



REQUEST FOR PROPOSAL

DEVELOPMENT OF BRITAM FOUNDATION WEBSITE

RFI-2024-005/0003

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EXPRESSION OF INTENT TO PARTICIPATE IN TENDER

This form is to be completed on receipt of the tender document from Britam Holding Company (Kenya) Limited.

This page is to be completed immediately and scan copy in PDF format e-mailed to Procurement tenders@britam.com. The data contained in this form will be used to send out any addenda that may arise. Firms that do not register their interest by completing this form may not be sent addenda that may arise.

Name of the firm’s representative completing this form:

Firm’s Name:

Address:

Tel No:

Email Address:

Signature: _____ Date:

Signed by (Name):

Commercial-In-Confidence

Position in Firm:

1 INTRODUCTION

1.0 Purpose of the Tender

The Britam Holding Company Limited ("Britam") invites qualified firms to submit their proposals for development of Britam foundation website.

This Request for Proposal (RFP) is being made available to interested service providers on a restricted tender basis. This document is intended to provide vendors with sufficient understanding of the Britam's requirements to enable them to respond.

For the purposes of the RFP, it is necessary to disclose information in this document, and its schedules, which is considered confidential and should therefore not be used (otherwise other than in furtherance of this tender) or disclosed to any third party without explicit prior written consent of Britam.

Britam on its part also acknowledges that it is requesting through this RFI for information that is confidential and therefore commits in equal terms to reciprocal confidentiality.

1.1 Acknowledgement of Bidding Documents

Britam invites proposals for **Development of Britam Foundation Website** in accordance with the requirements set out in this document. Within **three (3) working days** of receipt of the RFP, the Bidder is required to acknowledge receipt of the RFP and notify his intention to submit a bid by email to Britam at tenders@britam.com. The mail will include the signed registration template on Page 4 of this document.

Working days are defined as being any day of the week between Monday and Friday (0800 – 1700 Hrs) excluding weekends and gazetted public holidays in the Republic of Kenya).

Failure to do so shall be perceived as an intention not to submit a bid and the Bidder will be eliminated from the bid process and required to destroy the RFI document in keeping with confidentiality requirements.

1.2 Point of Contact

All enquiries or correspondence concerning the details of this tender should be addressed, in the first instance by e-mail to: procurement@britam.com . The subject on the email should be **"CLARIFICATION ON THE RFP FOR DEVELOPMENT OF BRITAM FOUNDATION WEBSITE"**

- All responses from Britam to the Bidder shall be channelled through the Procurement Officer.
- It is the responsibility of the Bidder to obtain any further information required to complete this RFP.
- Any clarification request and their associated response will be circulated to all Bidders.
- All clarifications must be sought at the latest 5 days prior to the close of the RFP.

2 ABOUT BRITAM HOLDINGS PLC

2.0 Organization Profile

Britam Holdings PLC ("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. For more information, please visit <http://www.britam.com>.

The Group offers a wide range of 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, offshore 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>

2.1 Britam Vision

To be LEADING diversified financial services company in our chosen markets across Africa.

2.2 Britam Mission

Providing you with financial security EVERY STEP OF THE WAY.

3 OVERVIEW OF THE PROPOSAL

3.0 Overview

Britam is looking for a company to build a dedicated website for the Britam Foundation and ensure that the website aligns with the foundation's objectives, meets stakeholder needs, and delivers the desired functionalities.

3.1 Objective of the RFP

Britam seeks to contract a company to develop a dedicated Britam Foundation Website.

3.2 Scope of Work

The Britam Foundation website will encompass the following key functionalities:

1. **About Us:** Provide detailed information about the foundation's mission, vision, values, and history, allowing visitors to understand the organization's purpose and goals.
2. **Initiatives:** Showcase the various initiatives and projects undertaken by the foundation, highlighting their objectives, beneficiaries, and impact.
3. **Donation Portal:** Enable secure online donations through an integrated payment gateway, allowing individuals and organizations to contribute to the foundation's causes.
4. **Volunteer Management:** Facilitate volunteer registration and management, including the creation of volunteer profiles, tracking of volunteer hours, and assignment of tasks.
5. **Submit grant proposals:** A portal for partnership proposals to be submitted for evaluation.
6. **News and Events:** Keep stakeholders informed about the foundation's latest news, updates, and upcoming events through a dedicated section or blog.
7. **Multimedia Gallery:** Display a collection of photos, videos, and other multimedia content showcasing the foundation's activities and the impact of its initiatives.
8. **Resource Library:** Provide access to downloadable resources, such as annual reports, brochures, and educational materials related to the foundation's areas of focus.
9. **Contact and Support:** Offer a dedicated contact form or support section for inquiries, feedback, and assistance related to the foundation's operations.

3.3 Functional Requirements

a) Content Management System (CMS)

The website should be built on a robust and user-friendly CMS platform, allowing authorized personnel to easily manage and update website content without extensive technical knowledge.

The CMS should support multiple user roles with varying access levels for content management, moderation, and administration.

b) User Authentication and Registration

Implement a secure user authentication system for volunteer registration, donor accounts, and administrative access. Provide password recovery and account management functionalities for registered users.

c) Donation Management:

- Integrate a secure and reliable payment gateway to facilitate online donations.
- Support various payment methods, including credit/debit cards, digital wallets, and bank transfers.
- Generate donation receipts and acknowledgments for tax purposes.
- Implement donor management and tracking capabilities, including donation history and communication preferences.

d) Volunteer Management:

Enable volunteer registration and profile creation, capturing relevant information such as skills, interests, and availability.

- Provide a platform for managing volunteer assignments, tracking volunteer hours, and communicating with volunteers.
- Allow volunteers to view and sign up for available opportunities based on their preferences and qualifications.

e) Multimedia Integration:

Support the upload, storage, and display of various multimedia formats, including images, videos, and documents.

Implement a user-friendly media gallery with search and filtering capabilities. Ensure proper optimization and compression of multimedia files for efficient loading and bandwidth utilization.

f) Search and Filtering:

Implement a robust search functionality that allows users to search for specific content, initiatives, or resources across the website.

Provide filtering options based on relevant criteria, such as project types, focus areas, or beneficiary groups.

g) Responsive Design:

Ensure that the website is responsive and optimized for various devices and screen sizes, including desktops, tablets, and mobile devices.

Provide a consistent and user-friendly experience across different platforms and browsers.

h) Accessibility:

Adhere to web accessibility standards and guidelines (e.g., WCAG 2.1) to ensure the website is inclusive and usable for individuals with disabilities.

Implement features such as adjustable font sizes, colour contrast options, and keyboard navigation support.

i) Analytics and Reporting:

Integrate website analytics tools to track user engagement, traffic sources, and website performance.

Generate reports and insights to measure the website's effectiveness and inform data-driven decisions.

j) Security and Compliance:

Implement industry-standard security measures, including SSL/TLS encryption, to protect user data and ensure secure transactions.

Ensure compliance with relevant data protection regulations, such as GDPR or other applicable laws.

Regularly update and maintain the website to address potential security vulnerabilities and threats.

k) Integration and Scalability:

Design the website architecture to be scalable and extensible, allowing for future integrations with third-party services or additional functionalities. Ensure compatibility with existing systems and data sources, if applicable.

NB: These functional requirements should be further refined and prioritized based on the foundation's specific needs and stakeholder feedback during the development process.

3.4 Technical Proposal

Potential respondent to provide the following **mandatory** information.

- I. **Company Profile:** Document detailing the company including its background, Products & services, clients, and expertise.
- II. **Project execution Plan:** Comprehensive and clear project execution plan with timelines for each activity.
- III. **Project Team:** Documentation detailing the proposed project team including the Professional qualifications, experience, and role.
- IV. **Project governance structure:** document detailing the Respondent project governance structure detail the escalation matrix, risk management and problem management policy.
- V. **System maintenance and support plan:** Document detailing Respondent proposed post implementation system maintenance and support plans.
- VI. **References:** Potential vendor to provide references and summary of similar jobs undertaken in last 3 years. Kindly following details project baseline and actual timelines, project scope, project outcomes.

3.5 Financial Proposal

- I. Provide competitive financial proposal detailed financial proposal.

4 FORMAT OF RESPONSE TO TENDER

4.0 MANDATORY Information to be provided by bidders.

All bids should contain **ALL INFORMATION REQUESTED IN SECTIONS 4.1 TO 4.5**. The information should be in the following order.

4.1 General Information about the firm

Provide the following documentation in respect of your company.

- (i) **Certificate of registration** (or its equivalent) that is valid in accordance with any legally recognised jurisdiction.
- (ii) **Tax compliance certificate** (or its equivalent) that is valid in accordance with any legally recognised jurisdiction.
- (iii) Current County **Trade license/Business permit**
- (iv) **Accreditations** or a licence where applicable
- (v) **Company Profile**, with a clear **organogram** and area of speciality
- (vi) List of **Directors** (Name, ID Number/passport number, Nationality, Telephone and physical address
- (vii) Britam **Non-Disclosure Agreement** (document to be provided to accompany this RFI)
- (viii) Britam **Supplier Code of Conduct** (document to be provided to accompany this RFI)
- (ix) Britam Business Litigation and Probity; and Lead Time and Credit Period Declaration Form (document to be provided to accompany this RFI).

4.2 Bid Preparation and Submission

RFP FOR DEVELOPMENT OF BRITAM FOUNDATION WEBSITE

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All Tenders may also be posted/ delivered earlier than the deadline to the below email:

tenders@britam.com

with a clear subject line "*RFP for development of Britam foundation website RFP-2024-05/0003*"

Offers must be submitted in two separate documents, 1(one) technical- and 1 (one) commercial bid, **password protected** and clearly identified as:

- The file with the technical proposal should be identified as follows:
**NAME OF THE COMPANY, TECHNICAL PROPOSAL FOR
DEVELOPMENT OF BRITAM FOUNDATION WEBSITE**
- The file with commercial proposal should be identified as follows:
NAME OF THE COMPANY, COMMERCIAL / FINANCIAL PROPOSAL

5 GENERAL CONDITIONS OF CONTRACT

5.1. Introduction

Specific terms of contract shall be discussed with the bidder whose proposal will be accepted by the Company. The resulting contract shall include but not be limited to the general terms of contract as stated below from 5.2 to 5.14.

5.2. Award of Contract

Following the opening and evaluation of proposals, the Company will award the Contract to the successful bidder whose bid has been determined to be substantially responsive and has been determined as the best evaluated bid. Britam will communicate to the selected bidder its intention to finalize the draft conditions engagement in consultation with the bidder.

5.3. Application of General Conditions of Contract

These General Conditions (sections 5.2 to 5.14) shall apply to the extent that they are not superseded by provisions in other parts of the Contract that shall be signed.

5.4. Bid Validity Period

Bidders are requested to hold their proposals valid for ninety (90) days from the closing date for the submission.

5.5. Non-variation of Costs

The prices quoted for the service and subsequently agreed and into the contract shall be held fixed for the contract period.

5.6. Delays in the Bidder's Performance

- 5.6.1. Delivery and performance of the Transaction shall be made by the successful Bidder in accordance with the time schedule as per Agreement.
- 5.6.2. If at any time during the performance of the Contract, the Bidder should encounter conditions impeding timely delivery and performance of the Services, the Bidder shall promptly notify the Company in writing of the fact of the delay, its likely duration and its cause(s). As soon as practicable after receipt of the Bidder's notice, the Company shall evaluate the situation and may at its discretion extend the Bidder's time for performance, with or without liquidated damages, in which case the extension shall be ratified by the parties by amendment of the Contract.
- 5.6.3. Except in the case of "force majeure" as provided in Clause 5.14, a delay by the Bidder in the performance of its delivery obligations shall render the Bidder liable to the imposition of liquidated damages pursuant to Clause 5.7.

5.7. Liquidated damages for delay

The contract resulting out of this RFP shall incorporate suitable provisions for the payment of liquidated damages by the bidders in case of delays in performance of contract.

5.8. Governing Language

The Contract shall be written in the English Language. All correspondence and other documents pertaining to the Contract which are exchanged by the parties shall also be in English language.

5.9. Applicable Law

This agreement arising out of this RFP shall be governed by and construed in accordance with the laws of Kenya and the parties submit to the exclusive jurisdiction of the Kenyan Courts.

5.10. Successful Bidder's Obligations

The successful bidder:

- 5.10.1. Is obliged to work closely with Britam staff, act within its own authority, and abide by directives issued by the Company that are consistent with the terms of the Contract.
- 5.10.2. Will abide by the job safety measures and will indemnify the Company from all demands or responsibilities arising from accidents or loss of life, the cause of which is the Bidder's negligence. The Bidder will pay all indemnities arising from such incidents and will not hold the Company responsible or obligated.
- 5.10.3. Will be responsible for managing the activities of its personnel, or subcontracted personnel, and will hold itself responsible for any misdemeanours.
- 5.10.4. Will not disclose the Company's information it has access to, during the work, to any other third parties without the prior written authorization of the Company. This clause shall survive the expiry or earlier termination of the contract.

6 BRITAM SUPPLIER CODE OF CONDUCT

6.1 GENERAL

This Code is applicable to all Britam suppliers (hereinafter "Supplier" or "Suppliers") and their employees (be they temporary, casual or permanent) and sub-contractors throughout the world. Britam requires all Suppliers to conduct their business dealings with Britam in compliance with this Code and in compliance with all laws applicable to the Supplier's business, wherever conducted. By entering into business transactions with Britam, the Supplier agrees to abide by the terms of this Code and acknowledge that compliance with this Code is required to maintain the Supplier's status as a Britam Supplier. Britam shall have the right to terminate any Supplier's contract for failure to comply with the provisions of this Code. Britam recognizes that local laws may in some instances be less restrictive than the provisions of this Code. In such instances Suppliers are expected to comply with the Code. If local laws are more restrictive than the Code, then Suppliers are expected to comply with applicable local laws.

6.2 PROVISIONS

Suppliers must comply with the following:

6.2.1 Relations with competitors

Suppliers will be required to comply with applicable antitrust or competition laws and will not engage in any restrictive trade practices. Suppliers will at all times act in a manner that will uphold and encourage healthy competition.

6.2.2 Bribes, Conflicts of Interest, Gifts and other Courtesies

6.2.2.1 Bribes

Suppliers shall not make or offer bribes or payments of money or anything of value to any Britam employee or any other person including officials, employees, or representatives of any government or public or international organisation, or to any other third party for the purpose of obtaining or retaining business with Britam. For the avoidance of doubt Britam considers an act of bribery to include the

giving of money or anything of value to anyone where there is belief that it will be passed on to a government official or Britam employee for this purpose. Suppliers are required to comply with all applicable local anti-bribery laws.

6.2.2.2 Gifts and other business courtesies

Suppliers shall ensure that any expenditure incurred in relation to any particular Britam employee or government official is in the ordinary and proper course of business and cannot reasonably be construed as a bribe or so as to secure unfair preferential treatment. A general guideline for evaluating whether a business courtesy is appropriate is whether public disclosure would be embarrassing to the Supplier or Britam.

Britam employees may accept unsolicited gifts from Suppliers provided:

- they are items of nominal value – Kes1500 or less, or
- they are advertising or promotional materials having wide distribution e.g. calendars, stationaries, diaries, etc.; and
- Acceptance of the gift does not violate any applicable law.

6.2.2.3 Conflicts of Interest

No supplier shall enter into a financial or any other relationship with a Britam employee that creates a conflict of interest for Britam. A conflict of interest arises when the material personal interests of the Britam employee are inconsistent with the responsibilities of his/her position with the company. All such conflicts must be disclosed and approval to the transaction given.

6.2.3 Compliance and implementation

6.2.3.1 Licenses and Returns

The Supplier will be required to obtain and renew, in accordance with any law or regulations all permits, licenses and authorizations required for it to carry out its business. In addition, the Supplier will be required to prepare and file any returns that it may be required to file under its incorporation statute, the Companies Act.

6.2.3.2 Taxation, Financial Integrity and Retention of Records

- The Supplier will comply with all revenue laws and will not evade tax.
- Suppliers will be required to maintain accurate and reliable financial and business records and shall not have any false or inaccurate accounting books or records related to Britam for any reason. Suppliers shall maintain all business records at the minimum in compliance with the provisions outlined by the Kenya Revenue Authority or local revenue authorities from time to time.
- When any government investigation or audit is pending or ongoing then Suppliers will not destroy any relevant records until the matter has been investigated and closed.

6.2.4 Violations

If a Supplier becomes aware of any known or suspected improper behaviour by another Supplier in relation to their dealings with Britam or if a bribe or other inducement is requested from a Supplier by any Britam employee or any other person with the promise of influencing Britam's position as far as that Supplier is concerned or if the Supplier feels that a conflict of interests exists with one of Britam's employees then all pertinent details should be reported in confidence to the following Contact Address

Procurement procurement@britam.com

6.2.5 Variations

Britam reserves the right to vary this Code at any time.