



## WORKERS' COMPENSATION FUND CONTROL BOARD

### **Request for Expression of Interest (EOI)** **EOI NO. WCFCB/CS/15380/2020**

#### **CONSULTANCY SERVICES FOR DETERMINATION OF SYSTEMS REQUIREMENTS AND DATA PREPARATION FOR THE DESIGN, DEVELOPMENT AND IMPLEMENTATION OF AN ENTERPRISE RESOURCE PLANNING (ERP) AND SELF SERVICE FACILITIES FOR WORKERS' COMPENSATION FUND CONTROL BOARD**

### **1.0 BACKGROUND**

The Workers' Compensation Fund Control Board (WCFCB) is a Social Security Institution headquartered in the city of Ndola, with operations throughout Zambia. WCFCB's mandate is to provide benefits to workers who get injured or contract diseases in the course of their employment. WCFCB collects revenue from employers by way of Assessments in order to meet its mandate as provided for in the Workers' Compensation Act No. 10 of 1999 of the Laws of Zambia.

WCFCB has funds for Consultancy Services for Determination of Systems Requirements and Data preparation for the Design, Development and Implementation of an Enterprise Resource Planning (ERP) and Self Service facilities for Workers' Compensation Fund Control Board.

### **2.0 OBJECTIVES**

The objectives of the Consultancy Services is to determine systems requirements, re-engineer business processes and identify ERP modules for adoption in the designing, development and implementation of the Enterprise Resource Planning. Develop specifications for all the ICT infrastructure components required for operationalization of the ERP and provide estimates and draft detailed requirements for post system implementation. The main anticipated activities are outlined in the assignment below but not limited to the following:

### **3.0 THE ASSIGNMENT**

#### **Activity A: As-Is Assessment**

The As-Is assessment phase will consist of the following key activities.

## **A.1 Assessment of Processes**

- I. Study organizational hierarchy, department, roles and responsibilities of personnel/officials within Workers Compensation Fund Control Board
- II. Study the existing capacities in terms of available manpower, skills and competencies in Workers Compensation Fund Control Board to identify and address the gaps keeping in view the future requirements.
- III. Study the existing procedures/processes within the organizational functions such as Compliance and Benefits, Legal Services, Human Resources, Finance, Investments, Audit, Procurement and Supply, ICT, Communications and Customer Services, Project Management and any other business processes.
- IV. Study the procedures in place to manage the available data of the above mentioned functions, whether manual-entry, automated, combination of manual and automated, involvement of outsourcing, whether in hard-copy/ soft-copy etc.
- V. Understand the challenges being faced currently in the various business functions listed above.
- VI. Study the key entities that play a role in the business processes of the above mentioned functions.
- VII. Undertake Data cleansing or data cleaning by identifying and removing (or correcting) inaccurate records from a data-set, table, or database. This refers to recognizing unfinished, unreliable, inaccurate or non-relevant parts of the data and then restoring, remodeling, or removing the dirty or crude data.

## **A.2 Assessment of existing IT infrastructure**

- I. Study the available IT infrastructure being used and to be created by Workers Compensation Fund Control Board along with their user departments and functionalities.
- II. Study the usage of various existing and to be used software applications and identify the challenges faced at various levels.
- III. Study various aspects of existing and to be used applications like licensing, possibility of integration, application maintenance procedures, operating system, databases, architecture, any enhancement plans that are being undertaken etc.
- IV. Study the functionalities/processes that are supported by the existing and to be used applications.
- V. Study the hardware available at HQ Data centre Kitwe Data centre and assess possibilities to leverage the existing capacities more effectively in future.

### A.3 Business Processes Reengineering

- I. **Identify and Analyse Improvement Opportunities.** Identify, analyse and validate opportunities to address the gaps and root causes identified during analysis of current processes and infrastructure. This step also includes identifying and validating improvement opportunities that are forward facing – often strategic transformational opportunities that are not tethered to current state process.
- II. **Design Future State Processes.** Select the improvement opportunities identified above that have the most impact on organizational effectiveness, operational efficiency, and that will achieve organizational strategic objectives. Make sure to select opportunities for which the organization has the budget, time, talent, etc. to implement in the project timeframe. Create a forward-facing future-state map that comprehends the selected opportunities.
- III. **Develop Future State Changes.** Operationalization of above identified opportunities before implementation. New workflows and procedures need to be designed and communicated, new/enhanced functionality is developed and tested, etc. Changes and opportunities cannot be implemented until they are operationalized.

#### 2.1.2 Activity B: To-Be Design

- I. Based on the detailed assessment conducted in the As-Is Assessment phase, the consultant should develop the IT proposed ERP functionality architecture based on the following objectives:
- II. Meeting Workers Compensation Fund Control Board's requirement for a state of the art Data Centre facility at the HQ.
- III. Re-engineer Workers Compensation Fund Control Board's business processes to meet current customer needs.
- IV. Meeting Workers Compensation Fund Control Board's requirement to establish a state of art processes as part of ERP.
- V. Meeting Workers Compensation Fund Control Board's generation-business specific requirements.
- VI. Implementing the technology design based on leading industry standards while addressing the need for scalability and flexibility without undermining the data integrity and transparency required for enabling the processes.
- VII. Leveraging various existing and planned components of IT solutions.
- VIII. Ensuring integration as necessary with various existing and planned IT solutions.

The following are the activities envisaged as part this phase.

### **B.1 Solution Design for ERP**

Based on the assessment of processes undertaken as part of the As-Is assessment phase, the consultant in discussion with Workers Compensation Fund Control Board shall identify and propose the ERP modules to be adopted based on consideration of various aspects such as- strategy for procurement of the modules, options for phased implementation, merits of each module etc.

- I. Consultant will take into consideration Workers Compensation Fund Control Board's need to manage and administer specific business requirements as part of the ERP solution.
- II. Consultant will take into consideration the legacy applications which are required to be continued as per Workers Compensation Fund Control Board's needs and design the solution keeping in mind the integration with the legacy applications.
- III. Consultant will discuss with Workers Compensation Fund Control Board to design and finalize the likely ERP modules to be adopted via Compliance and Benefits Management, Financial Management, HR Management, Investments and Property Management, Customer Relations Management, Procurement Management, Project Management, etc. Consultants have to ensure that there is no duplication of any work *vis-a-vis* Workers Compensation Fund Control Board with any other projects and initiatives undertaken by Workers Compensation Fund Control Board.
- IV. Consultant shall deploy suitable Business Intelligence (BI) tools in the ERP structure to ensure that both BI and ERP can be integrated for decision making.
- V. Consultant will discuss with Workers Compensation Fund Control Board on the other critical requirements of the ERP solution (ex. Training, Change Management), and formulate a strategy for addressing these requirements.
- VI. Consultant will develop the technical architecture and the solution architecture for implementing the ERP solution.
- VII. Consultant will develop the licensing requirements of the ERP solution based on usage requirements of Workers Compensation Fund Control Board.
- VIII. Consultant will discuss and finalize the scope of the implementation, and the approach for phased implementation.
- IX. Consultant shall draft the detailed Functional Requirement Specifications (FRS) for each module. This can be included as specifications in the Terms or Reference for the selection of the Implementation Agency.

- X. Consultant shall discuss the draft requirements with Workers Compensation Fund Control Board prior to finalizing the same.
- XI. Consultant shall also identify and incorporate the unique/custom requirements of the Process Owners of the concerned business functions of Workers Compensation Fund Control Board.
- XII. Consultant shall Conduct Presentations & Workshops for building common vision and understanding of BI and the ERP system and developing best business practices.
- XIII. Consultant shall prepare a Detailed Feasibility Report covering the scope of work, budgetary estimate, Information System architecture, documentation and work flow etc.
- XIV. Consultant shall assist in re-engineering and identifying organization obsolete functions in the organization - oriented management practices and to recommend for ERP based process or change / customize ERP and use BI for customization.

## **B.2 Designing IT Infrastructure**

- I. The existing IT infrastructure as well as the infrastructure planned under any other scheme for Workers Compensation Fund Control Board Headquarters as well as other offices shall be assessed before defining additional requirements of IT infrastructure.
- II. Consultant shall take into consideration the redundant telecommunication connectivity which is existing, and suggest the requirements for the proposed ERP system.
- III. Consultant shall estimate and develop the specifications for all the IT infrastructure components required for deploying the information systems across the headquarters and other offices of Workers Compensation Fund Control Board , including:
  - a) Servers
  - b) Storage Devices
  - c) Network Connectivity
  - d) Security Devices
  - e) Software
- IV. Consultant shall suggest ways and means to leverage the existing investments in IT before detailing out the additional capital (CAPEX) and operational (OPEX) expenditure based on the estimate developed.
- V. Consultant shall adopt latest technology standards and practices for developing the specifications for the required IT infrastructure.

- VI. Consultant shall draft detailed requirements that can be included as specifications in the Terms of Reference for the selection of the Implementation Agency.
- VII. Consultant shall draft detailed capacity building requirements based on as is evaluation to ensure sustainability of ERP implementation.
- VIII. Consultant shall draft detailed requirements for post system implementation which will include system handover and acceptance testing by the Board.

#### **4.0 REQUIREMENTS**

1. Experience in Requirements gathering and Data Preparation Services for deployment of Enterprise Resource Planning (ERP) for Large Organizations.
2. Experience in deployment of Backend Platforms; web logic and Implementation of Enterprise Resource Planning packages in complex environments
3. Proof of similar assignments undertaken in large organizations
4. Bidder must be a partner of the ERP development company such as Oracle or show proof ownership of the ERP
5. Bidder must have experience in Quality Assurance with Computer Systems; ERP quality assurance an added advantage.
6. The Bidder must have a team of experts with the following profiles and competencies:
  - Team Leader with a minimum of a relevant Bachelor's Degree minimum and 5 years of Practical Experience and above
  - A relevant educational background with a minimum of 3 years of practical work experience
  - Specific experience in the technical design, configuration and deployment of Enterprise Resource Planning
  - Experience in Systems analysis and Design

#### **5.0 INVITATION**

Workers' Compensation Fund Control Board now invites eligible suitably qualified Consultants to indicate their interests in providing the Consultancy Services for determination of Systems Requirements and Data preparation for

the Design, Development and Implementation of an Enterprise Resource Planning (ERP) and Self Service facilities.

This request is conducted under the National Open Selection method as provided under Section 28 of the Public Procurement Act No.12 Of 2008.

Interested eligible ICT Consultants/Firms must provide capability statements indicating that they are qualified to perform the services. More specifically, the capacity statements must demonstrate as a minimum the following qualifications, experience and compliance:

- (i) Proven experience in design, development and implementation of similar completed assignments in the last 5 years;
- (ii) Description of similar assignments;
- (iii) Appropriate skills for team members accompanied by detailed Curriculum Vita (CVs) and years of experience in similar field;
- (iv) Registration with ICT Association of Zambia
- (v) Registration with Workers' Compensation Fund Control Board with valid compliance certificate
- (vi) Registration with Zambia Revenue Authority with valid Tax compliance certificate
- (vii) Registration with National Pension Scheme Authority with valid compliance certificate

Interested Consultants must provide detailed information indicating that they are qualified to perform the services (brochures, description of similar assignments, availability of appropriate skills among staff, etc.)

Interested Consultants may obtain further information at the address indicated below during office hours from 08:00 to 13:00 hours and 14:00 to 17:00 hours, local time, week working days only before **23<sup>RD</sup> July 2020**.

**DETAILED TERMS OF REFERENCE SHALL ONLY BE AVAILABLE TO SHORTLISTED CONSULTANTS.**

All interests **MUST** be submitted in duplicate clearly marked as detailed below:

## **6.0 SUBMISSION**

The applications should be sent clearly marked:

**“EXPRESSION OF INTEREST FOR CONSULTANCY SERVICES FOR DETERMINATION OF SYSTEMS REQUIREMENTS AND DATA PREPARATION FOR THE DESIGN, DEVELOPMENT AND IMPLEMENTATION OF AN ENTERPRISE RESOURCE PLANNING (ERP) AND SELF SERVICE FACILITIES FOR WORKERS’ COMPENSATION FUND CONTROL BOARD”**

and addressed to Procurement and Supplies Manager, Workers' Compensation Fund Control Board, Compensation House, Corner Broadway/Moffat Roads, P. O Box 71534, Ndola, Zambia and must be sent not later than **31<sup>ST</sup> July, 2020** at

**10:30 hours local time** and deposited in the Tender Box at the Workers' Compensation Fund Control Board on the 4<sup>th</sup> floor, Compensation House, Corner Broadway/Moffat Roads, P. O Box 71534, Ndola, Zambia

The closing date for the receipt of Expressions of Interest is **31<sup>st</sup> July, 2020** at **10:30 hours local time** and any applications received after the time and date stipulated above shall not be accepted. The applications shall be opened soon after closing in the Procurement Unit Conference Room, 4<sup>th</sup> Floor, Compensation House, Corner Broadway/Moffat Roads, Ndola, Zambia, in the presence of applicants or representatives who choose to attend.

**Telefax and/or electronic Expression of interest will not be accepted.**

**Only short listed firms will be contacted.**

**THE BOARD RESERVES THE RIGHT TO REJECT OR ACCEPT ANY EXPRESSION(S) OF INTEREST WITHOUT ASSIGNING ANY REASON**

**For/WORKERS COMPENSATION FUND CONTROL BOARD**  
**PROCUREMENT AND SUPPLIES MANAGER**