
Implementing Scrum/agile project management methodology and JIRA software in relation to the selected projects at GRS

1. Brief information on the project

Project: "Eastern Partnership Regional Fund for Public Administration Reform" Sub-project: "**Combating tax evasion through piloting the automatic exchange of information (AEOI) in Georgia**"

PN: 2015.2192.1-007

This sub-project, within the scope of German development cooperation, is implemented by GIZ "Eastern Partnership Regional Fund for Public Administration Reform" (<https://www.giz.de/en/worldwide/57219.html>). (thereafter referred as GIZ EaPRF sub-project)

About 2 years ago, Georgia launched so-called pilot project on Automatic Exchange of Information (AEOI) under the guidance of OECD global forum and Germany. The aim of the GIZ EaPRF sub-project is to assist all pilot project parties, especially GRS, in successful accomplishment of the pilot.

The main partner from Georgian side is Georgia Revenue Service (GRS). Other important stakeholders are OECD Global Forum, German Federal Ministry of Finance (BMF), German Federal Tax Office (BZSt), Ministry of Finance of Georgia and National Bank of Georgia.

2. Context

A new OECD Global Forum standard on Automatic Exchange of Information (AEOI or Common Reporting Standards - CRS) aimed at reducing the possibilities for tax evasions. It encompasses the process of exchanging financial data, for tax purposes, between the jurisdictions on systematic and uniform/standardised basis.

The AEOI pilot is a concept/method introduced by the OECD Global Forum for the countries, mostly developing, who are committed to implement the AEOI. Within the frame of the pilot project, more developed country, that already implemented the AEOI, guides the participant country through the process of implementation (in particular case Germany supports Georgia in AEOI/CRS implementation). Global Forum is also in the loop of the pilot and is ready for assistance, once it is needed. The participation of the countries in the pilot is voluntary.

Initial plan was to coincide the durations of the GIZ EaPRF sub-project with the AEOI pilot and to exchange the information until September 2020, however, according to the facts developed/occurred on later stages, the first information exchange (AEOI) will take place in September 2023. Therefore, for successful accomplishment of the pilot, it would be prudent to equip the key personnel with the contemporary project management skills and tools. This will increase the chances for sustainability after the sub-project finishes.

Nowadays most popular, suitable and available method of project management (especially IT associated projects) are Agile, Scrum, facilitated by the software tool - JIRA. Besides project management facilitation, JIRA is also used for the incident recording purposes and will be useful for further AEOI data security purposes.

It is also most likely that the GRS, as an organisation, will benefit from these internal project management tools, as GRS's wish to spread the method and the tools to other projects as well.

For better results, it is recommended to include more projects in the scope of work, especially the projects encompassing more established/recurring processes.

3. GIZ shall hire the contractor (consultant) from 10/08/2020 until 27/09/2020

4. The contractor (consultant) shall provide the following work/deliverables:

The overall objective of the assignment is the implementing of Agile/Scrum project management methodology and JIRA software in GRS.

At the beginning of the assignment, at least 3 projects (out of which 1 should be AEOI pilot) should be selected jointly by GRS and the contractor for the piloting.

Contractor shall provide the following deliverables:

- For selected 3 GRS's pilot projects: documented business process analysis and organizational system/structure analysis, with the aim of defining the architecture and implementation process for Jira software;
- In relation to selected projects, creation of 3 "Scrum teams" and implementing of scrum approaches (with an option, to implement "Kanban" framework for one team, if considered appropriate);
- Defining the scope for the Jira software, functionality requirements in relation to the pilot projects and the number of users;
- Configuring of Jira Software, its implementation and knowledge transfer;
- Assembling of Jira boards;
- In frames of assignment, facilitation and performing of at least 2 sprints with duration of 2 weeks for each team;
- Knowledge transfer - Identifying and training of internal coaches (Training of Trainers approach) on how to assemble Jira boards and know how transfer in application of Jira principles to other GRS projects (with the subsequent aim, that the internal coaches will later coach/guide other colleagues within the GRS, to adopt scrum/agile methodology in relation to the projects, they are responsible for);
- Training and coaching of potential users of Jira software, theoretical and practical (on-job training / learning by doing);

- Full two days remote training session in Scrum methodology, for each team and other selected GRS colleagues (up to 50 participants);
- Maintenance and support - after finishing field work and piloting, if required, contractor continues on demand free of charge support of Jira, Jira admin and Scrum/Kanban teams, for additional 2 months, to ensure sustainable results in scrum and Jira implementation.

5. Scope of the work

- Business process and organizational structure analysis of GRS
- Jira configuration
 - minimum for 100 users
 - minimum one Jira system administrator is trained
- Staff training
 - Up to 50 employees are trained in Scrum approaches
- Scrum pilot project implementation for ongoing projects
 - Minimum 3 pilot projects are selected
 - Minimum 3 scrum teams are identified
 - Selected pilot projects are implemented with expert's involvement (at least 2 assisted sprints per team with the duration of 2 weeks each, are conducted, including all-important ceremonies)
- Assembling of Jira boards and coaching in Jira for selected projects

6. Results

- Efficiency of Scrum project management approach in relation to the 3 pilot projects is assessed as positive by the participants of pilot projects;
- All pilot projects are carried out with scrum/agile best practices. Full process/cycle is documented and available for further review and use (e.g. grooming, planning, daily "scrum", sprint, sprint review and retrospective);
- Jira software is full-fledged and productively used by the personnel/users involved;
- Internal coaches are well prepared and are able to interpedently assemble Jira boards, and apply scrum/agile principles to other GRS projects;
- Detailed report (incl. recommendations) is available at the end of the assignment. Report shall contain the descriptions of the whole work process, review of outputs/outcomes and recommendations for sustainability of outcomes. It shall include roadmap, elaborating on outlook and recommendations for further dissemination of results and agile transformation of all GRS projects;
- At least 1 awareness raising session for the department heads at GRS is conducted.

7. Qualification of the tender participant and other requirements (incl. required documents):

- The tender participant shall have at least 3 years of experience in project management training delivery and at least 2 agile transformation projects in an organization conducted, employing at least 50 people (the list of projects must be uploaded together with the tender proposal);
- The tender participant shall have implemented at least 2 Jira software implementation projects, in an organization, employing at least 50 people (the list of projects must be uploaded together with the tender proposal);
- The coaches/trainers involved in the project shall have at least one of the certificates listed below:
 - Ø ICAgile Certified Professional - Agile Coaching (ICP-ACC)
 - Ø Kanban Management Professional (KMP);
 - Ø Professional Scrum Master (PSM I, PSM II);
 - Ø Professional Scrum Product Owner (PSPO I)

Corresponding certificates and CVs of the trainers, including references to the facilitated projects in the field of agile transformation and business process / organizational structure analysis, should be uploaded together with the tender proposal;

- Working language for trainings and coaching is Georgian. All required documentation shall be provided in Georgian language;
- Preference will be given to the tender participant which has implemented at least 1 agile transformation project in the public sector (the list of projects must be uploaded together with the tender proposal);

8. Specification of inputs

Description of Activity	Man - Hour
Business process and organizational structure analysis of GRS	up to 30
Summary report and roadmap for agile transformation rollout in GRS	up to 15
Training/coaching in Scrum methodology	up to 48
Jira configuration	up to 15
Training of Jira system administrator	up to 5
Coaching of Scrum teams and facilitation of sprints incl. all adhered ceremonies	up to 216
Total:	up to 329