Terms of Reference

Project Management Advisor for the Development of a Public Debt Management System (PDMS)

(A) Background

The Commonwealth is a voluntary association of 53 countries that support each other and work together towards shared goals in democracy and development. The Commonwealth Secretariat (www.thecommonwealth.org) is mandated by Commonwealth Heads of Government to provide technical assistance and policy advice to member countries.

The Commonwealth Secretariat’s debt management programme focuses on technical assistance needs of its member countries to build capacity in debt management. At the heart of the programme is assistance through its globally renowned system - Commonwealth Secretariat - Debt Recording and Management System (CS-DRMS), developed and maintained in-house at the Secretariat. The system is promoted as a global public good for the Commonwealth, and is widely regarded as a world leading system in the field.

First deployed in 1985, the software is provided free of charge to Commonwealth member states. The software is also made available to non-Commonwealth countries through a UK based distributor. As of now, the software has been made available to more than 60 countries around the world at over 100 sites.

The current generation of CS-DRMS running on the Windows platform came into being in 2001. Since then a number of major versions have been released in addition to regular service packs to ensure that the application remains relevant as an operational and debt management tool for debt managers.

With significant advancement in technology and new developments in debt management practices, the Secretariat has launched a project to design and develop a new public debt management system based on state-of-the-art Microsoft.Net technologies to replace the current CS-DRMS. The new system will also incorporate functionalities to address comprehensive requirements for public debt management.

The Secretariat has decided to outsource this development and in this context it has identified, through a tender process, an overseas software development firm for the design, development, testing and documentation of the new system. On the successful conclusion of the development activities, pilot implementation of the new software and warranty, the software will be brought in-house for maintenance and future enhancements. An information memorandum which was used during the earlier tender process for the selection of the software development firm is enclosed at annex I for information purposes. It gives a brief background of the project.

The software firm will work closely with the internal team at the Secretariat throughout the development process. The internal team will share necessary business knowledge for the development of the software while also playing a key role in the quality assurance of the various deliverables. This close working arrangements will also ensure knowledge transfer
for the Secretariat to build capacity to maintain the final product in-house once it is successfully delivered. The anticipated project development is estimated to be 36 months (inclusive of one year warranty).

The Secretariat is looking to enlist the services of a Project Management Advisor on a part time basis to play an active role in the oversight of the development and management process of the project with particular emphasis on project and quality assurance.

(B) Objectives

The objective of the assignment is therefore very much about assurance of a successful delivery of an outsourced software product through:

1. Review and advice on appropriate project governance structures at the Secretariat for managing and implementing the outsourced project;
2. Review and advice on appropriate project processes, roles and responsibilities;
3. Review and advice on project management and quality assurance frameworks;
4. Continuously identify, monitor, and advise on mitigation of project risks
5. Monitor all aspects of the project’s performance and products as part of project and quality assurance

(C) Role Summary

The Project Management Advisor will work closely with the project management team to ensure that the project is delivered on time and to the required quality standard in line with agreed specifications.

The Project Management Advisor will provide advisory services to the Secretariat Project team and the Project management committee(s), where required. The aim is to provide expertise and experience in key areas and provide a mentoring role to the Secretariat team. The role covers advice on project management and product delivery through quality control, timescale planning, process management and containing and managing risks. The Project Management Advisor role is key to the successful delivery and implementation of the PDMS product.

(D) Duties and Responsibilities

The responsibilities of the Project Advisor will include the following:

1. Provide advice on project management planning and processes, including governance structures;
2. Advise on communication management strategy including stakeholder analysis and procedures, means, frequency, format and records of communications with different stakeholders within and outside ComSec;
3. Advise on the quality management strategy including quality standards, quality management procedures, quality assurance controls and activities and responsibilities;
4. Advise on the configuration management strategy including management of version and change control of the various project deliverables;
5. Provide advice on managing scope issues, reviewing project related changes escalated to the Project Sponsor and providing assessment and analysis as required;
6. Advise on risk management strategy including risk identification, assessment, controls and mitigation.
7. Undertake risk identification/assessment and suggest risks mitigation options as required and escalate to the Secretariat Project Sponsor;
8. Undertake periodic monitoring and review of the project progress reports, scope and timing, identifying potential gaps and overruns and suggesting solutions;
9. Work with the Project Sponsor on problem escalation and resolution - reviewing unresolved problems escalated to the Project management committee and providing input/assessment and advice as required;
10. Monitor and alert the Project Sponsor on conflicts on the delivery of the project and provide advice on resolution of such issues;
11. Review project activities for compliance with procedures and standards;
12. Impart project management knowledge and skills to the Secretariat staff to better manage and implement projects;

Specifically the Project Management Advisor will be expected to:

1. Work with the Project Sponsor, the Project Manager and other members where required, recommending positive action to avoid risks and conflicts;
2. Participate and provide input to the Project management committee meetings, as requested;
3. Provide advice and support to the Secretariat Project Sponsor and Project Manager.

Overall the Project Management Advisor is expected to provide expert advice and general consultative support to all the key stakeholders and where required provide a mentoring role to members of the Secretariat team, especially the Project Manager.

(E) Key Deliverables

The key deliverables of this consultancy will include the following:

1. Report on review of the project governance structures and project management processes;
6. On-going advice with regard to relationship management, risk management, conflict resolution, project and quality assurance, project monitoring, change control and any other aspects to ensure successful delivery of the project;
7. Report to the Project Management Committee on a monthly basis, covering project progress, milestone achievement, key issues, risks identification/assessment and risk mitigation, change control, lessons, assessment of project performance indicators, plans for future stages.
The above reports 1 to 5 would be expected to be delivered early during the consultancy (first two months). The bidder should take this into account while devising the consultancy work plan.

(F) Location and Effort

The anticipated start date for this role is September/October 2015 with up to 120 person days (3 to 5 days spread over a month) throughout the project over a 2 year period till final acceptance of the software. Some flexibility on days and effort would be needed depending on the project process and also the stages of the project with the initial stages expected to require more effort for planning purposes.

The working base will be the Secretariat HQ in Pall Mall, London or the Project Advisor premises (as applicable). In case travel is required outside UK, the cost of economy airfare and subsistence allowance (in line with UN rates) will be met by the Secretariat.

Given that this role will require frequent travel to the Secretariat, invitation to submit proposals is restricted to local bidders (England) only.

(G) Reporting

The Project Management Advisor will report to the Secretariat Project Sponsor, who is the Head of the Debt Management Unit.

(H) Required Expertise

The Project Management Advisor should have:

- A university degree in project management, business administration, public administration, engineering or other related field
- At least 10 years senior software project management experience ideally with accreditation (e.g. Prince 2 Practitioner, PMI Certification, etc.)
- Experience of dealing with service management organisations;
- Proven experience in strategic planning;
- Demonstrable experience and good understanding of issues and industry best practices of outsourced software development projects;
- Good knowledge of system development lifecycles, its deliverables, scope and change management;
- Experience in dealing with conflicts and issues on outsourced projects
- Experience in project risk assessment and mitigation
- Demonstrable experience of advising on matters relating to complex product development and quality assurance
- Broad IT skills with experience working with project management software
- The ability to motivate and engage with project stakeholders and user contacts
- Effective written and verbal communication skills
- Proven time management skills with the ability to prioritise to ensure project goals are met
- Knowledge of financial systems would be desirable
(I) Remuneration
The Secretariat will provide remuneration on a time and material basis (i.e. for the number of person days actually used) on a quarterly basis. The advisor will be accordingly required to fill in and submit a timesheet reflecting effort spent (e.g. in terms of number of days/hours of effort). The Secretariat will also cover travel cost to the Secretariat’s premises and subsistence allowance according to UN rates (if applicable).

Bidders are invited to indicate their expected daily rate for the project management advisory services.

(J) Assessment Criteria
Bids will be assessed based on the following criteria:

- Understanding of the terms of reference
- Methodology and work plan for undertaking the assignment
- Experience of bidder
- Consultancy fee

Shortlisted candidates may be invited for an interview at the Secretariat’s premises in London as part of the assessment of the bids.

(K) Submission of Proposals
Proposals must include the following:

1. The profile of the bidder and details of similar projects undertaken;
2. A write up explaining:
   
   (i) the bidder’s understanding of the assignment;
   (ii) the methodology for undertaking the assignment and achieving the objectives;
   (iii) the adequacy of the bidder’s knowledge and experience with reference to the assignment covering the responsibilities and deliverables and the required expertise;
   (iv) Detailed CV of bidder showing skills and experience related to the assignment;

3. A work plan for the different activities and deliverables along with estimated effort for the various activities and deliverables

4. Daily consultancy rate