

# **TERMS OF REFERENCE (TOR) FOR THE PROVISION OF CONSULTANCY SERVICES FOR PROJECT MANAGEMENT, BUSINESS PROCESS RE- ENGINEERING, CHANGE MANAGEMENT AND STAKEHOLDER MANAGEMENT FOR KENYA REVENUE AUTHORITY**

## **Background**

Kenya Revenue Authority (KRA), is the agency of the Government of Kenya responsible for the assessment, collection and accounting for all revenues that are due to the Government, in accordance with the Laws of Kenya.

To effectively deliver on its mandate, KRA is developing a comprehensive technology platform aimed at improving operational efficiency, taxpayer engagement, and data- driven decision-making. This includes systems such as the Domestic Taxes Management System (DTMS), Taxpayer Portal, CRM-integrated Unified Service Portal, ERP, Case Management System, Document Management System and advanced analytics tools powered by AI and ML. Additionally, supporting infrastructure like private cloud, and secure network solutions based on a robust enterprise architecture will be implemented.

To ensure successful execution, the program will be guided by strong digital transformation, program management, business process re-engineering, change management and stakeholder engagement programs comprising of initiatives provided in LOT 1 and LOT 2.

<b>1. Objectives</b>	<p>The objective of this consultancy service is:</p> <p><b>I. General Objectives</b></p> <ol style="list-style-type: none"><li>1. Provide strategic and operational support to ensure successful execution of the digital transformation program.</li><li>2. Ensure effective program management, oversight and delivery aligned with organizational goals and timelines.</li><li>3. Support the review of existing processes and systems and re-engineer them to be more responsive to stakeholder needs.</li><li>4. Drive impactful change management and stakeholder engagement to support adoption and alignment.</li></ol> <p><b>II. Specific Objectives</b></p> <ol style="list-style-type: none"><li>1. Ensure all Digital Transformation initiatives are identified, analyzed, scoped and managed and that all key stakeholders to the</li></ol>
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	<p>program are engaged before, during and post transformation.</p> <ol style="list-style-type: none"> <li>2. To work with business process re-engineering units of Kenya Revenue Authority to develop comprehensive, simplified and standardized SOPs that are well aligned with industry best practices, regulatory requirements, organizational goals as well as technological advancements.</li> <li>3. Facilitate comprehensive technical training and capacity building to strengthen internal capabilities and ensure sustainability of the digital transformation program.</li> <li>4. Lead stakeholder management efforts by identifying, analyzing, and engaging all key stakeholders throughout the transformation process—before, during, and after implementation.</li> <li>5. Enable and empower KRA staff to adopt, utilize and operationalize the planned digital transformation solutions.</li> </ol>
<p><b>2. Scope of consultancy services</b></p>	<p>The consultancy will support the tax administration in planning, designing, implementing, and institutionalizing a comprehensive digital transformation program aimed at improving efficiency, compliance, service delivery, and data- driven decision-making. The scope shall include, but not be limited to, the following key areas:</p> <p><b>1. Program Oversight &amp; Delivery</b></p> <ul style="list-style-type: none"> <li>• Establish a governance framework for the digital transformation program, including key delivery and oversight roles.</li> <li>• Develop and maintain a comprehensive transformation roadmap with phased milestones aligned to the overall digital strategy.</li> <li>• Lead implementation support and provide delivery assurance across the program.</li> <li>• Coordinate, manage and/or supervise program activities across internal teams and external vendors to ensure timely delivery of all the deliverables in the Comprehensive Technology Platform program.</li> <li>• Maintain and track a detailed program plan covering timelines, milestones, deliverables, and resource utilization (budget, personnel, and technology).</li> <li>• Support building of internal capacity on the Digital Transformation Program Management including recommendations on relevant training, tools and structures.</li> <li>• Ensure adherence to approved project management methodologies (e.g. but not limited to, PMI, Agile, PRINCE2).</li> </ul> <p><b>2. Digital Transformation</b></p> <ul style="list-style-type: none"> <li>• Conduct a baseline assessment of the organization's digital readiness across systems, people, processes, data, and</li> </ul>

	<p>infrastructure.</p> <ul style="list-style-type: none"> <li>• Benchmark against international tax administration best practices.</li> <li>• Align digital transformation objectives with national tax policy, organizational strategy, and modernization goals.</li> <li>• Define the vision, strategic pillars, priority initiatives, and investment requirements.</li> <li>• Prepare a 3–5 year digital transformation roadmap with timelines, dependencies, and expected outcomes.</li> <li>• Establish governance structures to support effective program execution.</li> <li>• Provide technical guidance for the design, development, and rollout of priority digital tax systems and platforms.</li> <li>• Provide guidance on the design of an ideal enterprise architecture covering core revenue systems, taxpayer-facing services, data exchange and utilization of modern technologies.</li> <li>• Provide guidance on the optimizing of data governance, management and analytics capabilities with the use of modern technologies and approaches.</li> <li>• Develop KPIs, performance indicators, and monitoring tools to track digital transformation progress.</li> <li>• Provide sustainability models that institutionalize digital capabilities, governance, and continuous improvement.</li> <li>• Support transition planning and handover to internal teams for long-term ownership.</li> </ul> <p><b>3. Business Process Re-engineering (BPR)</b></p> <ul style="list-style-type: none"> <li>• Collaborate with KRA's business process re-engineering teams to analyse, review, and re-engineer SOPs during the initial phase of the digital transformation program.</li> <li>• Oversee business process re-engineering efforts to drive simplification, efficiency, and alignment with strategic goals.</li> <li>• Conduct process gap analysis to assess current workflows and identify priority SOPs for re-engineering and automation to enhance efficiency.</li> <li>• Develop clear, structured, and standardized “To-Be” SOPs with recommendations for prioritizing processes aligned to strategic goals and customer needs.</li> <li>• Research and benchmark global best practices to support SOP standardization and harmonization across diverse organizational units.</li> <li>• Build capacity within the re-engineering team in process</li> </ul>
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	<p>mapping and adoption of emerging technologies for workflow documentation and process improvement.</p> <ul style="list-style-type: none"> <li>• Prepare and present progress reports and outcomes to project sponsors and senior leadership on a monthly basis.</li> <li>• Provide guidance on integrating emerging technologies such as robotic process automation, AI and machine learning into business workflows and automation platforms.</li> <li>• Embed risk controls and mitigation mechanisms within redesigned workflows, aligned with organizational policies and control frameworks.</li> <li>• Establish a governance model for ongoing maintenance and updates of SOPs.</li> </ul> <p><b>4. Change Management &amp; Capacity Building</b></p> <ul style="list-style-type: none"> <li>• Conduct change readiness assessments and develop a comprehensive change management plan covering KRA Change Management team, KRA Leadership and Senior Management, Middle Management and Supervisors, KRA Staff across all operational areas that will be impacted by the digital transformation program</li> <li>• Support building of digital competencies for staff, including training, coaching, and user adoption support.</li> <li>• Support the implementation of the change management plan to help in accelerating adoption, utilization and operationalization of the digital transformation solutions into KRA processes and operations while minimizing the impact on day-to-day operations and managing resistance.</li> </ul> <p><b>5. Stakeholder Engagement &amp; Collaboration</b></p> <ul style="list-style-type: none"> <li>• Identification and analysis of all stakeholders impacted by KRA's digital transformation program.</li> <li>• Development of effective Stakeholder Communication and Engagement Strategies and Plans</li> <li>• Coordinate the implementation and monitoring of the Strategies</li> <li>• Facilitate structured engagement with internal and external stakeholders including taxpayers, MDAs, financial institutions, and private sector partners.</li> <li>• Support the creation of digital ecosystem partnerships to enhance data sharing and compliance.</li> </ul>
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<b>3. Time Frame</b>	The assignment is expected to be completed within a period of <b>Three(3) years</b> from the date of contract execution
<b>4. Methodology</b>	<p>The Consultant shall:</p> <ol style="list-style-type: none"> <li>1. Define the key phases of the assignment.</li> <li>2. Describe the content and duration of project activities.</li> <li>3. List the information collection tools necessary</li> <li>4. Specify the necessary engagements with KRA staff</li> <li>5. Specify the required level of stakeholder involvement.</li> <li>6. Specify the datasets, documents for review/information required.</li> </ol>
<b>5. Expected Deliverables</b>	<p>The Consultant(s/firm) is expected to provide the following deliverables:</p> <p><b>A. Inception report outlining the approach, methodology, timelines, and governance structures for the consultancy</b></p> <p><b>B. Digital Transformation</b></p> <ol style="list-style-type: none"> <li>1. Digital Maturity Assessment Report - A baseline diagnostic covering systems, infrastructure, skills, cybersecurity, and digital culture across HQ and all regional offices.</li> <li>2. Enterprise Digital Transformation Strategy &amp; Roadmap- A 3–5 year roadmap defining priority initiatives, technologies, timelines, investments, and success indicators.</li> <li>3. ICT Architecture &amp; Systems Integration Blueprint- Blueprint detailing system architecture, interoperability standards, APIs, data flows, and integration points with internal and external systems.</li> <li>4. Technology Assessment Report including RPA, AI/ML/automation use cases, integration and tools recommendations, architectural guidance</li> <li>5. Automation &amp; Workflow Optimization Plan-Identification and design of automated workflows (RPA, BPM tools, digital forms) to replace manual or paper-based processes.</li> <li>6. Digital Skills Development &amp; Capacity Building Program- Recommendations for Training and capacity-building for staff, including digital literacy, system usage, and data-driven decision-making.</li> <li>7. ICT Infrastructure Enhancement Plan - Recommendations of upgrades to networks, hardware, cloud migration, and resilience systems.</li> <li>8. Data Governance and Analytics Enhancement Plan</li> <li>9. Change Impact Assessment for Digital Adoption- Detailed analysis of how digital initiatives affect people, roles, processes, and culture, with mitigation measures.</li> <li>10. Enhanced User Experience (UX) &amp; Service Design Framework - Human- centered design guidelines for digital products, including customer journeys, UI/UX standards, and</li> </ol>

	<p>accessibility.</p> <p>11. Monitoring, Evaluation &amp; Sustainability Framework for Digital Systems - KPIs, monitoring tools, sustainability models, and continuous improvement mechanisms for all digital solutions implemented.</p> <p><b>C. Program Oversight &amp; Delivery</b></p> <p>12. Inception Report outlining the approach, methodology, timelines, governance structures and program/project management tools to be used for each project or work stream within the digital transformation (DT) program.</p> <p>13. Program Roadmap specifying clear milestones and performance indicators for each project or program</p> <p>14. Master schedule, implementation work plan, milestone tracker, integration plan for internal teams and vendors</p> <p>15. Coordination and liaison with system or solution implementers to ensure the development and delivery of both technical and non-technical documentation, and training materials.</p> <p>16. Coordination and liaison with project teams to ensure projects closure and the implementation of knowledge transfer programs including skills and capacity-building programs, and tracking of outcomes.</p> <p>17. Monthly/quarterly Program status reports, performance dashboards, KPI tracking, executive briefs for leadership</p> <p>18. Vendor engagement plans, coordination reports, activity tracker, and communication logs</p> <p>19. Risk management framework (Risk, Assumptions, Issues, Dependencies), mitigation plans and escalation logs</p> <p>20. Budget monitoring dashboards, cost-control strategy, expenditure vs milestone reports, financial risk assessments</p> <p>21. Final Program Report, Projects Closure Reports, lessons learned reports, sustainability plan, knowledge transfer reports, and handover documentation.</p> <p><b>D. Business Process Re-engineering</b></p> <p>22. Provide a detailed analysis report on existing workflows 'AS-IS' SOPs conducted with BPR teams, highlighting inefficiencies, gaps, bottlenecks, and SOPs requiring redesign.</p> <p>23. Fully redesigned, streamlined, and standardized 'TO-BE' SOPs, including process maps, workflow diagrams, and aligned recommendations for implementation.</p> <p>24. Training sessions, user guides, templates, and job aids to strengthen skills in process mapping, documentation, and use of emerging technologies for process improvement.</p> <p>25. Monthly and Quarterly reports and presentations summarizing progress, achievements, challenges, metrics, and next steps for senior leadership and project sponsors</p> <p>26. Written recommendations and integration guidelines on how to embed RPA, AI, and machine learning into redesigned workflows and automation platforms</p> <p>27. Updated SOPs and workflows incorporating internal controls,</p>
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	<p>risk mitigation mechanisms, and compliance requirements aligned with KRA policies</p> <p>28. A governance model outlining roles, responsibilities, version control procedures, update cycles, and quality assurance processes for ongoing SOP maintenance.</p> <p><b>D. Change Management</b></p> <p>29. Change Management Strategy &amp; Roadmap targeting different cadre of staff: Leadership and Senior Management, Middle Management and Supervisors, Technical Officers and other lower cadre staff. Detailed ADKAR-based plan, stakeholder mapping, impact assessments.</p> <p>30. Comprehensive change implementation toolkit including templates for communications, training plans, FAQs, resistance logs, risk registers, and feedback forms, etc.</p> <p>31. Change Impact Assessment Reports covering functional impacts, role changes, risk hotspots, required skills</p> <p>32. Training and Capacity Building Workshops including relevant certifications.</p> <p>33. Resistance Management Framework that includes identification, analysis, resistance prevention and mitigation strategies.</p> <p>34. On-the-Job Coaching and Support report</p> <p>35. Readiness Assessment Checklists to ensure teams are prepared for the change covering skills, equipment, SOPs, etc.</p> <p>36. Weekly/Monthly Progress Reports highlighting adoption progress, gaps, challenges, recommendations.</p> <p>37. Feedback and Support Mechanisms</p> <p>38. Change Management Monitoring &amp; Evaluation Framework</p> <p><b>E. Stakeholder Management</b></p> <p>39. Stakeholder Mapping &amp; Analysis Report covering all internal and external stakeholders, including influence, interest, expectations, and engagement priorities.</p> <p>40. Stakeholder Engagement Strategy &amp; Plan detailing engagement objectives, methods, messaging, timelines, responsibilities, and regional outreach activities.</p> <p>41. Stakeholder Communication Framework that will include key messages, communication channels, protocols, templates, and branding guidelines for consistent stakeholder communication.</p> <p>42. Stakeholder Engagement Calendar (Annual / Multi-year) with a detailed schedule of consultations, forums, workshops, meetings, and feedback sessions across headquarters and all regional offices.</p> <p>43. Engagement Materials &amp; Toolkits including presentation decks, briefing notes, communication packs, fact sheets, FAQs, and policy explainer documents for all engagements.</p> <p>44. Internal Stakeholder Alignment Report covering assessment of internal readiness, collaboration gaps, departmental roles, and alignment actions required for the transformation program.</p>
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	<p>45. External Stakeholder Consultation Workshops: Delivery of multi-sector stakeholder forums (e.g., private sector, MDAs, SMEs, civil society, professional bodies, banks, telcos, regional and international bodies ).</p> <p>46. Public Awareness &amp; Outreach Support Plan including activities and messages designed to maintain positive public perception and promote digital transformation initiatives.</p> <p>47. Feedback Collection &amp; Analysis Reports: Structured mechanisms (surveys, focus groups, digital feedback tools) and consolidated reports on stakeholder insights and concerns.</p> <p>48. Stakeholder Risk Assessment &amp; Mitigation Plan: Identification of potential resistance, risks, and conflict areas, with mitigation strategies and escalation protocols.</p> <p>49. Partnership Development Framework providing guidelines for collaborating with external partners including MDAs, development partners, industry associations, and service providers.</p> <p>50. Quarterly &amp; Annual Stakeholder Engagement Reports indicating a summary of engagement activities, participation metrics, key issues raised, resolutions, and recommendations to improve future engagements.</p>
<p><b>6. Expected Outcomes</b></p>	<p><b>The key outcomes expected from the Consultancy shall include:</b></p> <ol style="list-style-type: none"> <li>1. Robust Program and Project Governance and Delivery capability in the Authority</li> <li>2. Enhanced Digital Maturity and ICT Capability</li> <li>3. Modernized, integrated, reliable and user friendly tax administration systems</li> <li>4. Streamlined, optimized, standardized and digitized business processes.</li> <li>5. Improved Taxpayer experience and service delivery</li> <li>6. Organization-Wide Change Adoption and Capability Building</li> <li>7. Strengthened Stakeholder Engagement and Collaboration</li> <li>8. Enhanced Data Governance, Analytics, and insight generation for decision- making.</li> <li>9. Increased Operational Efficiency and Cost Savings</li> <li>10. Sustainable Digital Transformation Capability</li> </ol>
<p><b>7. Expertise</b></p>	<p>The lead Consultant should have:</p> <ul style="list-style-type: none"> <li>• A minimum of Master's degree in, Project Management, Business Information Technology, Human Resources or other related fields.</li> <li>• A valid/current membership with a relevant professional body or its equivalent and <b>demonstrable experience in Project Management, Digital Transformation, Business Process Reengineering, and Change &amp; Stakeholder</b></li> </ul>

	<p><b>Management and managing large teams with exposure in public sector.</b></p> <p>(Submit a detailed CV supported with certified copies of professional certificates and valid membership from the relevant professional bodies.)</p> <ul style="list-style-type: none"> <li>• Must have very strong knowledge of project management, process optimization, digital transformation initiatives, and change &amp; stakeholder management.</li> <li>• The consultant must demonstrate previous work experience in Project Management, Digital Transformation, Business Process Reengineering, Change and Stakeholder Management services with exposure in public and private sector.</li> <li>• The firm to provide a list of at least three (3) reputable corporate clients where you have conducted Project Management, Digital Transformation, Business Process Reengineering, Change and Stakeholder Management services within the last five years.</li> <li>• The consultant should have demonstrated ability to plan, coordinate, and execute complex projects on time and within budget using a structured project management methodology</li> <li>• The consultant must have ability to streamline operations, improve efficiency, and enhance customer experiences using digital tools.</li> <li>• The consultant should have experience in analyzing, redesigning, and optimizing business processes to improve efficiency and effectiveness.</li> <li>• The consultant should have ability to manage organizational change initiatives, ensuring smooth adoption and sustainability.</li> <li>• The consultant should demonstrate strong track record in developing stakeholder engagement strategies and managing multi-level communications.</li> <li>• Demonstrate teams with analytical skills that have collaborated to successfully deliver complex projects, particularly in digital transformation, process optimization, and organizational change initiatives.</li> </ul>
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- The consultant must provide a minimum of three (3) references of firms they have conducted Project Management, Digital Transformation, Business Process Reengineering, Change and Stakeholder Management services.
- Demonstrated ability to turn around the assignment and deliver a complete, quality result within the set deadline.
- Proven track record evidenced by recommendation letters in the area of Project Management, Digital Transformation, Business Process Reengineering, Change and Stakeholder Management, for comparable national or international organizations.

**Mandatory requirements:**

- Solid knowledge and experience in Project Management, Digital Transformation, Business Process Reengineering, and Change & Stakeholder Management initiatives with a good record of accomplishment on the same.
- The legal and professional status of the consultant in form of a professional certificate, certified copies of professional certificates and valid membership of relevant professionals and other testimonials for ease of reference.
- The experts should be Member of Project Management Institute (PMI) or any other recognized professional body. Attach certified copies of professional certificates and valid membership to the relevant professional bodies or its equivalent and at least five (5) years of relevant experience in the area of Project Management, Digital Transformation, Business Process Reengineering, Change and Stakeholder Management. Attach certified copies of professional certificates and valid membership to the relevant professional bodies.
- Detailed CVs of at least five (5) Technical staff who have a minimum Bachelor's degree in Project Management, Business Information Technology, Communication, Human Resources or other related fields. Attach certified copies of academic certificates for each expert.
- Proven record of achievements and significant expertise in

	<p>managing complex, multi-stakeholder projects, including the planning, design, implementation, and monitoring of organizational change initiatives, process optimization, and stakeholder engagement strategies (attach testimonials).</p> <ul style="list-style-type: none"> <li>• Demonstrate experience working with a minimum of three (3) large public organizations in Project Management, Digital Transformation, Business Process Reengineering, Change and Stakeholder Management.</li> <li>• Up to date tax compliance certificates for the firm and for the individual Directors and senior managers.</li> <li>• Specify the lead contact person(s) for the entire assignment.</li> <li>• Specify the contact person(s) who shall be in charge of the day-to-day execution of the assignment.</li> </ul>
<b>8. References</b>	<p>Provide a list of at least three (3) reputable corporate clients where you have conducted assignments of a similar nature. Attach documentary evidence i.e letters of award.</p> <p><b><i>Proof of satisfactory service from the clients listed above.</i></b>  Submit letters of reference/recommendation letters from the client (on clients' letterhead), which should include: summary of services rendered, value of contracts and contact person, address, email and telephone numbers.</p>
<b>9. Assessment Parameters/ Criteria</b>	<ul style="list-style-type: none"> <li>• Understanding of the TORs/assignment</li> <li>• Competencies in the area of Digital Transformation, Program and Project Management, Business Process Re-engineering, Change Management and Stakeholder Management.</li> <li>• Prior Experience in delivering a similar assignment</li> <li>• Experience of Lead Consultant in Digital Transformation Programs</li> <li>• References - Organizations where a similar assignment undertaken</li> <li>• Methodology</li> <li>• Key Subject Matter Experts</li> <li>• Cost</li> </ul>
<b>10. Terms of Payment</b>	<ul style="list-style-type: none"> <li>• Payment will be made based on satisfactory delivery and acceptance of specified deliverables to be organised into milestones in this assignment. The bidder should provide a costing schedule that breaks down all deliverables into proposed milestones.</li> <li>• The costing schedule should be submitted together with the Financial Proposal. The bidder should indicate the cost payable and the breakdown of how the amounts have been arrived at.</li> </ul>

<b>11. Workplan</b>	<ul style="list-style-type: none"> <li>Provide a summary of the assignment work plan</li> <li>Provide the activity schedule template</li> <li>Indicate the timelines for each of the key activities</li> <li>Indicate responsibilities, dependencies' for each of the key activities.</li> </ul>
<b>12. Cost</b>	<ul style="list-style-type: none"> <li>Submit a duly filled, signed and stamped Financial Proposal with Summary of Costs indicating the total cost in Kenya Shillings for carrying out the assignment.</li> </ul>

Technical and financial proposals will need to be submitted as separate documents. Financial proposals for non-qualifying technical proposals will not be opened.

### **Supervision**

The consultant will report to the Commissioner, Business Strategy and Technology Modernization (BTEM). The project team will constitute, members from respective Departments and Divisions within KRA.

**Disclaimer:** The material arising from the contract shall be the property of KRA and cannot be used without expressed written consent by the Authority.

### **TECHNICAL EVALUATION CRITERIA -**

***The bidder will be evaluated based on the following parameters:***

- Understanding of the TORs/assignment
- Competencies in the area of Digital Transformation, Program and Project Management, Business Process Re-engineering, Change Management and Stakeholder Management.
- Prior Experience in delivering a similar assignment
- Experience of Lead Consultant in managing Digital Transformation Programs
- References - Organizations where a similar assignment undertaken
- Methodology to be deployed
- Key Subject Matter Experts

**PART A: TECHNICAL EVALUATION**

Bidders **MUST** provide a clear commitment to meeting the requirements for all features irrespective of any attached technical documents in the table format below. **Use of Yes, No, tick, compliant etc. will be considered non-responsive.**

<b>S/No.</b>	<b>Description</b>	<b>Bidders Response</b>
	<b>Expected Deliverables: The consultant shall</b>	
1.	Provide an Inception report outlining the approach, methodology, timelines, and governance structures for the consultancy	
	<b>On Digital Transformation</b>	
2.	Conduct a Digital Maturity Assessment survey and provide a Digital Maturity Assessment Report - A baseline diagnostic covering systems, infrastructure, enterprise architecture, data governance, digital skills, cybersecurity, and digital culture across HQ and all regional offices.	
3.	Provide an Enterprise Digital Transformation Strategy & Roadmap- A 3–5 year roadmap defining priority initiatives, technologies, timelines, investments, and success indicators.	
4.	Provide an ICT Architecture & Systems Integration Blueprint- Blueprint detailing system architecture, interoperability standards, APIs, data flows, and integration points with internal and external systems.	
5.	Provide a Technology Assessment Report including RPA, AI/ML/automation use cases, integration and tools recommendations, architectural guidance	

6.	Provide an Automation & Workflow Optimization Plan-Identification and design of automated workflows (RPA, BPM tools, AI assisted processes, digital forms) to replace manual or paper-based processes.	
7.	Provide a digital skills development & capacity building program-Recommendations for Training and capacity-building for staff, including digital literacy, system usage, and data-driven decision-making.	
8.	Provide an ICT Infrastructure Enhancement Plan - Recommendations of upgrades to networks, hardware, cloud migration, and resilience systems.	
9.	Provide a Data Governance and Analytics Enhancement Plan	

10.	Provide a Change Impact Assessment for Digital Adoption report- Detailed analysis of how digital initiatives affect people, roles, processes, and culture within the organisation, with mitigation measures.	
11.	Conduct a review of the current User Experience (UX) & Service Design review and provide an enhanced User Experience (UX) & Service Design Framework - Human-centered design guidelines for digital products, including customer journeys, UI/UX standards, and accessibility.	
12.	Provide a Monitoring, Evaluation & Sustainability Framework for Digital Systems - KPIs, monitoring tools, sustainability models, and continuous improvement mechanisms for all digital solutions implemented.	
<b>On Program Oversight &amp; Delivery</b>		
13.	Provide an Inception Report outlining the approach, methodology, timelines, governance structures and program/project management tools to be used for each project or work stream in the DT Program.	
14.	Provide a Program Roadmap specifying clear milestones and performance indicators for each project or workstream	
15.	Provide a Master schedule, implementation work plan, milestone tracker, integration plan for internal teams and vendors	

16.	Coordinate and liaise with system or solution implementers to ensure the development and delivery of both technical and non-technical documentation, and training materials.	
17.	Coordinate and liaise with project teams to ensure projects closure and the implementation of knowledge transfer programs including skills and capacity-building programs, and tracking of outcomes.	
18.	Provide monthly/quarterly reports Program status reports, performance dashboards, KPI tracking, executive briefs for leadership	
19.	Provide vendors engagement plans, coordination reports, activity trackers, and communication logs	
20.	Provide risk management framework (Risk, Assumptions, Issues, Dependencies), mitigation plans and escalation logs	
21.	Provide budget monitoring dashboards, cost- control strategy, expenditure vs milestone reports, financial risk assessments	
22.	Provide final program report, projects closure reports, lessons learned reports, sustainability plan, knowledge transfer reports, and handover documentation	

<b>On Business Process Re-engineering</b>	
23.	Provide a detailed analysis report on existing workflows 'AS-IS' SOPs conducted with BPR teams, highlighting inefficiencies, gaps, bottlenecks, and SOPs requiring redesign.
24.	Provide fully redesigned, streamlined, and standardized 'TO-BE' SOPs, including process maps, workflow diagrams, and aligned recommendations for implementation.
25.	Conduct training sessions and provide user guides, templates, and job aids to strengthen skills in process mapping, documentation, and use of emerging technologies for process improvement.
26.	Provide monthly and quarterly reports and presentations summarizing progress, achievements, challenges, metrics, and next steps for senior leadership and project sponsors
27.	Provide written recommendations and integration guidelines on how to embed RPA, AI, and machine learning into redesigned workflows and automation platforms
28.	Provide updated SOPs and workflows incorporating internal controls, risk mitigation mechanisms, and compliance requirements aligned with KRA policies
29.	Provide a governance model outlining roles, responsibilities, version control procedures, update cycles, and quality assurance processes for ongoing SOP maintenance.

<b>On Change Management</b>	
30.	Provide Change Management Strategy & Roadmap targeting different cadre of staff: Leadership and Senior Management, Middle Management and Supervisors, Technical Officers and other lower cadre staff including a detailed ADKAR-based plan, stakeholder mapping, impact assessments.
31.	Provide comprehensive change implementation toolkit including templates for communications, training plans, FAQs, resistance logs, risk registers, and feedback forms, etc.
32.	Provide Change Impact Assessment Reports covering functional impacts, role changes, risk hotspots, required skills
33.	Implement Training and Capacity Building Workshops including relevant certifications.
34.	Provide a Resistance Management Framework that includes identification, analysis, and resistance prevention and mitigation strategies.
35.	Provide On-the-Job Coaching and Support report
36.	Provide Readiness Assessment Checklists to ensure teams are prepared for the change covering skills, equipment, SOPs, etc.
37.	Provide Weekly/Monthly Progress Reports highlighting adoption progress, gaps, challenges, and recommendations.
38.	Recommend Feedback and Support Mechanisms
39.	Provide a Change Management Monitoring & Evaluation Framework

<b>On Stakeholder Management</b>	
40.	Provide a Stakeholder Mapping & Analysis Report covering all internal and external stakeholders, including influence, interest, expectations, and engagement priorities.
41.	Provide a Stakeholder Engagement Strategy & Plan detailing engagement objectives, methods, messaging, timelines, responsibilities, and regional outreach activities.
42.	Provide a Stakeholder Communication Framework that will include key messages, communication channels, protocols, templates, and branding guidelines for consistent stakeholder communication.
43.	Provide Stakeholder Engagement Calendar (Annual / Multi-year) with a detailed schedule of consultations, forums, workshops, meetings, and feedback sessions across headquarters and all regional offices.
44.	Provide Engagement Materials & Toolkits including presentation decks, briefing notes, communication packs, fact sheets, FAQs, and policy explainer documents for all engagements done by the consultant.
45.	Provide Internal Stakeholder Alignment Report covering assessment of internal readiness, collaboration gaps, departmental roles, and alignment actions required for the transformation program.
46.	Conduct external Stakeholder Consultation Workshops: Delivery of multi-sector stakeholder forums (e.g., private sector, MDAs, SMEs, civil society, professional bodies, banks, telcos, regional and international bodies).

47.	Implement a Public Awareness & Outreach Support Plan including activities and messages designed to maintain positive public perception and promote digital transformation initiatives.	
48.	Provide Feedback Collection & Analysis Reports: Structured mechanisms (surveys, focus groups, digital feedback tools) and consolidated reports on stakeholder insights and concerns.	
49.	Implement a Stakeholder Risk Assessment & Mitigation Plan: Identification of potential resistance, risks, and conflict areas, with mitigation strategies and escalation protocols.	
50.	Provide and implement Partnership Development Framework providing guidelines for collaborating with external partners including MDAs, development partners, industry associations, and service providers.	
51.	Provide Quarterly & Annual Stakeholder Engagement Reports indicating a summary of engagement activities, participation metrics, key issues raised, resolutions, and recommendations to improve future engagements.	

**Remarks: Complied / Not Complied.**

Bidders who do not comply with any of the above requirements will NOT be considered for further evaluation

## **PART B: TECHNICAL EVALUATION**

The documents submitted will be evaluated for suitability and awarded marks, which will contribute to a maximum 80% of the total tender evaluation.

### **FIRM AND CONSULTANTS' REQUIREMENTS**

	<b>Description</b>	<b>Max Score</b>
1.	<b>Firm Experience/Reputation</b>	<b>22</b>
	<p><b>Company Profile</b></p> <p><b>The firm to provide a company profile which should clearly demonstrate the following:</b></p> <p>a. A well-established firm with a good record of accomplishment of Project Management, Digital Transformation, Business Process Reengineering, Change and Stakeholder Management services.</p> <p>b. Must demonstrate very strong knowledge of project management, process optimization, digital transformation initiatives, change and stakeholder management.</p> <p><b>Experience</b></p> <p>i) Above 10 years....5 marks ii) Between 8 years and 10 years .... 4 Marks iii) Below 8 years.....2 marks</p>	5
	<p>Must demonstrate very strong knowledge of national and international law /regulatory requirements, standards and practices relating to Customs and Domestic Taxes Administration. The Firm should demonstrate understanding of National, Regional and International tax laws and global best practices.</p> <p><b>Experience</b></p> <p>i) Above 10 years....5 marks ii) Between 10 years and 8 years .... 4 Marks iii) Below 8 years.....2 marks</p>	5



<p>Bidder to demonstrate record of achievements and significant expertise in managing complex, multi-stakeholder public projects, including the planning, design, implementation, and monitoring of organizational change, digital transformation, process optimization initiatives and change and stakeholder management strategies.</p> <p>The firm to provide a list of <b>three</b> (3) reputable corporate clients where you have conducted Project Management, Digital Transformation, Business Process Reengineering, Change and Stakeholder Management services.</p> <p><b><i>Bidder to provide Proof of satisfactory services from previous clients listed above:</i></b></p> <p class="list-item-l1">i) LPO/LSO or Executed Contract</p> <p class="list-item-l1">ii) The bidder to submit letters of reference/recommendation from the clients referenced in (i) above (on clients' letterhead) which should include: <b>summary of services rendered, value and contracts duration of the assignment carried out, contact person, address, email and telephone numbers.</b></p> <p>4 Marks for each client</p> <ul style="list-style-type: none"><li>• The information provided for the services carried out by the vendor shall be subjected to verification to confirm the successful implementation</li></ul> <p><b>The bidder should provide ALL the information indicated above in order to be awarded marks.</b></p>	<p>12</p>
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2.	<b>Lead Consultant and Key Personnel Competency Profiles</b> <b>Lead Consultant</b>	<b>32</b>
	<p><b>A) <u>Lead Staff/Consultant</u></b></p> <p>Should have a minimum of Master's degree in, Project Management, Business Information Technology, Human Resources or other related fields.</p> <p>A valid/current membership with a relevant professional body or its equivalent and <b>demonstrable experience in Project Management, Digital Transformation, Business Process Reengineering, and Change &amp; Stakeholder Management and managing large teams with exposure in public sector.</b></p> <p>Submit a detailed CV supported with certified copies of professional certificates and valid membership from the relevant professional bodies.</p> <ul style="list-style-type: none"> <li>• Masters .....<b>2 marks</b></li> <li>• Bachelors .....<b>1 marks</b></li> <li>• <i>Professional Qualification and Membership in Relevant body or its equivalent...</i> <b>1 marks</b></li> <li>• 10 years and above relevant experience.....<b>4 marks</b></li> </ul>	7
	<p><b>B) Key Personnel Competency</b> (5 Marks) for all requirements per proposed personnel below</p> <p><b>Required Key Experts:</b></p> <ol style="list-style-type: none"> <li>1. <b><i>Project Management Expert</i></b> <ol style="list-style-type: none"> <li>a. Minimum of a Bachelor's Degree in IT, Business related course, Project Management, or any other closely related field from a recognized institution.</li> <li>b. At least five (5) years of general experience in leading IT project management initiatives end-to- end.</li> <li>c. Professional certification in project management (e.g. PMP, PRINCE2)</li> </ol> </li> <li>2. <b><i>Digital Transformation Expert</i></b> <ol style="list-style-type: none"> <li>a. Minimum of a Bachelor's Degree in Information Technology, Computer Science, Software Engineering, or any other closely related field from a recognized institution.</li> <li>b. At least five (5) years of general experience in leading digital transformation initiatives end-to- end.</li> </ol> </li> </ol>	25

<p>c. Professional certificates to relevant professional bodies.</p>	<p><b>3. <i>Business Process Reengineering Expert</i></b></p> <p>a. Minimum of a Bachelor's Degree in Business Administration, Management Information Systems, or any other closely related field from a recognized institution.</p> <p>b. At least five (5) years of general experience in process improvement or BPR projects.</p> <p><b>4. <i>Change Management Expert</i></b></p> <p>a. Minimum of a Bachelor's Degree in Organizational Development, Human Resources, Business Administration or related field</p> <p>b. Professional certification in Change Management (e.g., CCMP, Prosci)</p> <p>c. At least five (5) years of general experience in organizational change initiatives, including strategy development, implementation, and adoption</p> <p><b>5. <i>Stakeholder Management Expert</i></b></p> <p>a. Minimum of a Bachelor's Degree in Communication, Public Relations or Business Administration from a recognized institution.</p> <p>b. At least five (5) years of experience in stakeholder engagement, communication, or public relations engagements.</p> <p>c. Professional certificates to relevant professional bodies</p> <p>For each expert:</p> <ol style="list-style-type: none"> <li>1. Attach detailed CV of the expert, minimum Bachelor's degree in business or Information Technology or relevant field.</li> <li>2. Attach certified copies of professional certificates and valid membership to the relevant professional bodies or its equivalent.</li> <li>3. Have at least Five (5) years of relevant experience in the area of Specialization.</li> </ol> <ul style="list-style-type: none"> <li>• Degree ..... 1 mark</li> <li>• <i>Professional Qualification and Membership in Relevant body or its equivalent...</i> 1 mark</li> <li>• <i>Relevant technical experience 5 years' and above</i> 3 marks</li> </ul> <p><b>Five (5) Marks for each resource with all requirements Max Score = 25 Marks</b></p>
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3.	<b>Demonstrate an understanding of the TOR/ Methodology</b>	<b>9</b>
	<p>The Consultant shall:</p> <ol style="list-style-type: none"> <li>1. Define the key phases and milestones for the assignment (2 Marks)</li> <li>2. Describe the content and duration of project activities. (2 Marks)</li> <li>3. Specify the engagements /interviews with KRA staff necessary (1 Marks)</li> <li>4. Specify the required stakeholders required to deliver the assignment (1Marks)</li> <li>5. Specify the approach to project management, digital transformation, business process reengineering, change and stakeholder management (3 Marks)</li> </ol>	9
	<b>Work Plan</b>	<b>7</b>
	<ul style="list-style-type: none"> <li>• Provide a summary of the assignment work plan to deliver and complete the assignment in three years</li> <li>• Provide the activity schedule template: Indicate the timelines for each of the key activities</li> </ul>	7
	<b>PITCH (ORAL PRESENTATION)</b>	<b>10</b>
	<p>Oral presentations shall entail: (Max- 10 marks)</p> <ol style="list-style-type: none"> <li>a) The firm's understanding of the assignment.</li> <li>b) The firm's intents to execute the assignment</li> <li>c) Team composition.</li> <li>d) Any other information that the interviewers' may require. (Information from the oral presentation will also be used as part of the technical evaluation process. The procuring entity reserves the right to incorporate elements from oral presentations in the final contract.)</li> </ol>	10
	<b>TOTAL SCORE</b>	<b>80</b>

***The cut-off scores for Technical evaluation is 60/80 marks which is equivalent to 75%***

## **FINANCIAL REQUIREMENT**

- N/B: Bidders to provide a detailed breakdown of how they have arrived at the total cost
- Grand Total Cost –To be carried Forward to the FORM FIN 2 Summary of Costs

## **OVERALL RFP TECHNICAL EVALUATION**

The bid evaluation will take into account technical factors in addition to cost factors. The weight for financial evaluation is 20% while the weight for technical evaluation is 80%. Bidders must conform to the specific Technical Requirements.

## **SUMMARY OF THE EVALUATION SCORES**

<b>Criteria</b>	<b>Maximum Score / Requirement</b>	<b>Cut-off Score</b>
Tender Responsiveness (Mandatory Requirements)	Mandatory	All
Part A: Technical Evaluation	Mandatory	Compliant
Part B: Technical Requirements Evaluation	<b>80</b>	<b>60</b>
Financial Proposal	<b>20</b>	<b>20</b>
<b>Total</b>	<b>100</b>	
Award	The award criteria shall be in line with Quality and Cost Based Selection(QCBS)	
Due diligence/Post Qualification	KRA may conduct due diligence to any or all the provided reference sites to ascertain past performance.	
Negotiation	The award shall be subject to Negotiation	