# Request for Proposal: Policies, Manuals & Guidelines Management Portal

## 1    Introduction

Africa Re has initiated a Request for Proposal (RFP) process to identify a vendor qualified to plan, execute and deliver a policy and guidelines management portal using Microsoft SharePoint.

The Corporation requires a vendor who has demonstrated experience and expertise using Enterprise Wiki feature of Microsoft SharePoint for content publishing, content usage, content creation and content maintenance.

## 2    About Africa Re

African Reinsurance Corporation (Africa Re) is an International Financial Institution established on 24 February 1976 with Headquarters in Lagos (Nigeria). Africa Re has six Regional Offices in Casablanca (Morocco), Nairobi (Kenya), Abidjan (Côte d'Ivoire), Ebene (Mauritius), Lagos and Cairo (Egypt) as well as a wholly owned subsidiary in Johannesburg (South Africa).

Africa Re, the leading reinsurance company in Africa and the Middle East, is a for-profit pan-African financial institution with diplomatic status in its current 41 African member countries. Its shareholding is split between African (75%) and Non-African (25%) investors. African shareholding comprises 41 African states, the AfDB and more than 114 African insurance/reinsurance companies from the 41 member countries.

The corporation was founded with the following mission:

- Develop the insurance and reinsurance industry in Africa.

- Promote the growth of the African underwriting and retention capacities.

- Support of African economic development.

## 3    Background and Context

Today, collaboration (people working together) is the driving force for creating value behind most organizations.  As Information and Communication Technology (ICT) has come to affect every facet of our personal and working lives, the traditional meaning of collaboration has shifted slightly. Collaboration is now almost synonymous with digital collaboration - people work with digital documents, use a range of software systems, and predominantly interact with each other electronically.

It is in that context that the Corporation has initiated the Microsoft SharePoint Enterprise Wiki project which is an internal publishing site for accessing and sharing updated information within an organization. This project presents great value propositions and is in line with the digital innovation pillar of the 2019-2023 ICT Strategy which recommends implementing initiatives that will infuse innovative solutions to fuel digital transformations of the Corporation.

There are numerous organizational artefacts and informational assets that has been developed by the Corporation over the years. However, the following challenges have been observed:

- **Document Size**: Some of these documents are too large and are difficult to carry around.

- **Document Format**: Original editable versions are either corrupted or unavailable which makes it difficult to review and manage these documents.

- **Documents Version Control**: Some of these documents have undergone some reviews which are sometimes difficult to track and manage. Some of the reviews are in the form of administrative instructions that are sometimes not linked to these documents.

- **Organizational Knowledge**: Some of these documents have implicit interpretations and sometimes consistency in interpretation has been a challenge.

- **Documents Access**: Some of these documents are sometimes accessible by the wrong people or are not available to the right people.

## 4 Benefits

The following key benefits are expected to be derived from this digital innovation initiative:

- **A single version of the truth** - SharePoint Enterprise Wiki supports structured data and content in a wide variety of ways, allowing the creation of an Enterprise Content Management system that acts as a single repository that is designed to both store and share information (Rules, Policies, Procedures, Guidelines or tutorial) on an enterprise-wide scale.

- **Findability of information** - SharePoint includes search engines ever that makes finding the right content a faster more interactive experience.

- **Enhance internal collaborative** - SharePoint Enterprise Wiki is best suited to be an internal, collaborative, version-controlled tool for knowledge management and sharing. The information (Rules, Policies, Procedures, Guidelines, etc.) will be centrally managed, accessible enterprise-wise and enabling staff to work together better.

- **Integration with Microsoft office tools** - the seamless integration of SharePoint with Microsoft Office will provide the advantage of using a single platform that is user-friendly to staff of the Corporation.  Africa Re's staff members are already familiar with Microsoft Office suite and as a result, the onboarding time and efforts will be reduced (short learning curve).

- **Allocating the right resources** - The documents uploaded to the central repository will be made available to users on need to know basis.

- **Proxy access to relevant external website**: Links with external governance sites (sites built to support governance of areas like financial/insurance sector regulations or legal requirements) will enhance staff productivity.

## 5 Scope of Work

The selected vendor will help the Corporation to implement **Enterprise Wiki** site feature of **Microsoft SharePoint** on **Office 365**. The vendor will also be responsible for migrating existing documents to the portal in a wiki format. However, with a detailed Knowledge Transfer, the business owner can conduct support the vendor through this process.

It is expected that:

- The solution will help with digitizing documents for ease of access across platforms, channels or devices.

- The solution will help with version management of documents as well as relevant sections of the wiki pages that are modified.

- The solution will also have a Frequently Asked Questions (FAQs) section for enquiries relevant to sections of a policy.

- The solution will provide workflows for clarifications of different sections of the policy. The questions asked will be sent to the custodian of the policy for contextual interpretation and guidance.

- The solution will be available in our official languages (English and French).

- The solution will have a document management section for downloading the consolidated version of the policy or guideline in PDF or Microsoft Word format.

- The solution will also have an embedded search functionality.

- The solution will also management privileges and entitlements on a need to know basis.

## 6    Terms of Reference

The terms of reference for this project are implemented in line with the background information provided.

### Term of Contract

- The initial term of contract for the portal will be negotiated at the time of contract award.

### Vendor Selection and Contract Award

- Africa Re will conduct the selection and contract award in the following manner:

  - ✓ This document will be posted on www.africa-re.com  as well as distributed to a few select vendors.

✓ Proposals will be received and evaluated as described in the RFP. Selected vendors will be asked to make oral presentations to Africa Re. During this phase, it is expected that each vendor will come with a proof of concept with appropriate design mock-ups.

## 7 Methodology

A participatory methodology will be preferred where various stakeholders in the Corporation are consulted. The proposal should clearly outline the approach to be employed by the Consultant in undertaking all the elements of this project.

## 8 Proposal Format

Vendors will prepare proposals in compliance with all the instructions outlined in the RFP. Partial or Incomplete proposals will be rejected. A vendor official with legal authority to bind the vendor must sign the proposal. All proposals must be firm for acceptance within 30 days following the proposal opening. Africa Re will not pay for any expenses incurred by vendors during the proposal process.

Vendor's proposals in response to this RFP will be incorporated into the final agreement between Africa Re and the selected vendor. The submitted proposals should include responses to each of the following sections in the proposed format:

- **Company Background**

    ✓ Provide contact information for the principal individual(s) to be contacted regarding the information in this RFP.

    ✓ Provide information for the person authorized to contractually bind the organization for any proposal against this RFP.

    ✓ Provide a brief history of your company, the official registered name, the location of corporate headquarters and offices, company leadership, and the number of employees.

    ✓ Is the company a private or publicly traded company? Please provide evidence of the company's financial stability and projected longevity. Please indicate any

planned mergers or acquisitions. Please indicate if your company is currently in bankruptcy proceedings.

✓ What sets your company and its products apart from your competitors? What is your competitive advantage?

✓ Provide a few sentences that describe how you solve business issues for clients. What is your overall value proposition?

- **Implementation Approach and Timeline**

    ✓ How will this project be implemented? How long will it take?

    Below are some identified activities:

| | Activities | Deliverable |
|---|---|---|
| | **Activities** | **Deliverable** |
| 1. | **Requirement Gathering** | Functional Specification Document |
| 2. | **Enterprise Wiki Structure Design and Document Library** | Design Specification Document<br><br>*The files can be downloaded in PDF from the Library or referenced online.*<br><br>*The design must be extensible to other in-house policies.* |
| 3. | **Theme and Layout** | |
| 4. | **Multi-Lingual Configuration** | |
| 5. | **Document Upload and Formatting** | • Rules<br><br>• Policies<br><br>• Procedures<br><br>• Manuals and Guidelines |
| 6. | **Policy Clarification Enquiry** | Workflows |
| 7. | **Access Rights and Privileges Configuration** | System Entitlement Document<br><br>• Permissions |

| | | |
|---|---|---|
| | | • Roles (*System Administrator, Business Owner and End User*) |
| 8. | **System Testing** | • Unit Test<br>• Integration Test<br>• Performance Test<br>• User Acceptance Test |
| 9. | **System Documentation** | • System Administrator User Guide and Quick Cards<br>• Business Owner User Guide and Quick Cards<br>• End User Guide and Quick Cards |
| 10. | **User Training** | • System Administrator<br>• Business Owner Administrators<br>• Central Departments<br>• Regional Offices<br>• Subsidiaries |
| 11. | **Project Closure** | Sign Off |

This is not exhaustive and will be modified before and during the project.

- **Features and Functionalities**
    - ✓ Please list all the features of Microsoft SharePoint especially Enterprise Wiki that will be unlocked to deliver value for the Corporation.
- **Services and Support**
    - ✓ Please list all training and documentation that is offered around your system.

- ✓ Describe your after-implementation support (immediately after go-live) that ensures system stability.

- ✓ Describe your ongoing technical Support model, escalation procedures, communication, time zones and forums

- **Additional Information**

  - ✓ What additional information should Africa Re consider regarding your company, products, or market focus?

- **Detailed and Itemized Pricing**

  - ✓ Provide your cost components and an estimate of each.

- **References**

  - ✓ List at least 3 (three) companies/customers as references on a ~~related~~ similar project. State company name, address, contact name and telephone numbers, installed and supported software and/or creative services and duration of relationship

- **Resumes**

  - ✓ Applicable resumes of the project team should be included.

9   **Evaluation Criteria**

The 80/20 preference point system will be used to evaluate the submitted bids with 20 points allocated to the commercial proposal and the remaining 80 points for the technical proposal.

The RFPs of responding firms will be rated among others in terms of:

- ✓ **Proposal Completeness**: Responsiveness to the RFP and demonstrated understanding of the issues surrounding the project.

- ✓ **Methodology**: The thoughtfulness and appropriateness of the proposed methodology used to accomplish the desired results of the project.

- ✓ **Management Experience and Personnel Qualification**: The experience and qualifications of the individuals specifically proposed to execute and manage the project.

✓ **Company Experience**: The experience of the firm making the proposal.

✓ **Competence**: The capability to execute the plan on time, within budget and proposed scope.

## 10  Clarification and Amendments

Vendors may request for clarification only up to 7 days before proposal submission date. Any request for clarification must be sent in writing by email to the corporation address indicated below. The Corporation will respond by email to such requests and will send written copies of the response (including an explanation of the query but without identifying the source of the inquiry) to all vendors who intend to submit proposals. There are also sample projects that can be shared with vendors on request.

**Contact for clarification:**

The Chairman of the Tenders Committee

African Reinsurance Corporation

Plot 1679 Karimu Kotun Street

P.M.B 12765, Victoria Island.

Telephone:     +234 (1) 461 68 20 / 461 68 28 / 2800724-5

Fax:             +234 (1) 2800074

Email:          icttender@africa-re.com

## 11  Proposal Submission

The Proposals, which must be triplicate copies sealed in an envelope, must be sent through email or delivered to the submission address indicated below and received by Africa Re not later than 31st July 2019.

Any proposal received by the Africa Re after the deadline for submission shall be rejected.

**Submission Address:**

The Group Managing Director/Chief Executive Officer

African Reinsurance Corporation

Plot 1679 Karimu Kotun Street

Victoria Island PMB 12765 Lagos, Nigeria


**Email: tender@africa-re.com**


**Corneille KAREKEZI**
**Group Managing Director/CEO**