



REQUEST FOR INFORMATION

MOTOR VEHICLE INSURANCE CERTIFICATES MANAGEMENT SYSTEM

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1 INTRODUCTION

1.1 Background

Britam is a leading diversified financial services group, listed on the Nairobi Securities Exchange. The group has interests across the Eastern and Southern Africa region, with operations in Kenya, Uganda, Tanzania, Rwanda, South Sudan, Mozambique and Malawi. The group offers a wide range of financial products and services in Insurance, Asset management, Banking and Property.

The Group offers products and services to individuals, small businesses, corporations and government entities. The range of products includes life insurance, pensions, health insurance, and general insurance through its insurance businesses in the region. The financial solutions which include, unit trusts, investment planning, wealth management, off-shore investments, retirement planning and discretionary portfolio management which are offered through its asset management business. In addition, the company carries out property development, and also has substantial investments in the banking sector. For More information please visit <http://www.britam.com>

1.2 Purpose

The purpose of this document is to issue a formal Request for Information (RFI) for a Motor Vehicle Insurance Certificates Management System to be used across the entire Britam group.

1.3 Disclaimer

This document is a Request for Information and not a tender or Request for Proposal. Britam reserves the right not to issue a Request for Proposal (RFP) following this RFI.

2 RFI OVERVIEW

2.1 Objectives of the RFI

As part of its business transformation programme, Britam is looking to digitize and automate all its business processes both at the front and back office. One of the areas requiring such automation is the motor vehicles insurance certificates management and printing process that is today managed manually and following different operational procedures/processes depending on the Britam entity in question. To this end, Britam is seeking to obtain information on capabilities of various systems (standalone basis or part of a suite) with a view to evaluating the 'fit' of these solutions within the operations of Britam's motor insurance business as well as evaluating capabilities of potential partners within the IT space. For avoidance of doubt, Britam already has a robust motor policy administration system and is thus looking for a complimenting solution that only manages the motor insurance sticker/certificates acquisition, inventory management, printing and reconciliation processes.

2.2 Solution Scope

Britam is looking for a solution that is able to manage the following processes within the motor vehicle insurance certificate lifecycle;

- a) User Administration
- b) Certificate Requisition & Registration: process of requisitioning, receiving and registering certificates.
- c) Certificate Request & Issuing: processes of assign certificates to the branches and intermediaries.
- d) Certificate Printing: utilization of the certificates.
- e) Reporting: The following reports will be necessary at both branch level, intermediary and at head office level. The report specification details will be provided separately
 - o Utilization reports: showing the usage of the certificates for a select period
 - o Certificate inventory reports.
 - o Compliance report: showing certificate usage that does not comply with the defined rules

More detailed requirements of the envisaged solution are contained in the business requirements document accompanying this RFI (*Pure Motor Certificates Management BRD v2*).

3 HOW TO RESPOND TO THE RFI

3.1 Eligibility

This RFI is open to system integrators, value-added-resellers, system vendors or software development companies. As part of their response, interested respondents should provide the following company information, accompanied by the necessary supporting documentation.

- a) Company profile and registration status;
- b) Accreditation status with solution developer;
- c) Capacity to deploy and provide on-going support
- d) Proof of financial ability (audited financial reports for the last three years. Annual turn-over should not be less than Kenya Shillings 15 million)

3.2 Required Information

- a) Product bio (name, date of first release, warranty period, expected upgrades and maintenance terms).
- b) Detailed system functionality and features to meet the areas of operation outlined above. In addition, specify any potential for value added services in the solution.

- c) System architecture including database, web server, application server, fat/thin client as well as Operating System compatibility. In addition, outline the system's integration capabilities e.g. support for Service Oriented Architecture (SOA), out-of-the box integration adapters etc.
- d) Number of live deployments of the specific solution within Africa.
- e) Reference sites for successful implementations (including high level information on modules implemented, number of users, high-level license and implementation costs, implementation timeline, timeline for post-implementation support).
- f) Size and experience of the implementation team.
- g) Capacity to offer support and maintenance in Africa.
- h) List price of the proposed solution covering our outlined scope areas. Britam is open to either outright purchase or annual leasing of the solution.

3.3 Response Format

Responses to this RFI should be by email. All responses or clarifications should be sent to procurement@britam.com with the subject of the email being: **Request For Information – Motor Vehicle Certificates Management System**.

3.4 Costs for responding

This document shall not be construed as a request or authorization to perform work at Britam's expense. Any work performed by a respondent will be at the respondent's own discretion and expense. This RFI does not represent a commitment to purchase or lease. Submission of a response constitutes acknowledgement that the respondent has read and agrees to be bound by such terms.

3.5 Demos and Presentations

It is expected that information provided in writing by the respondents will suffice for this RFI response; However, Britam may directly contact a respondent to seek further information/clarification regarding the response provided. Respondents should not solicit for presentation or demo sessions as they are not envisaged as part of this RFI response.

3.6 Confidential information

Any information of a confidential nature contained in a response should be clearly marked 'CONFIDENTIAL' by item or at the top of each page. Reasonable precautions will be taken to safeguard any part of the response identified by a vendor as being confidential.

3.7 Response Material Ownership

The material submitted in response to the RFI becomes the property of Britam and will not be returned to the respondent. Britam has the right to use any or all ideas presented in reply to this request.