

REQUEST FOR EXPRESSION OF INTEREST (EOI)

EOI Description	IMPLEMENTATION, MAINTENANCE AND SUPPORT OF A POLICY ADMINISTRATION SYSTEM
EOI Number	EOI/LLK/PAS/05/2024
EOI Submission	Electronic Format - PDF
Deadline Submission for	21st June 2024



1 GENERAL INFORMATION AND INTRODUCTION

Procuring Entity Registered Address

Liberty Life Assurance Kenya Limited

Liberty House, Processional Way

P.O Box 30364 – 00100 Nairobi, Kenya

Tel: +254 20 2866 000

w: www.liberty.co.ke

For purposes of this document, the abbreviation LLK shall refer to Liberty Life Assurance Kenya Ltd.

Liberty Life Assurance Kenya Ltd is a life insurance provider that offers offer a range of attractive investment, retirement, life and education solutions to individuals and businesses.

Our purpose is to make a difference in people’s lives by making financial freedom possible. We change realities and facilitate financial freedom by providing innovative and relevant solutions that help our customers protect their greatest assets.

With a proud heritage of over half a century, we have been a pioneer in knowledge sharing and making a significant contribution to the financial services industry and socio-economic needs of the country. We will continue striving to change realities in Kenya. Liberty is not just our name; it’s what we do.



2 INSTRUCTIONS TO BIDDERS

PLEASE READ ALL INSTRUCTIONS CAREFULLY BEFORE PREPARING AND SUBMITTING YOUR PROPOSAL.

1. Liberty Life Assurance Kenya Ltd (LLK) intends to enter into an agreement for IMPLEMENTATION, MAINTENANCE AND SUPPORT OF A POLICY ADMINISTRATION SYSTEM. LLK wishes to initiate a process for shortlisting of vendors whom upon qualifying will participate in the request for proposal (RFP) phase. LLK hereby invites potential suppliers to submit their Expression of Interest (EOI) for the services.
2. All expressions shall be prepared and submitted in accordance with the requirements outlined here-in. Failure to comply with any requirement shall cause the proposal to be considered unresponsive and may be grounds for rejection.
3. By accepting to participate in this request for solicitation, you agree NOT to share the request with any other party thus enabling them to participate. The Company reserves the rights to invite prospective bidders.
4. All proposals should be submitted in PDF format through email to Liberty Procurement groupprocurement@libertylife.co.ke as per the dates provided.
5. Expression submission deadline is 4 pm, (GMT +3), **21st June 2024**.
6. Submitted expressions shall bear the official company stamp on all signed sections of the proposal.
7. All requests for clarification must be sent in writing to groupprocurement@libertylife.co.ke before the 4PM, (GMT +3), **14th June 2024**.
8. The Company reserves the right to accept or to reject any expression.
9. The Bidder shall bear all costs associated with the preparation and submission of its expressions and LLK will in no case be responsible or liable for those costs, regardless of the conduct or outcome of the bidding process.
10. Expressions received will be evaluated and the outcome will form the basis for invitation for request for proposal.
11. Conclusion of process - Applicants will be notified of the LLK's decision via email as soon as the process of evaluation is completed.
12. Timetable alteration - Whereas the Company will endeavour to abide by the timelines stated above, it reserves the right to alter this timetable. Any such amendments shall be communicated to bidders.



13. Proposal Integrity - Wilful misrepresentation of any fact within the bid will lead to the cancellation of the proposal submitted without prejudice to other actions that the company may take. All the submissions, including any accompanying documents, will become property of the company.

3. OBJECTIVES

The Solution Provider will be responsible for providing the software solution to LLK and to assist in implementation and support maintenance. This Request for EOIs provides only general information on the Project and further details and the specific requirements for the information system will be contained in a Request for Proposals which will be issued to companies who are pre-qualified through this EOI process.

The fully fledged Integrated Policy Administration Management System is expected to cover the following, amongst other key functions: –

- Retail Life, Group Risk and Pensions Administration (capable of administering a hybrid of Defined Benefit and Defined Contribution schemes)
- Financial Management
- Electronic documents management
- Biometric membership data management capability

4. SCOPE OF WORK

The proposed system should have capability to administer LLK's main lines of business namely:

- Retail Life
- Group Risk
- Pension

Other high-level requirements are as follows:

- Review of the User requirements specifications and supply of a responsive Integrated Policy Administration and Financial Management System
- Preparation of system implementation progress reports
- Implementation of the policy administration system
- Data migration framework and implementation
- Integration with existing systems
- Data security and privacy management capability
- Preparation of system documentation and user manuals
- Staff profile – qualification & experience
- Project management
- Technical and end-user training
- Post-implementation support and maintenance



- Proof of accreditation by software owner, joint venture /MOU with OEM or proprietary ownership
- Hardware, software & OS and data base management requirements

The minimum criteria for pre-qualification (short-listing) of the consulting firms shall include, but not limited to the following:

- The vendor must be a legally registered entity.
- Vendor must demonstrate the relevant experience, competencies, skills, and qualifications for the supply and implementation and support of the required system.
- The vendor should have successfully implemented a similar system in at least three insurance companies preferably in long term business.
- Demonstration of financial soundness (submit certified 3-year audited financials).
- The firm must be compliant with the relevant tax laws (refer to section 7 below).

5. SIGNATURE PAGE

The following is a form to be completed by the vendor:

Authorised Signature	
Name of Authorised Signatory	
Designation (Title)	
Company Name	
Company Address	
Phone Number (s)	
Email Address(es)	
Date	



The above individual is authorized to sign on behalf of company submitting proposal.

Proposals must be signed by an official authorized to bind the provider to its provisions for at least a period of 90 days.

6. DECLARATION OF INTEREST

All **Vendors** are required to declare any interest that they or their employees may have in The Company's operations businesses in Kenya, or any employee of Liberty Group may have with the **Vendor**. To that effect the following must be duly stated by the authorised signatory:

- 1. Are you or any person associated with your proposal, employees of the Company's principal operating businesses in Kenya? **Yes No**

If so, state particulars

- 2. Have you, or any person associated with your proposal, any relationship (family) with any person employed by the company's principal operating businesses in Kenya who may be involved with the evaluation and adjudication of this REQUEST. **Yes No**

If so, state particulars

- 3. Are you, or any person associated with your Proposal, aware of any relationship (family, friend, other) between the **Vendor** and any person employed by the company's principal operating businesses in Kenya who may be involved with the evaluation and adjudication of Proposals submitted in response to this REQUEST? **Yes No**

If so, state particulars

Name of **Vendor** _____

.....

(Signature of Declarant)

.....

(Date)

..... (Position of Declarant)



7. PRELIMINARY MANADATORY REQUIREMENTS

The following are mandatory requirements that must be submitted together with the expression of Interest.

i	Certificate of Incorporation/Registration
ii	Valid Tax Compliance Certificate - current
iii	Valid PIN certificate
iv	An official confirmation by the registrar of companies as to whom the directors/shareholders of a company are (Certified copy).
v	Certified copies of audited financial statements extracts for the last three years (2020 to 2023)
vi	Disclosure of any court proceedings against the bidder likely to affect ability to execute the engagement
vii	Company profile – detail management structure among other things
viii	Duly completed RFI form
ix	Proof of compliance with data privacy laws

KEY EVENTS AND PROCESSES	DATE
Release of Expression of Interest	24 th May 2024
Deadline for clarifications by email to Liberty Procurement at groupprocurement@libertylife.co.ke	By 4 PM (GMT +3), 14 th June 2024
Proposal submission due date	By 4 PM, (GMT +3), 21 st June 2024
Notification of outcome	By 28 th June 2024