



Terms of Reference

Kenya Bankers Association Request for Proposal for a
Mobile/Web Platform in conjunction with
Inuka Enterprise Capacity Building Program

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About Kenya Bankers Association (KBA)

Kenya Bankers Association (KBA) was registered as an Industry Association on 16th July 1962 by the Registrar of Trade Unions. In its formative years, the main aim of the Association was to cater for the interests of the member banks in negotiating terms and conditions of service of its unionisable employees and as far as possible standardize management practices so as to ensure harmony in the industry.

Over time, the ambition of the Association evolved to include promoting industry development and economic growth by engaging the government and sector regulator, Central Bank of Kenya (CBK). This KBA ambition was reinforced in 2012 when the Association launched its new brand and ambition statement: One Industry. Transforming Kenya.

As the umbrella body of the institutions licensed and regulated by CBK with a current membership of 44 financial institutions, KBA continues to reinforce a reputable and professional banking sector in a bid to best support Kenyans, who entrust their ambitions and hard-earned resources with its member banks.

Overview of the SME Program:

The banking industry umbrella body, Kenya Bankers Association (KBA) is sponsoring a capacity building program, targeting micro, small and medium-sized enterprises (MSMEs). The program has objectives under five (5) broad themes, namely:

1. Moving businesses and entrepreneurs from Informal to Formal Businesses.
2. Promoting Job Creation through enterprise development
3. Enhancing Access to Finance / Capital
4. Promoting Value Addition towards enhancing local, regional and international competitiveness
5. Creating Equitable Opportunities for MSMEs across the country

KBA will be developing a curriculum based capacity building program which will be deployed via online and face to face/classroom learning. This learning will be augmented via online support services including virtual coaching and networking.

To enable business owners to register to participate in this free program, a Web-based platform is required by KBA. To achieve the following:

- Provide general program information and Pre-qualify business owners to participate in the program [based on pre-set criteria]
- Provide information on dates and locations for face to face sessions [integrate with Eventbrite and Google Maps]
- Map geographic distribution/access of businesses to ensure equal opportunity and equitable access
- Enable online support, including coaching/mentoring of business owners undertaking the course
- Provide banks and other financiers with access to a database of the registered businesses as a means to pre-qualify enterprises for credit facilities
- Provide credit reference bureaus with access to a database of registered businesses so as to provide online credit reports and scores
- Creates an online network of businesses so as to facilitate business networking and trade partnerships [integration with FaceBook, LinkedIn, Instagram]
- Provide free resource material and online e-learning modules and toolkits [e.g. DTB/World Bank SME Toolkit, Barclays/ITC She Trades Program]

Preliminary Site Structure (To be Confirmed):

1. The platform will have the following levels & key sections:

- Level 1: General Information & Registration (open access)

This level will have two sections which will be accessible by the general public. The section will be a maximum of six pages of content.

- Level 2: Online Training Course (registration & minimum criteria required)

This level of online training will have Seven Modules which will be accessible by visitors who complete the registration form in Level 1; and meet the minimum threshold.

The interactive e-Learning Modules will be based on curriculum developed by Kenya Institute of Management. The platform developer will need to work closely with KIM to translate their coursework for the online/digital environment.

To ensure the most interactive and visually appealing content, the platform developer will need to translate the KIM material via a multimedia approach. Therefore, the developer will work with both internal and external resources to provide high quality graphic design, illustration, short video / podcast production, and automated PowerPoint slides with voiceover.

Each module will feature one video. Each page of the module content must have graphics and/or illustration and an interactive/clickable content to keep audiences engaged.

Each module will have a pre-assessment and post survey. All modules will also have a short quiz at the end, with an automated certificate being generated once the course participant has met the minimum pass mark.

In this section users should be enabled to engage with course instructors; and conduct facilitated group chats. The section should also have an online bulletin and marketplace functionality.

Other content for this Level will be considered, including an online bank product search and product matching capability; and access to credit reports and scores.

- Level 3: Join a Face-to-Face Course (restricted access based on passing Level 2 coursework)

This Level will be accessible by applicants who have been approved to undertake the Face-to-Face course. This section of the site should enable a user to search for the training program venue and date information by logging into the system with their profile. For 2017, the face to face program will take place in Nairobi and Nakuru.

Team Requirements:

The platform team should be comprised of expert professionals with the following capabilities.

1. Software engineer with e-learning platform development expertise
2. User experience design with user interface design expertise including animated graphic design
3. Learning Management System / LMS and Content Management System expertise
4. System and data security expert
5. User support / customer support personnel
6. Project management professional

Technical Requirements:

1. The platform should be accessible on handheld devices and the web i.e. Responsive, adaptive HTML5 output
2. The information on the platform should be easily readable on the desktop browser or mobile phone. (Should not be in portable document format -pdf).
3. Platform should support common file formats and the possibility to embed the content of such files, (including: aam,aiff, asf, au, avi, doc, gif, html, htm, jpg, jpeg, jif, mpe, mpg, mpeg, moov, mov, pdf, pps, qt, ra, ram, swa, swf, tiff, txt, wav, wpd, xls, xlsx, docx, ppt, pptx, wma, wmf and wmv)
4. The platform should have group chat and online bulletin board functionality to enable users to have online discussions and engagements that are facilitated by a moderator
5. The platform will have a "news updates" tab where KBA can communicate with participants by posting updates for them to read. KBA will therefore need an administrative access interface
6. After the completion of the course, KBA should be able to evaluate progress by gathering feedback from participants through a form. The survey should be issued automatically at pre-determined times
7. KBA should also be able to assess the geographic distribution of applicants and those who have undertaken the course
8. The platform should have the capability for banks to get leads/pipeline from trainees based on the industry of specialisation.
9. The platform should have structured user roles that defines which user has access to what information i.e. Administrator, Teacher, Student, Evaluator/Reviewer, Bank etc. and have the potential to create an unlimited number of additional roles.
10. Platform should have a User Support function (ticketing system) which pushes notifications to the platform administrator to facilitate a response.
11. The platform should be Search Engine Optimized (SEO). It should rank at the top on all search engines.

Submission Details

Closing time and date for all submitted proposals will be Noon (12:00 PM), 5th June 2017.

The submission should include Company & Team Information; as well as a Proposal to KBA. The items to be submitted are listed below. Failure to submit any of the below items may result in disqualification from the bidding process.

Company & Team Information

The following four items should be submitted to provide background information on the company and project team.

1. Company profile/information which demonstrates the ability and experience to

- build a platform that has a great user experience and user interface.
2. Project team bio information and technical qualification
 3. Three or more links of previous work on web and mobile platforms that are similar to the scope of work described above on the SME Platform.
 4. Three relevant references, of which one should be in the Financial Services Sector, preferably a KBA member bank. Each client reference should include a letter of recommendation.

Proposal & Capacity to Meet Objectives

The following nine items should be submitted as the proposal to KBA and demonstration of the company's ability to deliver on the project.

1. One Case Study of previous work undertaken highlighting project scope, how the platform was implemented, and any obstacles/challenges encountered and how they were addressed. The case study should be no more than 2 to 3 pages.
2. One Prototype of the proposed platform for KBA
3. One Proposal Summary which articulates how the Prototype Platform will be interactive and intuitive for the user. Include how the User Experience is defined and will be executed with use of graphic design, multimedia, animated graphics and layout.
4. A proposed timeline for implementation and key milestone dates
5. One Site Structure Chart outlining the Levels of the Site. At each level indicate content; user permissions; administrative function; and security feature
6. A Project Management statement, outlining how the project will be managed and the capacity of project manager for this assignment, include projects handled by the project manager of similar scope
7. A System Security statement that features security mechanisms/technologies to be used to safeguard the platform
8. A Technical Support Statement describing the IT support system that will be put in place to rectify technical issues raised by trainees and KBA
9. An estimate cost/budget and plan for the development of the platform. Budget should include 1) platform development; 2) annual maintenance contract; 3) user support system

The company should include contacts and location of their offices. KBA may conduct a site visit.

Timeline

Below are the project timelines:

1. Circulation of the RFP document: 18th May 2017

2. Proposal and design deadline 5th June 2017
3. Review of proposals and meetings with shortlisted firms: 12th June 2017
4. Commencement of developing the platform: 1st July 2017.
5. Testing of the site: 5th August 2017.
6. Final testing and debugging: 15th August 2017.
7. Completion of the project and launch of the site: 1st September 2017.
8. Site maintenance and reporting: ongoing

The Company must be able to complete the project in three months. There should be 1 month for testing.

Payment Terms

Fees and payment terms are negotiable, based on the strength of the solution proposed as well as similar KBA assignments.

Contact Information

Proposals and correspondence should be addressed to:

Roselyne Njino

KBA, Senior Communications Officer

rjino@kba.co.ke and smeprogram@kba.co.ke

Hardcopies of the tender are also required and should be delivered at KBA offices located at International Life House, 13th floor, Mama Ngina Street no later than the deadline date of 5th June 2017.