



## **REQUEST FOR PROPOSAL**

**SUPPLY, INSTALLATION AND CONFIGURATION OF  
WORK MANAGEMENT TOOL – MONDAY.COM**

**ISSUED ON: 12<sup>th</sup> JULY 2024**

**PROPOSAL DUE DATE: 26<sup>TH</sup> JULY 2024 AT 17:00HRS  
NAIROBI (LOCAL TIME), KENYA.**

## **1.0 INTRODUCTION**

The Company for Habitat and Housing in Africa, Shelter Afrique (SHAF), is a Pan-African finance institution created to uniquely support the development of affordable housing and sustainable urban development in Africa.

The Bank was created specifically to mobilize financial and technical resources to address the acute housing shortage prevalent in most African countries. Headquartered in Nairobi, Kenya, the bank's shareholders comprise 44 African governments and two international financial institutions, Africa Reinsurance Corporation and the African Development Bank (AfDB).

As a development finance institution (DFI), SHAF underwrites debt, equity, quasi-equity trade finance, lines of credit and advisory products to housing providers in 44-member states, who in turn, support the efficient delivery of affordable housing and attendant infrastructure.

The institution is requesting proposals for the supply and configuration of work management tool - Monday.com - to support business operations and performance tracking across the bank. The implementation will be based at the Head Office located in Upper Hill, Longonot Road.

## **2.0 BACKGROUND**

The Bank is seeking to implement a work management tool to drive its operational excellence strategic objective. Operational excellence is essential for institutions aiming to achieve sustainable success, efficiency, and competitiveness. The anticipated work management platform is expected to streamline collaboration, task tracking and management, and project management across teams. The tool is expected to provide a centralized hub where teams can plan, execute, and track work in real-time, fostering transparency and efficiency across the bank.

## **3.0 OBJECTIVES**

The main objective of procuring a work management tool is to enhance bank's ability to plan, track, and manage projects and tasks efficiently. Work management tools provide a centralized platform to streamline workflows, improve collaboration, and increase productivity.

The bank is seeking to leverage on the following features and capabilities available on work management platform to transform its operations:

- a) Project management
- b) Task management
- c) Resource management
- d) Projects portfolio management
- e) Streamlined communication & collaboration
- f) Time management & scheduling
- g) Request & approval management
- h) Business operations
- i) Goals & OKRs
- j) Reporting and analytics

#### **4.0 SCOPE OF WORK**

##### **(a) Tasks and Project Management Module:**

- Develop and design a user-friendly project management module that includes features for planning, scheduling, resource allocation, and progress tracking.
- Ensure compatibility with existing Oracle Loans disbursement systems to facilitate seamless integration.
- Enable users to create, edit, and delete projects. Include features for setting project goals, objectives, deadlines, and milestones.
- Provide templates for common project types to streamline project setup.
- Support project hierarchies with sub-projects and tasks to manage complex projects.
- Allow users to create tasks, assign them to team members, set deadlines, and define priorities.
- Manage task dependencies to ensure proper sequencing and workflow.
- Enable users to update task statuses (e.g., not started, in progress, completed) and track progress in real-time.
- Enable users to log and track the time spent on tasks and projects.
- Provide timesheet functionality for recording and approving work hours.
- Manage the allocation of resources (e.g., personnel, equipment) to projects and tasks.
- Track resource availability to prevent overallocation and ensure optimal use.

##### **(b) Service Level Management/Ticketing Module:**

- (i) **Issue Tracking and SLA Management:** - Implement a robust ticketing module with SLA tracking capabilities. Integrate Shelter Afrique issue tracking

mechanism for end-to-end incident management. In addition, it should implement Service Level Agreement (SLA) monitoring for compliance and performance metrics.

- (ii) **Problem Management:** - Facilitate problem identification, root cause analysis, and resolution workflows. - Enable proactive problem detection and recurring issue mitigation.
- (iii) **Change Management:** - Support comprehensive change management processes, including request for change (RFC) handling, impact analysis, and change approval workflows. - Ensure traceability and auditing of change implementations.
- (iv) **Asset Management:** - Incorporate an asset management module for tracking and managing the lifecycle of IT assets. - Provide asset-to-incident linkage for contextual ticket resolution.
- (v) **Report Generation:** - Enable advanced report generation capabilities, supporting custom report templates and real-time data analytics. - Provide detailed dashboards and metrics for performance monitoring and strategic decision-making. Provide comprehensive project dashboards, real time /onsite progress photographs and reports for informed decision-making.

**(c) Integration with existing tools:**

- Establish a seamless integration between the work management platform and MS outlook, ERP system - Oracle ebusiness suite, Microsoft SharePoint and electronic document and records management system (EDRMS).

**(d) Reporting**

- In addition to the prebuilt reports, the vendor will be required to provide customized reports to suit the business. Report requirements will be provided during the business requirements scoping phase.
- Provide flexible reporting capabilities to enable users to generate reports based on various parameters of the project, tickets or business leads.
- Allow the users to request regular periodic reports and one-off reports.

**(e) Training, Support and Maintenance:**

- Provide comprehensive training sessions and user manuals for SHAF staff and related counterparties on the usage of the software.
- Offer ongoing technical support and maintenance services post-implementation.

**(f) Technical and security requirements specifications**

- The system shall support encryption of data at the source or user level using Hyper Text Transfer Protocol Secure (HTTPS) protocol and Transport Layer Security (TLS) protocol.

- The System shall support both IPv4 and Ipv6 protocols as part of SHAF's efforts to adopt the new Ipv6 protocol.
- The system shall be designed and developed with Single Sign On (SSO) and Multifactor Authentication (MFA) capabilities. The System shall support the use of multifactor authentication mechanisms for authenticating transactions and events as defined by the system. These mechanisms can use a combination of the following:
  - Username and password.
  - Digital certificates
  - SMS code verifications.
  - One-Time Passwords (OTP).
  - random security code (Captcha Codes)
  - biometrics (if available).
- The System shall hash and securely store user authentication credentials using industry acceptable hashing algorithms and standards.
- The System shall maintain a complete audit trail of all write access events that include creation, modification, and deletion of records.
- The system should support configuration of time-based access for users.
- The system shall periodically check for and flag redundant or unused user accounts.
- The system shall capture the following minimum details to adequately track events performed in the system:
  - Identification of the event (the module and function accessed).
  - Type of access (create, modify, delete, read).
  - User ID performing the event.
  - Date and time the event was performed.
  - Last updated date
  - Last User ID that updated.
  - The terminal ID / location from where the event was executed (indication of physical location, if possible).
- The system shall be able to keep deleted data for audit purposes.
- The System shall not allow deleting of audit logs.
- The system shall not allow administrators to be able to change the status of system audit trail.

**(g) Documentation requirements**

- Develop and provide system installation, support, configuration manuals.
- Develop and maintain end-user documentation, including updates and release notes.

**(h) Warranty**

- The successful bidder shall provide 6 months warranty for the software and ensure it is free from any sort of defects and shall perform as per expectations.

**5.0 IMPLEMENTATION APPROACH**

The project will be implemented in phased approach over a period of six months.

PHASE	NO OF USERS
Phase I	30
Phase II	35

Phase II is dependent on the successful completion of phase I.

**6.0 EVALUATION PROCESS AND SELECTION CRITERIA:**

Responses to this RFP will be evaluated and scored based on the following:

- Technical qualifications and experience in implementing work management system for similar organizations.
- Experience of the provider of atleast three years providing similar services.
- Certified products partner of the product listed above. Attach proof.
- Similar jobs done previously.
- Organization and staffing
- Quality and clarity of the proposal presentation
- Solution comprehensiveness and feasibility
- Proposed timeline and project delivery approach.
- Compliance with regulatory authorities
- Financial proposal
- Attach Annual Maintenance Contract Agreement.

The contract will be awarded to the bidder whose offer represents the best value to Shelter Afrique, taking into account the professional and technical capacity, the quality of offer and the price.

The final selection will be based on 70% technical and 30% financial. Shelter Afrique however reserves the right to negotiate with the selected firm his/her remuneration in line with the budget.

Each bid will be given a technical score. A proposal shall be rejected at this stage if it does not respond to important aspects of the Terms of Reference or if it fails to achieve the minimum technical score of 50%.

The formula for determining the final scores (sf) is the following:

$S_f = 100 \times F_m / F$ , in which  $S_f$  is the financial score,  $F_m$  is the lowest price and  $F$  the price of the proposal under consideration.

Final score computed as follows:

$$\text{Final Score} = 0.3 S_f + 0.7 S_t \text{ with } S_t \text{ being the technical score.}$$

## 7.0 PRESENTATION OF PROPOSALS

In order to facilitate the analysis of responses to this RFP, firms are required to prepare their proposals in accordance with the instructions outlined in this section.

Proposals should be clear, comprehensive and concise in description of the firm's capabilities to meet the requirements provided in the RFP.

The proposal should **STRICTLY** adhere to the format provided below.

### 7.1 TECHNICAL PROPOSAL FORMAT

**Table 2: Technical proposal format**

Section	Title
1.0	Company registration and statutory requirements
2.0	Introduction or company profile
3.0	Company Experience
4.0	Technical approach and methodology
5.0	Organization structure and staffing
5.0	Resumes of key staff to be deployed

The following sections provide detailed information on proposal format.

#### 7.1.1 Company registration and statutory requirements

Provide copies of the following information. Originals will be required for presentation after successful bidder.

**Table 3: Mandatory information**

	Requirement	Response
i)	How long has company been in business?	
ii)	How long has been the company been in business carrying out similar projects?	

	Requirement	Response
iii)	State the number of employees in the company (where applicable)	
iv)	Submit copies of:	
	a) Certificate of incorporation	
	b) Tax compliance certificate	
	c) Financial statement for the last three years.	
	d) Certificate of Confirmation of Directors and Shareholding (CR 12)	
	e) Manufacturer's Authorization Form (MAF) (if not the system developer)	
vi)	Must have completed two implementation projects of similar nature preferably a financial institution such as development finance institutions.	

### 7.1.2 Introduction

This section should include a brief description on the company profile covering products and services offered. It should also include brief narrative on the company's proposal and its suitability for this project.

### 7.1.3 Company Experience

Using the format given below, provide information on each assignment you have conducted relevant to the requirements provided in this RFP.

The company **MUST** have been in business for atleast **four** years carrying out similar projects. The section should strictly adhere to the format provided below.

**Table 4: Company experience**

<b>Assignment Name:</b>	<b>Approximate value of services (USD.):</b>
<b>Name of client (or Sector if no disclosure for confidentiality):</b>	<b>Country of assignment:</b>



<b>Address:</b>	<b>Professional staff provided by your firm and their roles:</b>
<b>Duration of assignment:</b>	
<b>Name of Associated Consultants, if any:</b>	<b>Roles of associated consultants:</b>
<b>Narrative Description of the project:</b>	
<b>Description of actual services provided by your firm:</b>	
<b>Contact Person</b> <b>Name:</b> <b>Phone:</b> <b>Email:</b> <i>Confirm whether you have any reservations in Shelter Afrique contacting the entity with your authorization.</i>	

#### **7.1.4 Technical approach and methodology**

Provide a detailed explanation on technical approach and methodology to be deployed in order to achieve the assignment objectives and expected output.

This should include proposed solution design and project plan giving clear timelines and resources required.

#### **7.1.5 Organization and staffing**

In this section, provide your current company structure and propose the project team structure clearly stating their roles and experience in implementing similar projects.

Staff deployed for this project must meet the following minimum qualifications:

- a) Must have bachelor's degree in computer science, information technology, information systems, or related.
- b) Proven experience in implementation of proposed system and above for a client in financial sector.
- c) Relevant certifications will be an added advantage.

### **7.1.6 Resumes of key staff to be deployed.**

Provide resumes and copies of certificates of key personnel to be deployed in this project.

## **7.2 FINANCIAL PROPOSAL FORMAT**

Interested developers are required to submit a detailed cost proposal outlining the cost breakdown of the following:

- Software costs.
- implementation costs
- Training costs
- Maintenance and support costs for the initial year and subsequent years

The financial proposal should be well itemized as per the scope of work and list of services to be supplied and the phased approach.

The financial proposals should be expressed in **United States Dollar (US\$)** and inclusive of taxes but with clear breakdown.

Financial proposal should be presented **separately** from the technical proposal.

**Note that payment will be made based on project milestones. Therefore, the proposal should align with the project plan.**

## **8.0 CLARIFICATION OF REQUEST FOR PROPOSAL**

Companies may seek clarification on this RFP only up to 1 day to end of submission date. This should be requested in writing to email given in [section 12](#).

Shelter Afrique will respond by email or a letter.

## **9.0 SUBMISSIONS**

Proposals should be sent by email to [procurement@shelterafrique.org](mailto:procurement@shelterafrique.org) with subject as response: RESPONSE TO TOR FOR SUPPLY OF WORK MANAGEMENT TOOL

Or submitted in a sealed envelope addressed to the address below, not later than 26<sup>th</sup> July 2024 at **1700 hours**.

**Procurement  
Shelter Afrique, Longonot Road, Upper Hill**

**P.O. Box 41479 - 00100, GPO Nairobi, Kenya.  
Tel: 254-20-2722305-9  
Fax: 254-20-2722024, 2721211**

**For any clarification contact us via [procurement@shelterafrique.org](mailto:procurement@shelterafrique.org)**