 

**Farmer to Farmer East Africa**

**Volunteer Assignment Scope of Work**

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| **Summary Information** | |
| Country | Kenya |
| Assignment Code | KE63 |
| Country Project | Livestock Country Project |
| Host Organization | Jenga Kenya |
| Assignment Title | MFI banking software needs assessment, procurement and Installation |
| Preferred dates | October 2016 – February 2017 |
| Assignment Objective | Assist Jenga Kenya in identifying its banking system needs, procuring, training and managing the migration to the new core banking software |
| Skills Summary | Software development expert with experience in financial institutions’ systems and handling migration to core banking software |

1. **Background**

Jenga Kenya Community Based Organization was established in 2005 as a small, indigenous microfinance institution operating in Meru County. Jenga Kenya now has twelve full time employees led by the general manager who has considerable experience in the microfinance industry in Kenya. The headquarters are in Meru town and there are two field offices. There are about 2,500 clients out which over 1,600 are women; all spread over 4 counties of Meru, Isiolo, Laikipia and Tharaka Nithi. About 80 percent of these clients are small scale farmers.

Jenga Kenya seeks to migrate to a new core banking software which is efficient, secure and meets current and anticipated future banking needs. Jenga Kenya is currently operating MS ACCESS based system. This system has many limitations, is cumbersome and often results in the company resulting to operating a manual system. The core banking software will help the institution to effectively serve more clients especially those from remote areas mostly as a result of improved efficiency in operations.

For this reason Jenga Kenya has requested for a Farmer to farmer volunteer who will assist in assist them in identifying a system that meets the institutional banking and other business needs. From this, the volunteer, together with Jenga Kenya management shall develop terms of reference and a call for proposals from which they will evaluate the vendors and their proposed systems and select the appropriate system.

1. **Issue Description**

Jenga Kenya deals with many small transactions usually originating from small scale farmer groups in rural areas. Most of the transaction information is captured manually and then input into a central data processing center where they are keyed into the MS Access based system and a resulting transactional paper is printed and sent back to the groups. This regularly happens in a back and forth manner between the farmers’ groups, the Loan Officers, and the Head Office making the whole process time consuming, laborious and inefficient. This is because the current MS Access based system is limited in the reports it can generate and is not well suited for these kinds of operations. Another major limitation is lack of system security. This compromises the internal controls and increases operational risks. The system also lacks the capability to perform related accounting tasks.

It is for these reasons that Jenga Kenya seeks to procure and install a cost effective –core banking system for better internal controls, reporting, integration with other systems and ease of conducting business. It is expected that this will help cut down the period of transactional processes, reduce transactional and administrative costs as well as increase accuracy and timeliness of management information. The system is expected to take advantage of the adequate Global System for Mobile (GSM) coverage and the affordability of the mobile services to enhance information sharing between the field offices and the headquarters and also between the financial institution and its clientele.

**Host contribution**: Jenga Kenya will provide the necessary information to assist the volunteer identify the institution’s ICT needs. The institution will further set aside funds to procure a new system and a server. The institution will also avail staff who will work during the migration of data from the old system to the new one.

1. **Objectives of the Assignment**

The main objectives of this assignment is to guide Jenga Kenya in identifying its banking software requirements, develop terms of reference and a call for proposals, evaluate the vendors and their proposed systems and select the appropriate system for procurement. The F2F volunteer together with Jenga Kenya staff and the selected vendor will setup the new system and oversee the process of migration to the new system.

The volunteer will also play a key role in assisting JK to develop policies and procedures for effective operation of the system.

The assignment will be divided into two sections as the expert volunteer will start working with Jenga Kenya several weeks prior to arriving in Kenya

1. **Prior to arriving in Kenya:**

* Discuss with Jenga Kenya management and ICT team and assist in identifying and analyzing the organizations ICT needs.
* Together with the management, develop terms of reference and a call for proposals that Jenga Kenya will circulate to interested vendors.
* Evaluate the vendors and their proposed systems
* Assist Jenga Kenya in selecting the best system
* Interrogate the new system after set-up and work closely with the ICT staff and the vendor to ensure a smooth set –up.

All these will be done through regular communication with Jenga Kenya through Skype or any other platform.

1. **In-country activities:**

* Together with the vendor, conduct user training on the new system
* Testing, customization and ensuring user acceptance of the system
* Advice and assist in customization of management reports according to Jenga Kenya needs
* Oversee the migration to the new system
* Assist Jenga Kenya management to develop ICT policies and procedures.

1. **Anticipated Results from the Assignment**

The major anticipated result from this assignment will be the successful migration for an MS Access based system to a new core banking system. The new system will be expected cut down the period of transactional processes, reduce transactional and administrative cost, as well as increase accuracy and timeliness of management information. This will in turn increase the overall efficiency of the organization for greater customer satisfaction thus increasing the savings and loans portfolios. The anticipated deliverables from the volunteer assignment include:

* Clearly identified and analyzed ICT needs for Jenga Kenya
* Detailed terms of reference and a call for proposals that Jenga Kenya will circulate to interested vendors.
* Through a competitive process, identify a suitable vendor with the banking software that meets Jenga Kenya’s ICT needs
* The successful setting up of the new system and migration of data.
* A set of ICT policies and procedures to be used by Jenga Kenya
* Volunteer feedback
* Field trip report and expense report
* Outreach activity, a press release or a media event back in US

**D. Schedule Of Volunteer Activities Prior To Arriving In Kenya**

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| **Week** | **Activity** |
| Week 1 | 1. Work with Jenga Kenya management and ICT staff to understand the current system and identify the business and system needs 2. Discuss with Jenga Kenya’s management the current operating procedures, the current ICT system and the expectations. 3. develop a detailed terms of reference and a call of proposal for the procurement of the new system 4. Jenga Kenya circulates the terms of reference and call for proposal |
| Week 2 | 1. Assist Jenga Kenya to evaluate the vendors and their proposed systems. 2. Advice on the Selection the best vendor |
| Week 3 | 1. Communicate regularly with the ICT staff and the vendor to ensure a proper set-up of the new system. |

**E. Schedule of Volunteer Activities in Kenya**

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| Day | Activity |
| Day 1 | Leave US |
| Day 2 | Arrival in Kenya. The volunteer shall be met by a cab driver, who will have a placard bearing **CRS logo**, and who will wait at the arrivals section with the placard displaying the volunteer name. The volunteer will be driven to **a hotel in Westlands suburbs of Nairobi** which will be communicated prior to arrival. |
| Day 3 | Briefing meeting at CRS offices with CRS F2F staff to become fully briefed on logistics and itinerary of trip. Discuss anticipated outcomes and work plan, |
| Day 4 | Travel to Meru and meet the Jenga Kenya management; review the main objectives of the assignment and adjust the agenda for the coming days. |
| Day 5 & 6 | Together with the vendor, conduct system preparation, installation, a champions training on the new system |
| Day 7 | Day off |
| Day 8 to 9 | * Testing and customization of the new system, Ensuring integrity. * User acceptance |
| Day 10 to 13 | Oversee the migration from the Old system to the new one |
| Day 14 | Day off |
| Day 13 to 20 | Test run new system parallel with the legacy system |
| Day 21 | Day off |
| Day 22 -23 | work with the CEO and advice on ICT policies to be put in place |
| Day 24 | * Closing session with Jenga Kenya staff, share the main findings of the assignment, provide conclusions and recommendations. Q&A session. * Exit meeting between Jenga Kenya management and CRS F2F and travel back to Nairobi |
| Day 25 | Debriefing at CRS office with USAID Mission and CRS staff.  Complete Trip Report (TR), Complete out feedback from, Depart for the US |
| TBD | Outreach event when back in the US could include: presentation with a local group/organization, press release, media event and/or speaking tour. |

# Desirable Volunteer Skills

The volunteer must have the following qualifications and competencies:

* Formal qualification in in Software Development, software engineering or computer science.
* Proven experience in working with financial institutions in a decision making level in matters of ICT
* Proven experience in handling of migration to core banking software

1. **Accommodation and Other In-Country Logistics**

While in Nairobi, the volunteer will stay at AACC hotel or any other hotel identified by CRS and communicated to the volunteer prior to arrival. In Meru, the volunteer will stay either at the Three Steers Hotel. This hotels has self-contained rooms with hot water, electricity and internet connection. Internet is also accessible in the many internet cafes in town. Meru town lies in the heart of eastern province, on the northeastern slopes of Mt. Kenya. It is situated at 5000 feet above sea level, only five miles north of the equator. The population is 1,356,301 according to the 2009 population census. Meru town is a business, agricultural and education center for northeastern Kenya, and has reliable banking facilities. Nakumatt Stores is a hyper supermarket, which has most commodities the volunteer may require, and is situated along the main highway, close to the assignment site and hotels.

CRS will pay for hotel accommodation, and provide volunteer with per diems to cater for meals and other incidentals. The volunteer may get an advance which has to be cleared before departing Kenya. For more information, please refer to country information that will be provided.

1. **Recommended Assignment Preparations**

* CRS-F2F designs assignments with the assumption of some pre-departure preparation by the volunteer. Actual preparation time will vary based on the experience of the volunteer, as well as informational or training resources the volunteer has readily available. CRS relies on the volunteer to assess the tasks outlined in this SOW and to make his or her own judgment about how much and what kind of preparation is needed prior to arriving in Kenya.
* The volunteer should prepare materials for hand out which can be printed at CRS office in Nairobi before commencement of the assignment. Flip charts, markers, masking tapes can be obtained at CRS offices.
* CRS strongly recommends that the volunteer become familiar with CRS programs in Kenya, the livestock project description, other information in the briefing pack before arrival to Kenya

1. **Key Contacts**

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