



KENYA BANKERS
ASSOCIATION

Terms of Reference

**BANKING INDUSTRY E-LEARNING CONTENT UPDATE FOR
THE “SUSTAINABLE FINANCE INITIATIVE” (SFI) UNDERTAKEN
BY KENYA BANKERS ASSOCIATION WITH FUNDING SUPPORT
FROM IFC**

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A) About Kenya Bankers Association (KBA)

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 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. The core function of the Association is promoting industry development and economic growth by engaging critical stakeholders that primarily include the government and sector regulator, Central Bank of Kenya (CBK).

As the umbrella body of the institutions licensed under the Banking Act Cap 488, with a current membership of 46 financial institutions, KBA has endeavored 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.

Under its redefined mandate, KBA has undertaken major initiatives towards the development of banking. In line with the Government's Policy of Public Private Partnerships, the Kenya Bankers Association works closely with the Regulator to ensure that Government initiatives and policies are implemented smoothly. Under this partnership, the Association and the Central Bank of Kenya have been able to implement key milestone projects such as the Real Time Gross Settlement System (RTGS), and the Currency Centre projects. KBA has also championed the modernization of the Payment Systems through the Automated Clearing House, which KBA owns and is operated with oversight by CBK.

Additionally, the Association rolled out the Sustainable Finance Initiative with the core purpose of encouraging the banking industry to create long-term value for the economy, environment and society. Through this initiative, the Association has played a significant role in enabling the banking industry to operate more optimally in the area of comprehensive risk management. It has further enhanced business practices, leadership and governance which has ultimately bolstered banks ESG performance. To augment these efforts and further support the banking public, KBA established the Inuka SME Program, a financial literacy capacity building initiative, which was designed to de-risk Micro, Small and Medium-sized Enterprises to enhance their ability to access bank finance.

B) Background on the Sustainable Finance Initiative (SFI)

Commercial banks are working together through the KBA to adopt universal principles that will guide them in balancing their immediate business goals with the economy's future priorities and socio-environmental concerns. In addition to developing Sustainable Finance Principles that are in line with international best practices and consistent with the financial sector's ambition to create long-term value for Banks, their clients and society, the SFI will help build the industry's capacity to promote financial inclusion while addressing challenges such as climate change, resource scarcity, environmental degradation and social exclusion that have the potential to undermine sustainable economic growth.

C) About the SFI Capacity Building Program

The purpose of the capacity building programme is to identify and implement activities that enable Banks to pursue the ambitions of the Sustainable Finance Principles. Implicit in this is not

only the need for Banks to equip themselves with the necessary knowledge and skills but also the need to raise awareness amongst other key actors who have a role to play in creating the enabling environment and incentivizing the desired outcomes.

Capacity Building Program Outputs:

Output 1- Raising Awareness, Building Consensus and Changing Mindsets

To raise awareness and build consensus amongst members of the commercial banking sector with programmes tailored to decision makers, middle management teams (i.e. those with responsibility for day-to-day implementation) and, through an entry level training package, a broader audience within the Banks. All activities to build the confidence of the Banking community to engage with their Clients on sustainable finance issues and to identify new opportunities.

Output 2 - Strengthening Local Advisory and Academic Institutions

To undertake activities that will build the capacity of supporting institutions to respond to the needs of the Banking sector, with a focus on the local consulting industry and tertiary education institutions delivering professional development courses for Bankers.

Output 3 - Facilitating Sustained Collaboration and Information Dissemination

To create ongoing processes that will sustain the SFI initiative over the long-term, and engage a broader group of stakeholders in appreciating and supporting the actions of KBA and its members.

D) Scope of Work

The bidder will be required to update the identified modules within KBA's SFI E-Learning platform that is enabled for PC and mobile access. The scope of work includes the review of current e-learning content, updating of the content based on the updated SFI Guiding Principles, testing and deployment.

The three (3) core sections of the microsite to be updated are as follows:

- **General Information Pages**
 - Overview of the Capacity Building Program
 - Links to Online Resources / Sites
- **E-Learning Section**
 - Update existing modules to reflect the updated SFI Guiding Principles
 - Work with the platform administrator to ensure the updated modules are dynamic and Interactive
 - Update the Self-Assessment & Ranking
 - Ensure all the downloadable materials are in line with the updated content in the SFI e-learning platform.
- **Video Section**
 - Update new Video Case Studies

Content will be submitted as MS Word Files and in some cases PowerPoint presentations. For the E-Learning Section, the developer will be required to convert and automate the content into dynamic, interactive presentations with guidance from the curriculum developer.

E) Timelines

The project timelines are as below:

- Issue of RFP document: 8 January 2025
- Deadline for receiving proposals and design concepts: 26 January 2025
- Review of proposals & meetings with shortlisted firms: February 3rdth and 4th 2025.
- Assignment of Project Contract: 30 January 2025
- Web site review, content update by curriculum developer on the website: February 2025
- Site testing: March 2025 (Saturday inclusive)
- Soft Launch: 26 March 2025
- Final testing and debugging: April 2025
- Go Live: 4 May 2025
- Site Maintenance & Reporting: Ongoing

F) Technical Qualifications

The firm/consultants should have at least ten (10) years' experience with five (5) being in the relevant field. Other qualifications include:

- Compliance to relevant Kenya law/legal statutes
- Demonstrate and proof past experience in successfully handling assignments of a similar nature
- The applicant must demonstrate competence in curriculum development in the area of Sustainable Finance and should submit at least three references, of which one should be in the Financial Services sector, preferably a KBA member bank.
- The bidder must submit the names, professional qualifications and experience of the project team which **MUST** include a Project Manager and one senior official of the company.

G) Submission Details

All proposals should be submitted by Noon (12:00pm) Monday, 26th January 2025 and should include the following Submission.

Submissions - Company

- Company Information, relevant client case studies
- Project team bio information and technical qualification

- 3 relevant references, of which one should be in the Financial Services sector, preferably a KBA member bank.
- Tax compliance certificate

Submissions – Project

- Implementation Plan & Budget

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

Shortlisted candidates will be contacted and requested to make a presentation to the KBA and IFC on February 3rd or February 2025.

H) Payment terms

Fees and payment terms are negotiable, based on the strength of the firm's ability to deliver on the scope of work as well as similar KBA assignments.

I) Contact Information

Proposals and correspondence should be addressed to

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