REQUEST FOR PROPOSALS FOR IMPLEMENTATION AND MAINTENANCE OF AN ENTERPRISE CONTENT MANAGEMENT SYSTEM

MGL/ECM/2021

VENDOR'S NAME: ….………………………………………………………………………..

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1. CORPORATE OVERVIEW

Madison Group Limited (the company) is a financial services group offering Life Assurance, General Insurance and Investments Management Services under its three main subsidiaries - Madison Life Assurance Kenya Limited, Madison General Insurance Kenya Limited and Madison Investment Managers Limited. The company has its Head Office at Madison House, Upper Hill Close, Nairobi with 23 branches across the country.

2. INVITATION TO TENDER

Madison Group Ltd is looking to implement a scalable Enterprise Content Management System as the first digital process automation.

3. TENDERING INSTRUCTIONS

3.1. Eligibility

The tender is open to local companies duly registered under the Kenyan Companies Act and duly licensed. The bidders must provide relevant business licences and evidence of KRA tax compliance.

3.2. Submission of Tender Documents

Completed tender documents should be enclosed in plain sealed envelopes indicating the name of the tender and the tender reference number without identifying the bidder's name and be deposited in the Tender Box on Ground Floor, Madison House, Head Office, Upper Hill, Nairobi not later than **11.00am, Friday 05th February 2021**.

Submission of bids shall be in two sealed envelopes clearly marked:
MGL/ECM/2021 –Technical Original
MGL/ECM/2021 – Financial Original

The bids should be addressed to:
The Group Financial Controller
Madison Group Limited,
Madison House, Upper Hill Close
P.O Box 41163-00100,
NAIROBI, KENYA.

Tel No: +254 20 2864000, +254 70 9922000

A pre-bid briefing will be held on **Friday 29th January 2021 at 11:00am** at the Mara Boardroom on Ground Floor, Madison House. You are encouraged to attend the briefing.

3.3. Clarifications

Prospective bidders can request for clarifications by sending an email to the Procurement Office, ecm@madison.co.ke. The Procurement office will respond in writing to requests for clarification received not later than five (5) days prior to the deadline for the submission of tenders.

3.4. Additional Information

The Company reserves the right to request submission of additional information from prospective bidders.

3.5. Withdrawal of Tender

The Company may at any time terminate this procurement process before the award of contract and shall not be liable to any person for the termination.

3.6. Tender Currencies

Prices shall be quoted in Kenya Shillings or US Dollars.

4. TECHINICAL PROPOSAL

Refer to the Technical Requirements (Appendix 1).

5. PRE-QUALIFICATION INFORMATION

Attached to this document is a questionnaire (No. 7) to be completed by prospective bidders. The bidders must ensure that they provide documentation to support the information provided in the questionnaire. In addition to the questionnaire bidders will be required to provide information to satisfy the requirements set out from 5.1, 5.2, 5.3 and 5.4 below. Please note that incomplete tender documents will not be considered. All the documents that form part of the proposal must be completed in English.

It is understood and agreed that the tender documents for prospective bidders are to be used by the Company in determining, according to its sole judgment and discretion, the qualifications of prospective bidders to implement and maintain an Enterprise Content Management system.

Bidders will not be considered qualified unless in the judgment of the Company they are authorized, have the capability, experience, qualified personnel and working capital sufficient to satisfactorily execute the project.

5.1. Experience

Bidders must have at least five (5) years' experience in the implementation of similar projects. They must demonstrate competence, willingness and capacity to provide the services within reasonable timelines.

Past performance will be given due consideration in the evaluation. Bidders must provide proof of having **successfully completed** projects of similar or larger scale and size over the last two (2) years, preferably in the insurance sector. The proof should be in the form of documented and verifiable references, extract of contracts and purchase orders/service orders.

The company may require bidders to organise site visits where they have successfully implemented similar solutions.

5.2. Personnel

The bidders must provide the names, qualifications and experience and detailed CVs of the key personnel to execute the actual implementation. Bidders must provide a written undertaking that staff proposed for the work will be present for the whole duration of the project implementation.

5.3. Joint Ventures

Where the bidders propose to undertake the project jointly with other parties, they must provide evidence of successfully implemented projects whether jointly or individually.
The roles of the various parties during and after implementation must be clearly stipulated.

All parties must complete the Business Questionnaire and attach the required documentation as per the questionnaire.

5.4. Authorisations

Where bidders are proposing a third party solution, they must provide evidence of authorisation, certifications and partnership arrangements from the software developer.

5.5. Project Plan

Bidders must provide a detailed project plan for the entire project indicating key personnel for each implementation and details of delivery, installation and completion period.

5.6. Financial Condition

Bidders must provide evidence of financial ability to execute the project. The vendor's financial condition will be evaluated using the audited financial statements for the last two years.

6. FINANCIAL PROPOSAL

Bidders must provide a financial proposal separate from the technical proposal. The proposal should clearly indicate the detailed costings of the individual components tendered and a summary of all components clearly indicating the tax components of the cost. The bidders should also propose terms of payment. In particular, the proposal should clearly show:

i) Initial licence costs
ii) Implementation costs
iii) Annual licence costs
iv) Annual SLA costs

Bidders **may** separately guide on other cost associated with project. These costs will just be for information and will not be evaluated.

7. BUSINESS QUESTIONAIRE

A. COMPANY INFORMATION

Company Name: ____

As per certificate of incorporation

Trading Name: ____

If different from company name

Date of incorporation: ____

Nature of Business: ____

Physical Location: ____

House: ______________________________ Street/Road: ____________

Postal Address: ___________________________ Post Code: ____________

City/Town: ____

KRA PIN: ___________________________ Tax Compliance Status: ____________

No. of Staff: __________ Permanent: __________ Casual/Temporary: __________

Key Partnerships/Certifications

(i)__________________________ (iv)__________________________

(ii)__________________________ (v)__________________________

(iii)__________________________ (iv)__________________________

(Attach all relevant business licences, certifications and compliance documentation)

B. DIRECTORS AND SHAREHOLDING

Attach current CR12 (Not older than 6 months)

C. KEY PERSONELL

1. Name: ____
   Academic Qualifications:____________________________________
   Professional Qualifications: ________________________________
   Role in the Company____
   No. of years of experience:
   ____
   No. of years with company: _________________________________
   (Attach current CV and copies of Certifications)

2. Name: ____
   Academic Qualifications:____________________________________
   Professional Qualifications: ________________________________
   Role in the Company____
   No. of years of experience:
   ____
   No. of years with company: _________________________________
   (Attach current CV and copies of Certifications)

3. Name: ____
   Academic Qualifications:____________________________________
   Professional Qualifications: ________________________________
   Role in the Company____
   No. of years of experience:
   ____
   No. of years with company: _________________________________
   (Attach current CV and copies of Certifications)

4. Name: ____
   Academic Qualifications:____________________________________
   Professional Qualifications: ________________________________
   Role in the Company____
   No. of years of experience:
   ____
   No. of years with company: _________________________________
   (Attach current CV and copies of Certifications)

D. PAST/PRESENT CLIENTS

1. Name of Client:____

Sector: ____

Address: _________________________________Telephone: _________________

Name of Contact: _________________________ Position: ___________________

Email address of contact: ____________________Value of Contract____________

Completed/Ongoing? ______________ Duration of engagement _______________

Key Successes:

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(Attach proof of engagement with client, testimonials/references)

2. Name of Client:____

Sector: ____

Address: _________________________________Telephone: _________________

Name of Contact: _________________________ Position: ___________________

Email address of contact: ____________________Value of Contract____________

Completed/Ongoing? ______________ Duration of engagement _______________

Key Successes:

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(Attach proof of engagement with client, testimonials/references)

3. Name of Client:____

Sector: ____

Address: ______________________________Telephone: ________________

Name of Contact: _______________________ Position: __________________

Email address of contact: ___________________Value of Contract___________

Completed/Ongoing? _____________ Duration of engagement ______________

Key Successes:

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(Attach proof of engagement with client, testimonials/references)

4. Name of Client:____

Sector: ____

Address: ______________________________Telephone: ________________

Name of Contact: _______________________ Position: __________________

Email address of contact: ___________________Value of Contract___________

Completed/Ongoing? _____________ Duration of engagement ______________

Key Successes:

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(Attach proof of engagement with client, testimonials/references)

8. SWORN STATEMENT (MANDATORY)

Having studied the information in the document for the above project we/I hereby state:

a. The information furnished in our application is accurate to the best of our knowledge.

b. That I/We understand that I/We shall be disqualified should the information submitted here for purpose of seeking qualification be materially inaccurate or materially incomplete.

c. We enclose all the required documents and information required for the RFP evaluations.

Company Name ....

Represented by ....

Date ....

Signature ....

(Full name and designation of the person signing and stamp or seal)

9. APPENDIX 1: TECHNICAL SPECIFICATIONS:

Summary:

Madison Group intends to implement and maintain a digital process automation (DPA) system- a method of automation that uses software to perform processes and automate tasks with the goal of completing and optimizing a workflow. DPA focuses on automating, or partially automating, tasks involved in a variety of business practices that typically need some form of human interaction. More specifically to our business, DPA can be used in business workflows such as customer on-boarding, underwriting, claims, policy administration, pensions, investments, sales, customer service, marketing, management and IT.

The first step to achieving DPA will be the digitization of our documents hence the need to implement an Enterprise Content Management (ECM) System that is scalable to support Business Process Management and eventually full Digital Process Automation. Below are the requirements for an ECM system that includes scanning and indexing of documents:

A. REQUIREMENTS FOR AN ENTERPRISE CONTENT MANAGEMENT SYSTEM

No.	**MINIMUM FUNCTIONAL REQUIREMENTS**	**INDICATE (i) Standard Feature (ii) Requires Customization (iii) Not Available**	**PROVIDE DETAILED EXPLANATION**
1.	Ability to upload, index, view, share, store and retrieve documents • Integration with DMVIC (Digital Motor Vehicle Insurance Certificate) to allow upload of copies of motor certificates issued • Documents such as proposal forms, risk notes, KYC documents, quotations, email communication, tender award letters, Beneficiary Nomination forms, Claim forms, debit notes, schedules, policy clauses & premium workings		
2.	The application shall maintain a consistent folder and naming structure for retaining documents ensuring consistency.		
3.	The Application shall attach data elements (indexes and/or OCR text) to documents to allow for intelligent searching/retrieve.		
4.	The system must be user-friendly, intuitive and scalable.		
5.	All approval processes within any of the functions/ modules and integrated to the relevant module and all documents used		

	within any stage or module of the System must be stored in the document management system.		
6.	The Application shall support for viewing Documents in native application, Check-in check-out to be performed for editing and version controlling of documents and ability to generate multiple versions of the same document.		
7.	The application should support download and export to only designated role and export the document.		
8.	Must have a mechanism to add documents to the system		
9.	Should store documents in their original format		
10.	Should provide compression facilities to archive large documents		
11.	Should provide security for document check-in and check-out		
12.	Populate document metadata fields based on a prior set of selected fields		
13.	Users to select document categories and types from a drop down menu when adding a document to the system		
14.	Provide functionality to cross-reference related documents, i.e., access all documents that may be related to a specific customer or employee		
15.	Audit trail and document versioning throughout the life of the document including Creation, updation, modification and re-indexing along with check-in and checkout is tracked.		
16.	E-mail integration with case manager via correspondence module		
17.	Email messages (including threads and attachments) be captured and retained		

18.	Authorizations and Security		
19.	Integration with Scanning Solution so that the documents can be released into the document management system without any need for integration		
20.	Enable remote working/ working from home		
21.	Allow appending of digital signatures with time stamps by all users		
22.	Allow digital signing, franking and dispatch documents to clients		
23.	Ability to do Single & batch scanning		
24.	Filter and search functionalities		
25.	Mobile app feature or integration to enable capture of documents using phone camera		
26.	Allow integrations to the following Madison Group's core systems. - General Insurance - Life insurance - SAP - Healthcare - HRMS		

B. REQUIREMENTS FOR SCANNING AND INDEXING OF DOCUMENTS

No.	MINIMUM FUNCTIONAL REQUIREMENTS	INDICATE (i) Standard Feature (ii) Requires Customization (iii) Not Available	PROVIDE DETAILED EXPLANATION
1.	Should have a scanning log		
2.	Authorizations and Security		
3.	Scanners have capability to scan to ECM		
4.	Bulk scanning. Approximately 10 million pages • Survey of documents to understand page sizes and conditions of files. • Preparation of documents for scanning • File reconstruction – restoring the file to its original state after scanning		
5.	Assessment of scanning capacity and needs for ongoing business		
6.	Training of users		

Continuous Business Tasks/ Advice;

- Going forward implement e-documents
- Can be decentralized (scanning by people who open files or receive mail that should go to specific files) or centralized (a central scanning location)
- Assessment of scanning capacity and needs for ongoing business
- Training of users
- Any other relevant information or advice.