



REQUEST FOR PROPOSAL

BUSINESS INTELLIGENCE AND SELF SERVICE DATA VISUALIZATION

**TENDER REF: NO. UCSCS/RFP/07/2021-
PROVISION OF BUSINESS INTELLIGENCE AND
SELF SERVICE DATA VISUALIZATION**

CLOSING DATE 13TH MAY 2021

Bids to be address to

**CHIEF EXECUTIVE OFFICER,
Ukulima Sacco Society Limited
P.O. Box 44071 - 00100
NAIROBI**

**And dropped in the tender box on or before 13th May 2021 at 2nd floor
Ukulima Co-operative House Nairobi.**

Ukulima Sacco Society Limited reserves the right to accept or reject any tender either wholly or in part and is not bound to accept the lowest or any tender or assign reasons thereof.

IMPORTANT NOTES TO THE VENDORS

Bidders are responsible to understand the scope of this RFP and to comply with the requirements specified in it. Bidder must provide accurate responses to the requirements within this document. References to external documents or websites will not be considered. Failure to comply to with any of the requirements in this RFP could cause the rejection of the bidder proposal. The responses of the bidder to this RFP will become the property Ukulima Sacco Society Ltd. Ukulima Sacco Society Ltd reserve the right to use any information in this proposal to Ukulima Sacco Society Ltd benefit.

INSTRUCTIONS

- 1) The response document is to be fully and comprehensively completed in all respects.
- 2) All documents must be submitted in English.
- 3) You may be asked to clarify your answers or provide more details.
- 4) Ukulima Sacco Society Limited will examine the documents to determine completeness, general orderlies and sufficiency of response. Failure to complete this questionnaire and/or to provide written answers to any further questions or requested additional information for clarification will result in the supplier's elimination from further consideration.
- 5) Please note that by responding to this questionnaire you accept that all answers provided in this questionnaire are LEGALLY BINDING and should a need arise, may be used as evidence in any court of law. Further Ukulima Sacco Society Limited reserves the right without further recourse to verify at its own cost the accuracy of any answers provided therein.
- 6) Information given by the applicant shall be treated in strict confidence.
- 7) Applicants to note that this DOES NOT amount to any contractual obligation on the part of Ukulima Sacco Society Limited and Ukulima Sacco Society Limited is not obliged to place orders with any of the respondents to this RFP.
- 8) Where insufficient space has been provided on the questionnaire, additional answers may be provided as supplementary on separate sheet bearing rubberstamp and signature of a senior person in the Organization.
- 9) The original document shall be prepared in indelible ink. It shall not contain interlineations or overwriting, except as necessary to correct errors made by the supplier. Any such corrections must be initialed by the person(s) who sign(s) the document.
- 10) The completed document shall be signed off and initialed by the authorized signatories of the organization.
- 11) Applicants will meet all costs associated with the preparation and submission of their applications.
- 12) Canvassing will lead to automatic disqualification of the applicant.
- 13) Submission is per instructions given in the Invitation to Tender.
- 14) Late submission will not be acceptable. Any application(s) received after the date and time of closure will not be considered.

15) Tender document to be charged kshs. 1000/= payable through Ukulima Fosa Nairobi.

16) (RFP) Tenders will be opened immediately thereafter through Zoom due to health protocols for those who choose to attend the (RFP) Tender opening at Ukulima Sacco Boardroom on 2nd Floor Ukulima Co-operative House.

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1.0 INTRODUCTION

Ukulima Sacco Society Limited is a Savings and Credit Co-operative Society registered in 1972 under the Co-operative Societies Act of the Laws of Kenya with the core business of mobilizing savings and extending credit to its members. The Sacco also offers related financial products and services primarily to its members who are distributed in all counties of the republic of Kenya thereby empowering them economically and socially.

Ukulima Sacco is a Deposit Taking Sacco (dts) with seven FOSA branches operating outside the headquarters in Nairobi.

2.0 OBJECTIVES

Ukulima Sacco Society Ltd wishes to invite vendors to implement an on premise business intelligence and self-service data visualization tool based on the requirement identified in this document. Both Financial and technical responses are required.

Ukulima Sacco Society Ltd has identified this gap and plans to implement a platform that will empower business users to create quick visualized reports and Dashboards. With the help of new generation tools Ukulima Sacco Society Ltd wishes to generate interactive reports and visualizations in an agile manner.

Ukulima Sacco Society Ltd is looking for a Business Intelligence and Self Service Data Visualization solution capable to respond to its expectations and requirements as described in this RFP. Ukulima Sacco Society Ltd is inviting Vendors with experience in implementing business intelligence tools in a consultative approach to participate to this tender process.

Please send one (1) original hardcopy of your completed RFP to the address below. Your RFP must be received by Ukulima Sacco Society Ltd by no later than 12:00pm on 13th May 2021.

It is the bidder's responsibility to deliver their proposal on, or before this deadline. Proposals received after the time specified will be considered late and may be disqualified at Ukulima Sacco Society Ltd discretion.

3.0 BIDDER'S COMPANY PROFILE

This section outlines the requirements for Vendors to describe the overall Company Profile information. The information provided must include but is not limited to the following.

- Company Background
- Local Presence
- Training Services
- Cvs of key technical personnel
- References

3.1 Mandatory Requirements

You shall be required to attach the following mandatory documents where applicable.

- 1) Manufacturer's authorization form.
- 2) Certification of Incorporation
- 3) PIN Certificate
- 4) VAT certificate
- 5) Tax Compliance Certificate (TCC)
- 6) Attach Ukulima Sacco payment receipt
- 7) Bid Bond of 2% of the tendered sum
- 8) Profile of Directors, Telephone numbers, email and their postal addresses

3.2 Evaluation Criteria

The Bidder will be evaluated based on the following:

- Response & Compliance to the RFP Requirements (Business & Application)
- Implementation Plan
- Previous experience in providing a similar solution
- Qualifications of Key implementation team
- Technical Capability
- Demo of the Tool
- Overall cost of Solution
- Company Profile (provide details of local presence)

4.0 SCOPE OF WORK

The Scope of Work shall include but may not be limited to:

- 1) Supply and install of the Software Packages / Tool as per the requirements of this RFP.
- 2) Customization and/or configuration of the proposed software.
- 3) Integration into the Ukulima Sacco Society Ltd ICT landscape and implementation of the required business and technical processes.
- 4) Integrate the data from various sources and perform ETL (Extract Transform & Load).
- 5) Onsite Training and Hand over by local SW Vendor (Mandatory requirement).
- 6) The solution should provide a minimum of 5 user access to the BI tool.

5.0 TECHNICAL REQUIREMENTS

This section outlines the requirements of the solution that Ukulima Sacco Society Ltd intends to implement to satisfy the reporting requirements.

5.1 Technical Capabilities

The solution should:

- 1) Render both preconfigured and user-customized visual displays of data and trends into digital interactive dashboards.
- 2) Aggregate data from a data warehouse, local databases, Excel and flat files.
- 3) Provide an on premise or a cloud solution.
- 4) Be easy to administer from license point of view.
- 5) A single license should provide the full spectrum of tools required for implementing BI.
- 6) This single license should include the capabilities of ETL, data warehouse and reporting to an interactive dashboard.
- 7) License should provide the users the ability to convert the graphs and charts into reports in spread sheets & PDF.
- 8) Not require a pre-defined cube structure. As senior management and analysts request new reports across different aspects of the business, they must be able to quickly and easily collate the information without needing to go to ICT for support.
- 9) Users should experience zero wait time as the application performs the calculations needed to deliver the aggregations users request.
- 10) The application should integrate and standardize data from the disparate data sources into an easy-to-understand interactive visual display.
- 11) Is highly configurable and flexible to support numerous graphical representations that can be navigated by non-technical end users.
- 12) Dashboards should be available on all mobile devices without the need for additional development. The preference is for HTML 5 format, without the need to install specific software on mobile devices and should have the same analytics capabilities as the desktop version.

5.2 Dash Boards

The Following is the planned scope of interactive dashboards. However this should include the following but not limited to:

5.2.1 Loan Portfolio Performance

- Loans Overview
- Product performances
- Credit Officer Analysis
- Branch Performance
- PAR Analysis
- Loans History
- Loan delinquency analysis

5.2.2 Deposits and Shares Analysis

- Deposits and shares Overview
- Product performances
- Branch Performance
- Deposits Trends
- New to Bank deposit analysis

5.2.3 Customer Intelligence

- Transaction history (deposits and shares and savings)
- Customer demographics (by branch and Location)
- Product preferences
- Multi-channel history
- Audit on KYC Mandatory fields

5.2.4 NPL Analysis

- NPL collection
- NPL movement
- Classification of Loans a per Organization classification
- NPL collection vs Target by officer

5.2.5 Expense Analysis

- Expense KPIs defined by Management
- Year on Year Comparison of Expanses
- Comparison of Expanses over current year Budget
- Expense trends of various expense classifications
- Expenses per Dept.

5.2.6 Income Analysis

- Income KPIs defined by Management
- Year on Year Comparison of Income
- Comparison of Income over current year Budget
- Income trends
- Income per Branch, Dept.

5.2.7 Risk and exception Analysis

- Real-time availability of data for auditors based on the provided template
- Identifying the duplicates
- Maker -Checker Analysis
- Bedford's Law
- Random Selection of GL postings
- Other Data Analytics required by Audit

5.2.8 Marketing and Member Recruitment Analysis

- Members Registration Trends
- Employer wise Target vs Recruitment of Members Analysis
- Active and Inactive members' information
- Recruiting Officer Performance

5.2.9 Debt Recovery Analysis

- Debt Collection Trends over a Time
- Product wise Debt Collection
- Credit Officer wise Debt Collection
- Branch Performance
- Allocation of Recovered Amount to Principle, Interest , Penalties and Other Charges

5.2.10 System Usage Analysis

- Analytics of Banking System Usage by Employee
- Measuring the System access time by Privilege , Module , Username and IP
- Information of captured By or Enter by for all SACCO transactions
- SACCO Banking System Audit Log Analysis

5.3 Compliance Definition:

The compliance column of the compliance summary statement shall contain one and only one of the following acceptable compliance statements

Compliance Statement	Meaning
Fully Compliant	The offered solution service is fully compliant with the requirement of the clause as written, without any interpretation or modification. Details should be given.
Partially Compliant	The offered solution doesn't fully comply with the requirement of the clause or is still under development. The answer must clearly separate and explain the compliant part and the non-compliant part. For the non-compliant part, an alternative solution may be proposed or if under development, then roadmap item reference and general availability timeline must be provided
Not Compliant	The offered equipment/solution/service does not comply with the requirements of the clause. The Vendors are asked to give details concerning this noncompliance and the details of a possible alternative solution

Any clause marked with “fully compliant” or “partly compliant” as per description of the partly compliant part in the vendor’s compliance summary statement is binding on the successful tender to supply equipment/software that meets the requirements of that clause. This applies for the lifetime of any awarded contract.

No.	Requirement	Compliance	Comments
Capability			
1	Ability to expose any database dimensions as interactive filters for dynamic querying		
2	Ability to search across entire application from a single search interface		
3	Ability to drill down/up/across data without a pre-defined drill-path- users can answer any question whether or not it was defined in advance		
4	Ability to do in-memory data analysis across all the data.		
5	Ability to combine multiple/ different graphs, charts, pivot/cross tables, and other visualization objects with custom drill downs		
6	Ability to conduct comparative analysis across different charts within the same dashboard page		
7	Ability to perform custom calculations		
8	Analytical features like ranking, filtering, sorting, group by, etc.		
9	Ability to connect to and visualize different data sources ranging from flat files, Excel and our databases.		
10	The tool should be recognized in the leaders quadrant by Gartner & BARC in their BI report at least for the last 5 years in a row		
11	Ability for selections to be applied automatically across multiple pages/tabs within the same user interface.		
12	Ability to memorize, organize, and revisit previous visualization/analysis scenarios, including filtering criteria and associated underlying data (e.g. bookmarks)		
13	Ability for different users to share and interact on common dashboards, and add comments/notes.		
14	Ability to use conditional formatting to set data alerts which highlight data exceptions.		
15	Ability to take a snapshot of data in time and interact through the dashboard(s) off-line.		
16	Ability to interact with data at the meta data level without having to comprehend the complexities of the underlying data or database, eliminating the need for coding and SQL.		
17	Flexible formatting and presentation layout options to allow for user friendly interfaces		
18	Support for mobile deployment with no additional coding required; including Android, iPhone, iPad		
19	Real-time collaboration capability; regardless of user type or location of access		

20	Real-time collaboration capability; regardless of user type or location of access		
21	User Management capability: tool shall leverage existing Sig Sign On mechanisms such as LDAP, Windows AD, ODBC users etc		
22	Application designers (power users) must be able to rapidly design and deploy complex data dashboards and analysis capability.		
23	Ability to provide a free-form User Interface. Out-of-the box users should be able to drop objects anywhere on the screen.		
24	Ability to create pixel-perfect static reports and schedule their distribution as an email or SMS within the platform.		
25	Ability to export reports in different formats (PDF, XLS, HTML etc.)		
26	Ability to create libraries of dimensions and measures allowing self-service within consistently managed parameters.		
Data Management, Security & Governance			
27	Ability to blend independent sets of data to different charts within a single dashboard page		
28	Ability to join data between data attributes automatically		
29	Should support multiple join types; INNER, OUTER, LEFT, RIGHT, etc.		
30	Ability to create access rights groups and provide access at different privilege levels		
31	Provide a single product that can support the ability to connect to data, provide ETL functionality and also the User Interface.		
32	Audit trail capability on specific activities and/or objects		
33	Data queries generated as result of user interaction with the applications must not affect existing performance of the transactional database it is pulling data from.		
34	Ability to schedule dependent tasks; that can be driven by a data event or manually.		
35	Solution should be implemented on premise without moving the data to any public or private cloud environment		
36	Solution should provide perpetual licenses for the organization to benefit from the solution without any mandatory periodic license fees		
37	Users should access all their dashboards and static reports from a single portal.		
Extensibility			
38	Open API to build custom extensions for integration into existing web-based applications		
39	Ability to add external/new charts to the tool?		
40	Ability to add third party extensions and capabilities which seamlessly extend the capability of the platform.		

6.0 COST OF OWNERSHIP (Financial Bid)

This section outlines the requirements for Bidder response for the Cost. Bidder must provide a detailed breakdown of the solution components based on the requirements in this RFP. Rates quoted should be inclusive of all taxes, must be in Kenya Shillings and should remain valid for at least 120 days after the tender opening.

The breakdown must cover all but not limited to the below

- 1- Software licenses
- 2- Implementation services
- 3- On-site Training
- 4- Support
- 5- Annual recurrent costs of licenses if applicable

If not captured in the table, kindly amend as necessary

NO	ITEM DESCRIPTION	QTY	UNIT PRICE KSHS	TOTAL PRICE KSHS	VAT (where Applicable)	TOTAL PRICE INCLUSIVE OF TAX
1	Implementation, professional and customization cost of the solution					
2	License Fees					
3	Training					
3	Annual Maintenance cost					
4	Any other Cost (Indicate other costs)					
	Total					

EVALUATION CRITERIA

1. Evaluation criteria shall be based on Mandatory, Financial, Technical proposals and System functionalities
2. Only bidders who pass the preliminary/ Mandatory stage shall proceed to the Technical evaluation
3. Only bidders who pass the Technical evaluation shall proceed to the financial evaluation
4. Before any award is made the successful bidder who has qualified upto financial evaluation shall be invited to come and make a presentation on the system functionalities given here below to confirm the award
5. The Evaluation Committee appointed by the client shall evaluate the proposals on their basis of their responsiveness to the above requirements.

1. MANDATORY REQUIREMENTS

- i. Manufacturer's authorization form.
- ii. Company certificate of incorporation / registration
- iii. PIN Certificate
- iv. VAT certificate
- v. Valid Tax Compliance Certificate (TCC)
- vi. Attach Ukulima Sacco payment receipt
- vii. Submit a bid bond / security of 2% of the Tendered sum in form of a Bankers cheque from a reputable bank or an insurance security from an insurance company approved by Public Procurement Regulatory Authority payable to Ukulima Sacco Society limited through Fosa branch Nairobi.
- viii. Profile of Directors, Telephone numbers, email and their postal addresses

2. TECHNICAL EVALUATION REQUIREMENTS - Accounts for (70 Marks)

	Evaluation Details	Points Awarded
1	Consultant / Company Profile indicating number of years in related business	10
2	At least three (3) successful similar assignments undertaken within the last three (3) years with at least three (3) references	15
3	Adequacy of the proposed work plan and Methodology in response to the Terms of Reference	10
4	Technical Approach methodology (detailed explanation of the methodology in terms the scope and the linkage to expected outputs)	20
5	Qualifications, competence and experience of Personnel assigned to the project	10
6	Relevant Certifications from Professional bodies	5
		70 points

NB: ONE MUST SCORE 60 MARKS AND ABOVE TO QUALIFY TO PROCEED FOR FINANCIAL EVALUATION.

3. FINANCIAL EVALUATION : Accounts for (30 Marks)

- Lowest Financial Quote : 30 marks
- 2nd lowest Financial Quote : 22.5 marks
- 3rd lowest Financial Quote : 15 marks
- Others : 7.5 marks

4. SYSTEM FUNCTIONALITIES REQUIREMENTS- (TO BE CONFIRMED DURING THE PRESENTATION)

Item	Description	YES	NO
1	Render both preconfigured and user-customized visual displays of data and trends into digital interactive dashboards		
2	Aggregate data from a data warehouse, local databases, Excel and flat files		
3	Provide an on premise or a cloud solution		
4	Be easy to administer from license point of view		
5	A single license should provide the full spectrum of tools required for implementing BI		
6	This single license should include the capabilities of ETL, data warehouse and reporting to an interactive dashboard		
7	License should provide the users the ability to convert the graphs and charts into reports in spread sheets & PDF		
8	Not require a pre-defined cube structure. As senior management and analysts request new reports across different aspects of the business, they must be able to quickly and easily collate the information without needing to go to ICT for support		
9	Users should experience zero wait time as the application performs the calculations needed to deliver the aggregations users request		
10	The application should integrate and standardize data from the disparate data sources into an easy-to-understand interactive visual display		
11	Is highly configurable and flexible to support numerous graphical representations that can be navigated by non-technical end users		
12	Dashboards should be available on all mobile devices without the need for additional development. The preference is for HTML 5 format, without the need to install specific software on mobile devices and should have the same analytics capabilities as the desktop version		