuring and reviewing its strategies and is appraising the adequate resources necessary to support key objectives and to ensure that it can respond to the changing needs of their members and to the increased expectations from stakeholders.

In order to be able to address the number of challenges, the Membership Management System (MMS) of PSF has come under review and its functioning and practicability is seen as an elementary and very important tool for the functioning of a modern Business Membership Organization (BMO).

The necessary modernization and professionalization of the MMS is achievable through the implementation of an adequate software and seen as an urgent step towards adjustments and improvements for PSF.

Through a process of reviewing different software options, the PSF leadership decided on a web-based, open-source software option, such as CiviCRM., or SugarCRM etc.

2.2 General Objective of the Assignment

The overall objective of the assignment is to develop and install an adequate Membership Management System for PSF.

2.3 Scope

The requirements of the development of the MMS for PSF are available in the ***Requirement Specification Document*** (RSD) available here (attached).

With consultations with PSF and other involved stakeholders, the requirements can be adjusted to the actual needs of the PSF.

In general, the assignment can be clustered in the following phases:

- 2.3.1 **Analysis and design phase:** Develop, based on the RSD, a detailed solution description document, that stipulates the detailed functional and technical specifications of the system (design, performance, scalability, system security, adaptability, manageability, technology, deployment and hosting concept, pricing, SLAs). The development and deployment phase will only begin after a sign-off of the detailed solution description.
- 2.3.2 A **project plan** has to be provided after the analysis and design phase.
- 2.3.3 **Development and deployment phase:** - of the MMS based on the requirements in the provided RSD.
- 2.3.4 **Implementation phase:** Milestones need to be identified in liaison with the PSF MMS-Project team (see below). Each milestone will be followed by a user acceptance test (UAT) – then moved on to the next milestone after approval by the PSF MMS-Project team.
- 2.3.5 **Testing phase:** At the end of the implementation phase an overall testing phase with UAT and system integration tests will be necessary until approval by the PSF MMS-Project team. The testing phase is only finished when all acceptance criteria of the RSD are signed off.

2.3.6 Organizing **training** for all users = PSF staff (Headquarters -ToT) so that all can work independently with the system

2.3.7 Organize **special training** for the PSF IT-staff in order to enable PSF to maintain the system independently.

2.3.8 Provide **support and maintenance** of the MMS during six months after the deployment of the MMS.

2.4 Decision-making and quality assurance:

Adjustments of timeframes as well as the approval of appropriate quality of the deliverables listed in point 3 need the joint decision of the PSF Project team. In order to ensure an efficient workflow and a coordinated process as well as a common understanding of the quality and content of deliverables, at the beginning of each of the phases above, the consultants and the PSF MMS Project team will jointly detail the main activities.

3 DELIVERABLES / OUTPUTS

The consultant/consulting firm is expected to deliver the following:

OUTPUT 1: Detailed Solution Description:

- Develop based on the RSD a detailed solution description document that stipulates the detailed functional and technical specifications of the system (design, performance, scalability, system security, adaptability, manageability, technology, deployment and hosting concept, pricing, SLAs).
- Provide and present a detailed project plan of the assignment with different stages / milestones of the development- and deployment phases.

OUTPUT 2: Adjust an open-source software (e.g. CiviCRM) for a MMS for PSF

- In close collaboration with the stakeholders and following the provided RSD, adapt and develop the MMS
- Deploy the MMS after approval of all identified milestones of the PSF MMS Project Team.

OUTPUT 3: Develop a Standard Operating Procedure (SOP)

- Develop a Standard operational procedure (SOP) for use of the MMS: The SOP shall entail in-depth and comprehensive step-by-step instructions.

OUTPUT 4: Training of Users (Staff of PSF) of the MMS and the IT-staff

- On-the-job training of PSF staff
- Provide maintenance training for PSF IT-staff
- Provide manuals for the training (overview of training units / sessions, objectives, expected learning outcomes, activities, etc.)

OUTPUT 5: System support and maintenance for 6 months

- System administration (updates, patches, helpline)

4 DURATION OF ASSIGNMENT

The assignment will be conducted in the period of February to April 2018 with a maximum of 30 working days. Provide support and maintenance for a 6-month period after the deployment of the MMS.

5 COORDINATION AND SUPERVISION

The consultant will report to the Project Leader of the PSF MMS-Project Team and work in close coordination with relevant staff of PSF, including the IT staff.

6 REQUIRED PROFILE OF THE CONSULTANT / LEAD CONSULTANT

The Consultant / Lead Consultant should fulfil the following qualifications:

- Experience in working with open-source software programs, like CiviCRM
- Experience in developing membership data bases
- Hold at least a first degree (Bachelor or Diploma) in Computer Science, Computer Engineering, ICT, Electronics and Telecommunication Engineering or in another ICT-related field, obtained from an institution that complies to ISCED standards.
- 10+ years of experience as Software System Architect, Software System Analyst, ICT Consultant / Project Manager of Chief Information Officer
- Experience in gathering and documenting business requirements, functional as well as technical specifications.
- Problem solving and critical thinking skills to diagnose problems and determine steps necessary to achieve an effective solution.
- Training and human capacity development experience.
- Ability to communicate effectively to users with only fundamental levels of computer understanding.
- Communication and interpersonal skills: Excellent English language skills

7. CONTACT

In case of questions regarding the assignment, please contact us via email (martinn@psf.org.rw). Please note that for a fair tender process, we only point to publicly available information.

8. TIMELINE & REQUIRED DOCUMENTS

Please hand in your complete offer (technical proposal, incl. project plan and financial proposal) in a sealed envelope by **22/02/2018 - 10:00 o'clock** (Time zone: CAT). All offers arriving delayed cannot be considered.

All offers should be sent to: PSF Headquarters, P.O. Box 319, Ave. Magerwa / KK 6 Gikondo, Kigali / Rwanda.