THE PRIVATE AGRICULTURAL SECTOR SUPPORT TRUST CONSULTANCY

FOR PROCESS MAPPING FOR THE PURPOSE OF PROCESS AUTOMATION TERMS OF

REFERENCE

1.0. Introduction

1.1. The Trust

PASS Trust is a facility established in the year 2000 with the mission to facilitate access to financial and business development services for agribusiness entrepreneurs in Tanzania – mainly small and medium size commercial farmers, farmer groups and agribusinesses (SMEs).

PASS Trust facilitates access to finance through technical support by offering a range of Business Development Services (BDS) in the form of, inter alia, feasibility studies and business plans for prospective bank clients, farmer group formation, farmer and agribusiness capacity development training, incubation programs and facilitation of contract farming.

1.2. Leveraging on Technology

a) In its five – year strategic plan (2018-2022) PASS Trust introduced an idea of digitalization of its products and services as a key priority, reflecting an ambition to respond to the fast-growing ICT connectivity of the Tanzanian population. With continued focus on the end-beneficiaries' needs, PASS intends to follow opportunities to use ICT to improve its internal efficiency and outreach.

b) This intent follows, among others, from the need for PASS to further explore the use of digitization - both to improve its internal organizational processes and operational efficiency and to improve its interface with clients.

c) The Trust envisages leveraging digital technology to:

1) Increase the operational efficiency through the automation of internal processes and implementation of new and/or upgraded digital systems.
2) Increase the outreach of its activities by introducing a Digital Credit Guarantee with a mobile application interface and business development services through the creation of a digital Knowledge Hub for MSMEs and agribusiness entrepreneurs.

d) The ultimate goal of the proposed automation is to achieve operational, procedural as well as financial efficiencies and rationality by reducing turn - around time in delivery of services, harmonizing procedures and reducing errors and fraud, operating on the digital platform.

1.3.   Pre – requisites for the Project

a) To effectively leverage on technology by automating the Trust's processes, it is crucial that we conduct an organizational process review and needs assessment, and then design the business processes and the business software of the Trust.

b) The Trust will provide to the Consultant all relevant documents related to the assignment.

c) This exercise should consider the wide set of key factors for improving the Trust's operational efficiency together with expected requirements to the organization/business processes/human resources from the planned digitalization of PASS' processes and products

2.0.   The Project

2.1.   Objectives

a) This project seeks to define the Trust's business processes as an essential input for the development of PASS Trust's IT system business software.

b) In the process, it will capture the current state of the business processes and report about it, and then develop the set of strategic and policy-based recommendations for the review of business processes.

c) The aim of the assignment is to assist the Trust to develop process maps for its key processes, use them to recommend improvement and to help the Trust re-align, strengthen and automate its key processes.

d) The consultant will also provide Technical Assistance to help the Trust develop process maps, conduct analysis of these maps so as to re-engineer those processes, update process maps accordingly and provide basis for automation of the Trust's operations.

e) The consultant will work with an officer of the Trust to accomplish the specific activities listed below.

2.2.   Key Tasks and Activities

a) Organize Project Kick-off Presentation – to ensure project awareness across the Trust, the Consultant shall organize one project presentation targeted at key personnel of the Trust.
b) Familiarize with the organization's business environment and strategy, operations and market context.
c) Review the existing documentation and particularly around process flows including process maps for core processes.
d) Consult senior management (the CEO, Business Departments, Finance and Administration) and determine key processes in the Trust,
e) Conduct a review of the key processes. This should be complemented by visiting branches and head office departments and meeting key staff (and clients) to better understand and observe practices on the ground.

f) Document the As-Is Process – map and analyse current business processes including its roles and responsibilities, institutional structure and staffing. Provide an in-depth and critical analysis of the process maps, looking for deviations from stated policies, potential risks or control deficiencies as well as duplications/unnecessary steps and overall process inefficiencies.

g) Prepare Should - Be Process – map. Provide a proposed flow in key processes, including a detailed description of the Trust's business objectives, roles and responsibilities.

h) Document the Business Process Design – map and document the process using appropriate business process design tools, methods, techniques and notations. Design structures and processes of the Trust in order to deliver high standards of service, achieve process efficiency, eliminate duplications and clarify the Trust's roles and responsibilities towards other organisations.

i) Prepare Gap analysis – Analyse the current and proposed business processes, discuss options for bridging the gap, as well as any other changes that could impact the Trust's business system

j) Match the proposed business process flows and automation plan to the Trust's process automation plan.

k) Facilitate validation workshops, whereby the consultant will walk through the draft process maps with management team to ensure accuracy and completeness of processes and to validate assumptions or observations relating to potential risks and inefficiencies. The consultant will present maps to management, discuss suggested process improvements and validate any changes.

2.3. Deliverables

a) The consultant will prepare and submit a consultancy report to PASS Trust on completion of the assignment.

b) The report will cover the following deliverables:

1) As - is Study Report, including stakeholder analysis, identification of services and detailed process diagrams for the current business processes. The report shall also identify current threats to the organization, bottlenecks and possibilities for improvement.

2) To - be Study Report, including new business processes, organizational structure and roles and responsibilities of institutional structures and individual functions.

3) Comparative Report (Gap Analysis) of current and new business processes.

4) Business Process Design Report, including all areas outlined in the scope of work and as modified through discussions.

5) Terms of Reference (TOR) for Implementation of Business Processes automation. The TOR has to be precise and detailed regarding the scope of work, deliverables, timetable, and expected team qualifications.

2.4. Timetable

a) Consultants interested in provision of this service are invited to submit their proposal – technical and financial – by February 07, 2020 by 10:00 Hrs. The proposals can be sent via email: md@pass.or.tz or submit them at PASS HQ offices (Patel building, 3rd Floor, Kisutu Street, Dar Es Salaam, Tanzania)

b) The successful consultant is expected to start work by February 10th 2020.

c) Expected duration of the work is 60 days from the start date.

2.5. Specific Inputs to be Presented by the Client

a) PASS Trust will facilitate the consultant's access to requisite information and will provide the consultant with the necessary administrative, physical and logistical support for an efficient performance of the assignment.
b) One member of staff will work with the consultant to provide the benefits of cumulative knowledge and experience from within the Trust.

3.0. Payment

a) The successful consultant may request to be paid 50% of the contract sum at commencement of work.
b) The remaining 50% will be paid on completion of work and submission of report.

4.0. Selection Criteria

PASS Trust wishes to have the following profiles for the consultant:
a) A minimum of 5 years of relevant experience, preferably with banking financial institutions
b) Possessing experience and strong familiarity with operational practices in the financial sector and capacity to apply them in Process Mapping
c) Experience in Process Mapping (developing detailed process maps) and Business Process Reengineering
d) Relevant credentials with at least 3 similar projects as practitioner and/or as consultant (desirable)
e) High capacity to adapt and understand the local context to propose tailored-made and realistic solutions/recommendations, which will be aligned with the business strategy and expectations of the client

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