

**5<sup>th</sup> April, 2023**

Dear Sir/Madam,

**RE: REQUEST FOR PROPOSAL (RFP) -FOR A ROBUST EARB INTERGRATED MEMBER MANAGEMENT SYSTEM AND FINANCIAL SYSTEM**

Estate Agents Registration Board (EARB) is the regulatory body for real estate agency practice in Kenya. EARB derives its mandate from Estate Agents Act, 1984 Cap 533 which was operationalized in 1987. The mandate of the Board is to register estate agents and ensure that the competence and conduct of the practicing agents are of a standard sufficiently high for the protection of the public.

EARB invites sealed Proposals from eligible and competent registered firms/individuals for the PROVISION OF A ROBUST EARB INTERGRATED MEMBER MANAGEMENT SYSTEM AND FINANCIAL SYSTEM. More details on the services are provided in the attached Terms of Reference (TOR).

A firm will be selected under Quality and Cost Based Selection (QCBS).

Bidders submitting the RFP should be able to demonstrate and substantiate through their references and profiles that they have the requisite experience, capability and capacity both technically and financially to execute the assignment.

The Technical and Financial proposals should be submitted separately as two separate documents, each as an individual e-mail attachment submission; and must also be password protected documents in PDF format. The password for each of the two respective documents will be formally requested for once the evaluation committee convenes.

The Technical Proposal subject e-mail shall be clearly marked “TECHNICAL PROPOSAL FOR A ROBUST EARB INTERGRATED MEMBER MANAGEMENT SYSTEM AND FINANCIAL SYSTEM – [NAME OF FIRM/INDIVIDUAL BIDDER]” and the Financial Proposal clearly marked “FINANCIAL

PROPOSAL FOR A ROBUST EARB INTERGRATED MEMBER MANAGEMENT SYSTEM AND FINANCIAL SYSTEM – [NAME OF FIRM/INDIVIDUAL BIDDER]”.

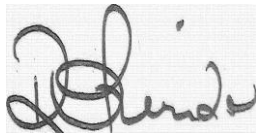
**Late bids will not be accepted.**

Technical proposals will be evaluated, thereafter and only firms/individuals who meet the minimum technical score will be formally invited for financial proposals opening in accordance with the RFP Criteria.

RFP Documents addressed as indicated below should be Addressed to the Registrar, Estate Agents Registration Board and submitted by email to: [info@estateagentsboard.or.ke](mailto:info@estateagentsboard.or.ke), [estateagentsrb@gmail.com](mailto:estateagentsrb@gmail.com) and a hard copy must be submitted to the board by Friday 21<sup>st</sup> April, 2023, 4.00pm Kenyan time.

The Board reserves the right to terminate this process at any stage without explanation and to accept or reject any bid. Only successful bidder/s will be notified.

Yours faithfully,

A handwritten signature in black ink, appearing to read 'Rose Nabiswa', is placed over a light gray grid background.

**ROSE NABISWA**

**REGISTRAR**

**ESTATE AGENT REGISTRATION BOARD.**

## **IMPORTANT NOTICE AND INFORMATION TO BIDDERS**

The information contained in this RFP, except where the context requires otherwise, has been based on the assumption that the proposed assignment is implemented as described herein. Whilst EARB considers that the assumptions on which this document is based are reasonable, it must be recognized that the reliance that you place on them is a matter of commercial judgment for the bidders alone.

1. This RFP is confidential and personal to you. It is provided to you on the understanding that it is not to be duplicated or distributed to any other person (s) or institution (s).
2. The Bidder shall be deemed to have carefully examined all of the terms, conditions and requirements of this RFP, and also to have fully informed itself as to all conditions affecting this assignment. Failure to do so is at the Bidder's risk, and no claim will be considered at any time for reimbursement of any expenses incurred as a result of any misunderstanding with regard to the conditions imposed by this RFP.
3. Unless the context otherwise requires, words importing one gender include all other genders and words importing the singular include the plural and vice versa.
4. Bidders are advised to submit a declaration statement of not engaging in corrupt activities.
5. Bidders are advised that they are required to serialize the pages of their RFP document and submit the number of copies stated under instructions to bidders' section.

## **NOTES:**

- 1.0 Any reference to a statutory provision shall be deemed to include a reference to any statutory modification or re-enactment of it.
- 2.0 The Word Proposer/Consultant/ Tenderer/ Bidder/ Service Provider in this RFP means the same—The consultant.

## **TERMS OF REFERENCE(TOR)**

### **REQUEST FOR PROPOSALS FOR A ROBUST EARB INTERGRATED MEMBER MANAGEMENT SYSTEM AND FINANCIAL SYSTEM.**

<b>SYSTEM MODULE REQUIREMENTS</b>	<b>DETAILS/BRIEF EXPLANATION OF NEED</b>
Membership data management functionality	<ul style="list-style-type: none"><li>✓ The system should capture members' bio data old and new. Including names, academic qualifications, professional qualifications, their EARB member number, year of registration, any professional misconduct information, list of registered members, those under application, those admitted and awaiting certificate etc</li><li>✓ Manage communication within the platform through emails, SMS, and push notifications. (Bulk Emails and Bulk SMS')</li></ul>
Member Portal	<ul style="list-style-type: none"><li>✓ A robust member friendly system where members can add their details eg emails, statements, download their invoices, book for trainings, pay online through Mpesa or bank and upload payment proof.</li><li>✓ Receive prompts and updates on board activities, download their practicing certificates, view their CPD points etc</li><li>✓ Robust system where members can submit annual accountants' certificate, professional indemnity and CPD clearance to the board and other regulatory compliance requirement</li></ul>
Back end use of system	<ul style="list-style-type: none"><li>✓ Ability to key in data, generate membership data summary and invoices, receipting/capturing receipts, has approval levels, and can integrate well with quick books</li><li>✓ Approve members' registration and applications. Create membership packages with charges where applicable. Edit and Delete members.</li><li>✓ Post activities, events, and news to members. View and print member's records.</li><li>✓ View Payment records. Generation of subscription invoices. Receipt generation Certificate Generation Add or Remove a payment method.</li></ul>

	<ul style="list-style-type: none"> <li>✓ Disciplinary proceedings of the complaints raised Ability to handle membership issues, whether presented by phone, email, text, or in person, keep track of its resolution, and provide a feedback mechanism immediately afterward.</li> <li>✓ Track membership graduation and qualify/disqualify them to a level.</li> <li>✓ Manage communication within the platform through emails, SMS, and push notifications. (Bulk Emails and Bulk SMS') Viewing Member Activity</li> </ul>
New member recruitment module/functionality	<ul style="list-style-type: none"> <li>✓ Ability to make application online, with mandatory fields where the process is not complete until all fields of the application form is fully filled.</li> <li>✓ Feedback mechanism, notification on the application linked to a payment method for the application fees, once receive approval for interview, ability to accept and make interview payment.</li> <li>✓ Ability to undertake remote shortlisting and sent notification to all on the outcome.</li> <li>✓ Ability to generate reports on this process at a given time.</li> <li>✓ Ability to capture application and interview data for all the applicants and candidates interviewed</li> </ul>
Training, publicity, public relations and Board event management	<ul style="list-style-type: none"> <li>✓ Ability to manage the annual training calendar and board programs.</li> <li>✓ Members should be able to view the programs, book for any event, pay for the same, receive training materials, get a virtual link for the booked program.</li> <li>✓ Evaluation of the program and downloading certificates,</li> <li>✓ Ability to link and integrate well with social media, host materials, articles, photos, past events etc</li> <li>✓ Managing the Board events from the System where members can register for an event from their portal.</li> <li>✓ Automation of attendance to be done using a QR code scanning. Events Certificate Generation-System generated certificates for members who attend an event</li> </ul>

Customer management functionality and Disciplinary procedure as per the Act functionality	<ul style="list-style-type: none"> <li>✓ Robust system where members, customers can raise complaints and complements. Feedback mechanisms, fraud reporting and financial reporting</li> <li>✓ Ability to generate a report on the process</li> <li>✓ Flexible system where public or interested parties can raise a misconduct complaint against a member/its service. A prompt or notification is sent on sms or email, A call for inquiry by the board to the member online and a feedback mechanism is available to the aggrieved party.</li> </ul>
Finance and HR functionality	<ul style="list-style-type: none"> <li>✓ Ability to generate member invoices, prompt agents of annual dues at a particular time, send reminders, generate member comprehensive statement, upload payment receipts, link with paybill/mpesa payments, integrate well with quick books.</li> <li>✓ Ability to generate financial reports, supplier management and payments. Petty cash and imprest management, etc</li> <li>✓ HR functionality ability to manage employees, performance management tool, their data, leave days management, payroll management and generation. Statutory deductions and reports</li> </ul>
CPD Program monitoring functionality	<ul style="list-style-type: none"> <li>✓ Ability to allocate CPD points to each programme/event</li> <li>✓ Capturing of those CPD points to specific member who participated in the member portal, quarterly/monthly/annual summation of the points at given time, prompts on progress, remedy program for CPD points.</li> <li>✓ Board set minimum attainable CPD points for each year and automatic issuance of CPD Compliance certificate.</li> </ul>
Board activities functionality	<ul style="list-style-type: none"> <li>✓ Board calendar, scheduled meetings, trainings, updates and prompts on important dates</li> </ul>
Reports	<ul style="list-style-type: none"> <li>✓ Ability to generate various reports for decision making including active member data, dormant members, Training data, CPD report, interview reports, successful new members report, financial reports etc</li> </ul>

**Financial proposal**

This should include the following:

ITEM	AMOUNT (KSHS)	VAT (KSHS)	AMOUNT VAT INCLUSIVE
INITIAL COST			
HOSTING COST			
MAINTENANCE COST			
LICENSE/RENEWALS			
<b>TOTAL</b>			

**Other important information required is:**

1. Turnaround time for the maintenance and support services
2. Warranty period if any
3. Improvement of the terms of reference is highly encouraged