

Terms of Reference

Pension MIS Consultant

Project:	Funding Facility for Economic Reform – KRG
Post Level:	Local Individual Consultant
Duty Station:	Erbil/Iraq
Period of assignment/services:	9 months
Estimated Starting Date:	January 2021
(Date when the selected candidate is expected to start)	

1. Background

UNDP in partnership with the Ministry of Planning of Kurdistan Regional Government (KRG) has introduced Funding Facility for Economic Reform (UNDP FFER-KRG) to support and ensure the implementation of the economic reform adopted by the KRG, one of the activities undertaken by UNDP FFER-KRG is to support the General Directorate of Pension (GDOP) at the KRG to reform and modernize the system of Pension Administration.

The General Directorate of Pension (GDOP) provides services to Pensioners through (14) Directorates of Pensions (DOPs) which are located across the Kurdistan Region. In this framework, UNDP FFER-KRG is supporting the GDOP to develop and implement a modern management information system. The Public Pension Management Information System (PPMIS) intends to transform the current business operations from what is currently a redundant and highly manual environment, to a new environment where key business processes are centralized, more automated, and where a single integrated system is in use.

The development of the PPMIS reached the final stage, and it is envisaged that GDOP and all (14) DOPs will start applying the system in 2020. However, GDOP foresees numerous challenges in supporting staff to effectively adapt and properly use the new system. The staff at GDOP and all the (14) DOPs have long been accustomed to manual calculations and paper-filing systems, thus, to ensure a smooth transition to the PPMIS, at least (240) staff members at the GDOP and the (14) DOPs will require training on using various modules of PPMIS, including: checklist verification, data entry, reports generation, using dashboards, generation of tracking codes, printing ID Cards, benefits calculation, scanning dossiers, case transfer to other departments, auditing, etc.

Technical assistance will be a key element for upgrade actions required during the first (6) months of the rollout and implementation plan. Therefore, UNDP FFER-KRG is recruiting the Pension MIS

Consultant as local consultants to provide a high-end support, technical assistance, and contribute in the layout design, and planning of the rollout of the PPMIS through conducting comprehensive online and on-the-job training courses, besides sharing platforms to provide remote support due to the overwhelming consequences of the COVID-19. The Pension MIS Consultant will participate in the strategic plan to provide services to the GDOP key personnel, and to ensure the sustainability of the project. He/she will directly participate in the process of knowledge management and building capacity.

The GDOP currently has (260,000) records of pension accounts, the existing records suffer a high level of deficiency. During the process of PPMIS data migration, less than 10% of the required information was available, the GDOP uses unconsolidated methods for gathering information and storing data, the GDOP is receiving (overwritten) updated versions of pensioner accounts from the (14) DOPs on monthly basis, each DOP is using a different method of data management, including Excel, MS-Access and other flat files. In order to ensure data consolidation and integrity the GDOP will require to conduct a process of data consolidation and integrity to validate the existing data. The Pension MIS Consultant will determine the essential information that need to be entered into PPMIS, provide training and continuous support to the Data Entry and Verification Clerks who will be assigned by the GDOP, in addition the hired Consultants will prioritize and highlight the specific data fields that must be entered into the PPMIS in order to obtain the required outputs such as benefits calculation and pay-slips generation, the local Consultant will help in the assessment of the current infrastructure and configuration management of assets, at the same time they will teach the IT staff at GDOP and DOPs to manage the configuration of the equipment.

2. Scope of Work

Under the direct supervision of the UNDP FFER-KRG Project Manager, the Pension MIS Consultant will play a major role in the process of implementation and rollout of the PPMIS, he/she will work in liaison with the PPMIS key personnel at the GDOP, DOPs, and the System Administrator to achieve the strategic objectives, and support building human capacity at the GDOP and all (14) DOPs. He/she will layout a contingency plan to address the possibility of conducting online training and provide remote support in case of movement restriction or emergency situations due to COVID-19. Along with the PPMIS implementation, the hired Consultant will supervise and manage the process of data verification and consolidation for the existing (260,000) pension records, provide required training courses, and assist in the process of monitoring and data analysis, required tasks, roles, and responsibilities include:

The Implementation and rollout of the PPMIS:

In the context of the PPMIS implementation and rollout plan; the Pension MIS Consultant will act as the major focal point among the key stakeholders at the GDOP and DOPs to achieve the following activities:

- 1- **Plan training contents:** Design contents of the training modules that specific people must receive at the GDOP and DOPs.
 - a) DOP Level: At least (200) staff members will require training on various modules including: checklist verification module, data entry and benefits calculation, generation of payroll and pay-slip, printing ID cards, scanning documents and archive module.
 - b) GDOP Level: At least (40) staff members will require training, the training contents must cover: case auditing module, loans calculations, work history and service backlog determination, obtaining approvals and printing pensioner card.
 - c) System Admin: Special contents on technical tools and techniques such as T-SQL for querying data and developing stored procedures, system configuration, accounts creation, monitoring system performance and availability in addition to creating customized reports.
- 2- **Provide online training courses:** The hired Consultant will provide online training courses, due to the movement restrictions resulting from COVID-19; the Hired Consultant will provide online training courses to the GDOP and the DOPs through online platforms such as Zoom, Prezi, or Microsoft Teams, the Consultant will assist the trainees in the process of online subscription and creating accounts.
- 3- **Provide on-the-job training:** Upon the end of the emergency situation resulting from COVID-19 and getting the ease of access to other governorates and districts, the hired Consultant will schedule periodic travel plans to visit all the (14) DOPs, meet with the key personnel and system users and provide face-to-face and on-the-job training as required.
- 4- **Knowledge management:** To ensure project sustainability, the hired Consultant will:
 - a) Provide technical support on daily basis using online platforms to enhance communications and answer questions related to the PPMIS.
 - b) Gather feedback from the key personnel at the GDOP and the (14) DOPs, communicate with the developing company in case of finding system bugs, and keep logs of configuration changes.
 - c) Ensure the availability of the required documentations at the GDOP and all DOPs, these documents might include lessons learned during the implementation.
 - d) Sharing incident and problem management logs among all DOPs, to be used as future references.
- 5- **Plan project timeline:** Given the large number of DOPs that need to be trained, the Consultant will develop a project timeline to indicate milestones and monitor the performance and the implantation progress, the plan should also address how lessons learned in phase-1 can be applied to the trainings to be conducted in phases 2-3. Finally, the plan should give a timeline for providing ongoing support for a 4-month period following the conclusion of training to ensure absorption of the training. The plan will divided into:

- a) Phase-1: will cover the GDOP, and (4) DOPs including: Erbil-1, Erbil2, Sulaimanyah, and Dahuk.
 - b) Phase-2: will cover (5) more DOPs Garmian, Rapareen, Halabja, Zakho and Soran.
 - c) Phase-3: will cover (5) more DOPs including Aqre, Koya, Chamchamal,
 - d) Phase-4: will cover DOPs of Peshmerga in Erbil and Sulaimanyah to handle the military pension plan.
- 6- **Ensure equipment is in place:** Before conducting trainings, the hired Consultant will supervise the process of infrastructure assessment and equipment upgrade at the (14) DOPs, to ensure the installation of the required equipment including computers, printers, scanners, and ID card printers, in addition the Consultant will coordinate with the GDOP to ensure providing solid connectivity, and providing adequate internet bandwidth at each DOP.

Data integrity and Consolidation:

The Pension MIS Consultant will manage the process of data verification and consolidation for the (260,000) existing pension records, in collaboration with the key personnel at the GDOP and the (14) DOPs, the hired Consultant will supervise the progress of daily activities, provide monitoring and evaluation services, use tools and techniques to ensure a high level of data integrity. The process of data verification and consolidation will be achieved by Data Entry and Verification Clerks who will be hired for this purpose:

- a) Design project layout and outline the major tasks and activities to be achieved by Data Entry Clerks,
- b) Provide online and on-the-job training courses to the Data Entry Clerks, explain the system workflow and the major fields that require special attention during the data verification process.
- c) Guide the process of data verification, this includes the mechanism to handle pensioner dossiers, and labelling the pensioner dossier using PPMIS Pensioner ID for archive purposes.
- d) Develop a timeline table to identify the millstones and deliverables. The estimated timeline is (12) months, the hired Consultant will manage the timeline upon the available resources.
- e) Provide data analysis services, including running validation queries on daily basis to determine and examine the level of deficiency in the existing data, develop and share dashboards with the management at the GDOP.
- f) Compare payroll obtained from PPMIS to the payroll generated manually from the old systems such as MS-Access and Excel, during the first (4) months of the implementation plan, both the PPMIS and the current system “manual” will be managed together in parallel, this will provide ultimate test to ensure accurate results.
- g) Upon the workload at each DOP, the hired Consultant will determine the number of Data Entry Clerks required at each DOP, who will verify the existing pension records at each DOP.
- h) Other - Perform other relevant tasks and activities assigned by FFER-KRG Project Manager.

3. Expected outputs and deliverables:

- Direct and Supervise Governorate Database Officers to ensure required technical support is provided to Erbil, Sulaymaniyah and Duhok Governorate DOPs for the implementation of the rollout plan, support with delivering training on PPMIS to required staff, and provide on-job training to staffs.
- Coordinate with UNDP procurement Unit for the arrangement of the trainings.
- Prepare monthly report on the progress of the PPMIS implementation in GDOP and all DOPs.

4. Time and Method of payment

The Pension MIS Consultant shall be paid on a monthly basis for those days worked during a month assuming the UN-standard of 8.5 hours per day. Payments will be processed at the end of each calendar month for the actual number of days worked in that month. For each payment a timesheet needs to be submitted to project manager for approval.

5. Reporting:

The Pension MIS Consultant shall report to FFER-KRG Project Manager. The Pension MIS Consultant will be provided with office space and internet connection at Pension General Directorate in Erbil.

6. Travel Plan:

#	Country/ City	Number of Mission	Mission Days	Total Mission Days
1	Iraq/ Slemani	3	5 days	15 Days
	Iraq/ Slemani – Rapareen District	1	5 days	5 Days
	Iraq/ Slemani – Garmian	1	5 days	5 Days
	Iraq/ Halabja	1	5 days	5 Days
2	Iraq/ Duhok	3	5 days	15 Days
	Iraq/ Duhok - Zakho	1	5 days	5 Days
	Iraq/Erbil – Koya	1	5 days	5 Days
	Iraq/Erbil – Soran District	1	5 days	5 Days
Total		12		60

7. Contract Duration:

The assignment is for a 9-months period, starting from the date as specified in the contract.

8. Qualifications and Requirements:

The Pension MIS Consultant will require the following qualifications, experience, competencies and language skills. Only applicants who meet these criteria will be short-listed and will be contacted.

Education and Professional Qualifications Required:

Bachelor's Degree in information technology, Computer Science, Engineering or a relevant MIS - field.

Experience Required:

- Minimum of 8 years extensive experience in Management Information System and IT Field.
- Should be a certified trainer and has delivered training on MIS or IT for at least (5) years.
- Minimum 5 years of experience in supporting Government Offices with the MIS implementation.
- At least (3) years of experience in conducting capacity assessment
- Previous experience in developing implementation/rollout plan for MIS.
- Minimum (3) years of experience in activity coordination or projects management.
- Previous Experience in similar Pension System is an asset

Competencies Required:

- Excellent written and verbal communication skills
- Ability to engage in substantive technical discussion with stakeholders
- High analytical skills oriented towards problem-solving
- Leadership and self-management
- A focus on results and a willingness to accept critique/feedback from supervisors
- An energetic approach to work with a positive attitude
- An openness to new approaches for managing work complexity and unexpected issues
- Team spirit and excellent interpersonal skills
- The ability to model the UN's values and ethical standards, and to promote UNDP's and the UN's vision, mission, and strategic goals
- Sensitivity and adaptability to cultural, gender, religion, race, nationality, and age.

Languages Required:

- Fluent in English, written and spoken
- Fluent in Kurdish, written and spoken

9. Evaluation Criteria

The award of contract will be made to the individual whose offer has been evaluated and determined to be:

- a) Compliant and technically qualified;
- b) Achieving the highest combined score (financial and technical).

Criteria		Weight
<u>Technical</u>	Criteria A: relevance and responsiveness of candidate's past experience, qualification as presented in the Offer: <ol style="list-style-type: none"> 1. Bachelor's Degree in information technology, Computer Science, Engineering or a relevant MIS - field. (20 Points) 2. Minimum of 8 years extensive experience in Management Information System and IT Field. (20 Points) 3. Should be a certified trainer and has delivered training on MIS or IT for at least (5) years. (20 Points) 4. Minimum 5 years of experience in supporting Government Offices with the MIS implementation. (10 Points) 5. At least (3) years of experience in conducting capacity assessment (10 Points) 6. Previous experience in developing implementation/rollout plan for MIS. (10 Points) 7. Minimum (3) years of experience in activity coordination or projects management. (10 Points) 	70%
<u>Financial</u>	<u>Lowest Offer / Offer*100</u>	30%
Total Score = (Technical Score * 0.7 + Financial Score * 0.3)		

Weight Per Technical Competence	
5 (outstanding): 96% - 100%	The individual consultant/contractor has demonstrated an OUTSTANDING capacity for the analyzed competence.
4 (Very good): 86% - 95%	The individual consultant/contractor has demonstrated a VERY GOOD capacity for the analyzed competence.
3 (Good): 76% - 85%	The individual consultant/contractor has demonstrated a GOOD capacity for the analyzed competence.
2 (Satisfactory): 70% - 75%	The individual consultant/contractor has demonstrated a SATISFACTORY capacity for the analyzed competence.
1 (Weak): Below 70%	The individual consultant/contractor has demonstrated a WEAK capacity for the analyzed competence.