

**REQUEST FOR EXPRESSIONS OF INTEREST  
(CONSULTING SERVICES – INDIVIDUAL CONSULTANT)**

**KENYA**

**CONSULTANCY SERVICES FOR MANAGEMENT OF THE IMPLEMENTATION OF AN UNDERWRITING  
SYSTEM**

**Project ID No. P-Z1-H00-002**

**Grant No.: 5700155000951**

The African Trade Insurance Agency (“ATI”) is a multilateral financial insurance company that operates in 10 African countries. It has been set up to attract investments and facilitate trade by offering products that remove the political and credit risk from transactions within or with our member states. To that effect it has developed a range of products that are adjusted to the needs of its clients. As the volumes grow at a fast rate, time has come to move from a manual administration using spreadsheets and word documents and to implement an integrated state of the art IT application (“the system”) that will structure the data, the processes, the products, the reports and the roles of the team members.

The African Trade Insurance Agency (ATI) has received financing from the African Development Bank under the FAPA Grant and intends to apply part of the amount for this grant to payments under the contract for the management and supervision of the implementation of an Underwriting System.

**Objectives of the consultancy**

The objective of the assignment is to assist with the implementation management of the system and to ensure that the implementation is done properly. Implementation of the System commenced on 1<sup>st</sup> October 2013. The progress in implementation is continuous, but rather slow as the system needs customization.

**Scope of the work**

Specifically, the Consultant will provide the following services under this project:

Support of the project implementation

The project manager will support the team by:

- helping in fine tuning the specifications for the supplier
- participating in the coordination meetings
- giving advice with regards to the planning and the assessment of the progress
- work with the supplier to develop training materials for the staff and for the data administrator (including how to modify parameters in the system and technical reports)

Quality Assurance

The project manager is in charge of ensuring the management and the internal auditors of ATI that the implementation is done properly: including

- the original scope is respected
- the final version is well documented
- the users are using the system as intended
- the detailed technical specifications are sufficiently detailed
- the communication between users and supplier is sufficiently documented and leaves an audit track; bugs and requests for change are properly filed
- all decisions are validated at the appropriate level and well documented
- that tests are done according to the book

- the agreed methodology is respected
- there are documentation and training manuals that are sufficiently user-friendly
- the project progresses in a logical order and at an acceptable speed
- the data are well protected and the approvals in the system operate as they should
- a data administrator is fully trained in supporting data management tasks in the system and in creating reports.

#### **Key features of the project are:**

- Modular implementation: the application has been split in different modules and they will be implemented one after another, in order to learn from the experience with the first modules and have the time to prepare the detailed specifications for the next ones.
- Methodology: the system implementing firm uses a mix of MPI and Prince2
- Microsoft platform: all the modules have been developed on Microsoft

#### **1. The project so far:**

- The supplier delivers the system based on a new version of the Microsoft CRM software.
- The first modules have already been implemented and the team is using it. The system implementing firm is using an “agile development” methodology, where improvements are made on an ongoing basis without too much documentation. This is in line with ATI’s need, as we don’t have sufficient expertise and manpower to make detailed specifications,
- The first modules are related to business development, filing, management of credit limits, work organization and issuance of policies. In the next phase we will move to reinsurance, the interfacing with accounting, reporting. These modules will work on more structured fields where errors will materially impact the company.
- The whole project is financed by a grant and there is a strict deadline for the final delivery – 31-12-2015.. There may be a possibility to extend the deadline, but likely not for more than 3 months. This will be decided towards year-end, based on the progress report.

#### **Profile**

The work will be done by an Individual Consultant.

- based in Nairobi
- certification as project manager, preferably in PMI or Prince2
- extensive and successful experience with the implementation of large projects (references required) as project manager, including IT projects
- experience with financial institutions
- hands-on, good communication skills (listening, oral, written)
- pragmatic problem solver
- very structured approach
- flexible regarding availability
- if possible, experience with Microsoft platforms

#### **Duration**

- The mission will start as soon as possible and will continue till the end of 2015 and the estimated input is 3 months. There is a possibility that the mission will be extended, but for a limited period
- This is not necessary a full time job. There may be periods with limited work, and peaks that will require significant involvement.

#### **Applications will include the following:**

- CV and references
- Consultant’s availability
- Consultants’ academic qualifications
- Consultant’s knowledge in Underwriting Systems

- Consultant skills
- Consultant experience in Similar Assignments.

ATI now invites individual consultants to indicate their interest in providing these services. Interested consultants must provide information indicating that they are qualified to undertake this assignment (brochures, description of similar assignments, description of similar assignments, experience in similar conditions, evidence of appropriate skills, etc.).

Evaluation of the EOI will be based on the following evaluation criteria:

- (i) Consultants' academic qualifications;
- (ii) Consultant's knowledge in systems implementation;
- (iii) Consultant skills;
- (iv) Consultant experience in Similar Assignments;
- (v) Experience in similar environments involving systems implementation.

The method of selection shall be Individual Consultant (IC). The eligibility criteria, establishment of the short list and the selection procedure shall be in conformity with the African Development Bank's "**Rules and Procedures for Use of Consultants**" (May 2008 Edition, Revised July 2012, which is available on the Bank's website <http://www.afdb.org>)

Interested consultants may obtain further information at the address below during office hours **08:00 – 17:00**.

Expressions of interest must be delivered to the address below by **Friday, 23rd July 2015 at 14:00 hours** and mention **Project Manager for the implementation of the Underwriting System**.

George Otieno  
**Chief Executive Officer**  
**African Trade Insurance Agency**  
**5<sup>th</sup> floor, Kenya Re Towers, Upperhill**  
**PO Box 10620-00100**  
**Nairobi**  
**Kenya**  
**Tel: +254 272 6999 or +254 722 205 006/7**  
**Email: [procurement@ati-aca.org](mailto:procurement@ati-aca.org)**