



## **REQUEST FOR PROPOSAL (RFP)**

**FOR**

**AN ENTERPRISE RESOURCE PLANNING (ERP) SYSTEM**

**AND IMPLEMENTATION SERVICES**

**FOR**

**AGRICULTURAL SOCIETY OF KENYA**

RFP#	RFP/1/2017/ERP/ASK
Date of Release	JUNE 16 <sup>TH</sup> 2017
Deadline Pre-Proposal Enquiries	JUNE 30 <sup>TH</sup> 2017
Due Date	21 <sup>ST</sup> JULY 2017



**REQUEST FOR PROPOSALS FOR ERP SOLUTION AND IMPLEMENTATION SERVICES**  
Agricultural Society of Kenya

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Date: JUNE 2017

Bid Number: RFP/1/2017/ERP/ASK

Bid title: REQUEST FOR PROPOSAL FOR THE  
AGRICULTURAL SOCIETY OF KENYA

Bids will be received until: 21<sup>ST</sup> JULY 2017

For additional information please contact: ICT DEPARTMENT

Telephone: 020 8070808/9

Email Address: ict@ask.co.ke

Website for Bid Information: www.ask.co.ke

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VENDORS PLEASE READ AND WRITE OR TYPE YOUR DETAILS BELOW

The undersigned hereby affirms that (1) he/she is a duly authorized agent of the vendor, (2) he/she has read all terms and conditions and technical specifications which were made available in conjunction with this Request for Proposals and fully understands and accepts them unless specific variations have been expressly listed in his/her offer, (3) the offer is being submitted on behalf of the vendor in accordance with any terms and conditions set forth in this document, and (4) the vendor will accept any awards made to it as a result of the offer submitted herein.

Name of Company: \_\_\_\_\_

Address: \_\_\_\_\_

Contact Person: \_\_\_\_\_ Title: \_\_\_\_\_

Phone: \_\_\_\_\_

Email Address: \_\_\_\_\_ Date: \_\_\_\_\_

Authorized Representative's Signature \_\_\_\_\_ Stamp \_\_\_\_\_



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## Section A: RFP Introduction

### A.1 Purpose of the RFP

The Agricultural Society of Kenya is asking for a proposal the purchase of an Enterprise Resource Planning (ERP) Solution. The Society requires that any proposal for an ERP also include professional services necessary to implement the system. The Society will consider all deployment options, including SaaS, Hosted Solutions, or On-Premise solutions.

The scope for this project includes Financials and payroll modules, Human Resources, Customer relations, Business Development and Marketing, Branch operations, Asset Management (Fleet management and Utility Maintenance, Audit, System Administration, Supply chain Management, Document Management, Project Management and Business Intelligence. The project will serve the entire Society which has 17 branches nationally.) The Society currently uses a number of legacy systems and expects to integrate these in the proposed ERP system for use beginning January 2018. Vendors interested in proposing should therefore propose a schedule that implements the system efficiently.

### A.2 about the Agricultural Society of Kenya

The Agricultural Society of Kenya (A.S.K) was founded in December 1901 under the name East African Agricultural and Horticultural Society (EAA & HS). The central objective was to promote agricultural development based on European Settlement. This was the brainchild of John Ainsworth, who was the Sub-Commissioner for Ukambani Province. He believed that the organisation was to be an invaluable institution in the struggle to establish and maintain an agricultural export commodity economy. The shows were to be a very important shop window for prospective buyers both local and International. Nairobi became the Society's Headquarters with the first show held at the Jeevanjee gardens and market in 1902.

The Society consists of 17 branches, which are spread out in 17 counties in Kenya. The headquarters is located at the Jamhuri grounds in Nairobi.

### A.3 Project Background

The Society's mandate is to promote excellence in Agriculture trade and allied sectors. This is achieved mainly through four strategic objectives – Exhibitions, Outreach, Membership and Institutional capacity.

Currently the Society uses legacy systems that are custom developed to manage payroll, membership, Special Party, Text Messaging and part of operations of exhibitions (ticketing). The rest of operations largely remain manual.

The Society is interested in implementing best practice processes for all its functions.



#### A.4 Notice to Vendors

Failure to carefully read and understand this RFP may cause the proposal to be out of Scope or Compliance and may lead to rejection by the Society, or necessitate the Vendor to provide more than they may realize. Information obtained by the Vendor from any officer, stakeholder or employee of the Society shall not affect the risks or obligations assumed by the Vendor or relieve the Vendor from fulfilling any of the RFP conditions or any subsequent contract conditions. Only the format described in the RFP and the attachments included with this RFP will be accepted as compliant for the submitted proposal. Failure to completely fill out all required attachments may result in disqualification.

#### A.5 Conditions

- A.5.1** Vendors shall make all inquiries necessary to thoroughly inform themselves regarding this proposal. No plea of ignorance by the Vendor of conditions that exist or that may hereafter exist as a result of failure to fulfill the requirements of the contract documents will be accepted as the basis for varying the requirements of the Society or the compensation to the Vendor.
- A.5.2** In the event that all RFP requirements are not met with products and services provided by one firm, Vendors are encouraged to partner with another firm to submit a joint proposal and inform the Society in writing of this venture. The Society shall evaluate each proposal to determine its overall fit in the best interests of the Society.
- A.5.3** In the event that multiple firms partner to submit a joint proposal, the proposal must identify one firm as the primary contact. This primary contact will be the primary point of contact throughout the procurement process. A primary firm must also be identified for implementation. The primary firm will be held responsible for the overall implementation of all partners included in the joint proposal.
- A.5.4** All third-party solutions proposed as part of a joint proposal are subject to the same requirements of this RFP, unless otherwise stated.
- A.5.5** Implementation pricing must be submitted on a deliverable and “phase” basis. For implementation services under a phase arrangement, the Society may compensate the vendor a fixed amount for the completion of major phases. Vendors are to provide all work effort and assumptions used to calculate the fixed fee for each deliverable and phase. The scope of the project will be defined by the statement of work and detailed functional requirements included as Attachment 8 (Functional Requirements). All firms submitting proposals are encouraged to submit the most competitive proposal possible as the failure to do so may lead to disqualification prior to software demonstrations.
- A.5.6** This RFP, its general provisions, and the terms and conditions identified in Section F: Contract Terms and Conditions shall be incorporated in any agreement resulting from



this solicitation, and the RFP and its terms and conditions, plus attachments shall control unless the Agreement expressly provides otherwise.

- A.5.7 All proposals and any subsequent clarification or response to the Society's questions shall be valid for a minimum of 180 days.
- A.5.8 Vendors are advised that all Society contracts are subject to all applicable requirements contained in the Society's Purchasing protocols.
- A.5.9 Vendors are required to state exactly what they intend to furnish to the Society via this RFP and must indicate any variances to the terms, conditions, and specifications of this Solicitation no matter how slight. If variations are not stated in the Vendor's offer, it shall be construed that the Vendor's offer fully complies with all conditions identified in this RFP.

#### **A.6 Rights of the Society in the RFP**

- A.6.1 The Society reserves the right to select the proposal(s) which in its sole judgment best meets the needs of the organization. The lowest proposed cost will not necessarily be the criterion for recommending the contract award.
- A.6.2 The Society reserves the right to award multiple contracts from this RFP.
- A.6.3 The Society reserves the right to reject any or all proposals and to waive technicalities and informalities when such waiver is determined to be in the Society's best interest.
- A.6.4 The Society may modify this RFP by issuance of one or more written addenda. Addenda will be informed to the Vendor in writing or may be posted on the Society's Website (See Section A.8 Inquiries and Requests for Clarification)
- A.6.5 The Society reserves the right to meet with select Vendors at any time to gather additional information. Furthermore, the Society reserves the right to remove or add functionality (i.e., modules, components, and/or services) until the final contract signing.
- A.6.6 This RFP does not commit the Society to award a contract. All proposals submitted in response to this RFP become the property of the Society.
- A.6.7 The Society shall not be liable for any pre-contractual expenses incurred by prospective vendors, including but not limited to costs incurred in the preparation or submission of proposals. The Society shall be held harmless and free from any and all liability, claims, or expenses whatsoever incurred by, or on behalf of, any person or organization responding to this RFP.
- A.6.8 The Society shall not be under any requirement to complete the evaluation for this RFP by any specific date and reserves the right to suspend or postpone the evaluation



process should the need arise due to budget constraints, time constraints or other factors as directed by the Society.

### **A.7 Communication Regarding this RFP**

All communication from prospective Vendors regarding this RFP must be in writing by email to the address listed in Section A.8 Inquiries and Requests for Clarification.

Attempts by or on behalf of a prospective or existing vendor to contact or to influence any member of the Tender/RFP committee, any member of the Board or any employee of the Society with regard to the to this RFP may lead to elimination of that vendor from further consideration.

### **A.8 Inquiries and Requests for Clarification**

- A.8.1** In an effort to maintain fairness in the process, inquiries concerning this procurement, including questions related to technical issues are to be directed through email to the following contact.

*Title Contact:* ICT Department

*Email:* [ict@ask.co.ke](mailto:ict@ask.co.ke)

*Website:* [www.ask.co.ke](http://www.ask.co.ke)

- A.8.2** All questions concerning the RFP or functional requirements document must reference the page number, and section heading.
- A.8.3** Inquiries or requests for clarification submitted prior to the deadline listed in Section A.10 (Procurement Schedule) will be addressed at the pre-proposal vendor meeting. Additional inquires or requests for clarification will be accepted until the deadline listed under Section A.10 (Procurement Schedule).
- A.8.4** Proposals may be changed or withdrawn prior to the deadline for proposals. All such changes and withdrawals must be submitted in writing and received by the Society prior to the deadline for proposals. After the deadline for proposals, no change in prices or other provisions prejudicial to the interest of the Society or fair competition shall be permitted.





## A.9 Pre-Proposal Enquiries

Pre-proposal enquiries by vendors should be made within the date described in Section [A.10](#) by email or through a meeting where necessary. Pre-proposal enquiries or meetings are not mandatory. Vendors intending to participate in the pre-proposal conference should confirm attendance via email.

## A.10 Procurement Schedule

The expected procurement schedule is listed below. The Society reserves the right to change the procurement schedule. If changes are made, Vendors will be notified by the Society in the form of an addendum to this RFP and emailed directly to all registered Vendors.

Task	Date	Description
1	16 <sup>th</sup> June 2017	Release RFP
2	30 <sup>th</sup> June 2017	Deadline for pre-proposal enquiries
5	21 <sup>st</sup> July 2017	Proposals due – 5:00 PM
6	18 <sup>th</sup> August 2017	Up to three Vendors elevated and notified for software demonstrations
7	24 <sup>th</sup> August 2017	Software demonstrations and Implementation Presentations
8	7 <sup>th</sup> September 2017	Elevate and notify semifinalist or finalist Vendor(s)
9	14 <sup>th</sup> August 2017	Complete contract negotiations and Statement of Work (SOW)
10	21 <sup>th</sup> September 2017	Award of contract by the Society
11	3 <sup>rd</sup> November 2017	Implementation Begins

**A.10.1** Software demonstrations and implementation presentations will be held on-site at the Society's at Jamhuri Park and will cover all functional areas listed in this RFP. It is preferred that key implementation team members that will be assigned to the project be present at the demonstration and lead the presentation about any implementation topics. To avoid unnecessary delays, the Society expects that Vendors will be available for software demonstrations and on-site Discovery sessions within the timeframes identified on the procurement schedule (Section [A.10](#)). Vendors that cannot demonstrate their software during these timeframes may be eliminated. The agenda and software demonstration scripts will be distributed to Vendors that have been short-listed for software demonstrations in advance of the demonstrations/interviews.

The Society reserves the right to change the dates of presentations or demonstrations as needed.



### A.11 Evaluation Criteria

The Society will review all proposals received as part of a documented evaluation process. For each decision point in the process, the Society will evaluate Vendors according to specific criteria and will then elevate a certain number of Vendors to compete in the next level. Vendors not previously elevated may be elevated at a later date if the previously elevated vendors lead to an unsuccessful outcome.

The criteria that will be used to evaluate proposals may include, but are not limited to the following:

- Submittal Compliance
- Overall Understanding of the Society's Needs
- Cost
- Functionality
- Response to All Schedules in RFP
- Implementation Methodology/Approach
- Software Demonstrations/Implementation Interviews
- Software and Implementation References

The Society reserves the right to determine the suitability of proposals on the basis of any or all of these criteria or other criteria not included in the above list.

### A.12 Evaluation Process Summary

The Society will follow the evaluation steps summarized below:

#### A.12.1 Evaluation Steps:

- Proposal Opening: Proposal submittals shall be received and publicly opened. Only the names of Respondents will be read at this time.
- Compliance: A preliminary evaluation by the Society shall determine whether each received proposal is complete and compliant with the all instructions and/or submittal requirements in the RFP. Any proposals that are incomplete or that do not comply with the instructions and/or submittal terms and conditions may be rejected and excluded from further consideration. Vendor proposals, which are compliant, are advanced to the written evaluation stage.
- Written Evaluation. The Society will evaluate Vendor's written proposals according to the criteria outlined in Section A.11 (Evaluation Criteria). The highest ranked Vendor proposals will advance to the Software Demonstration/Interview Stage.
- Software Demonstrations/Interviews. Vendors that are advanced to this stage will be required to provide on-site software demonstrations to Society Evaluators. The Society



may also interview key Vendor staff to be assigned to the project. The demonstrations and interviews will be conducted in accordance to Section A.10.1. Vendor demonstrations and interviews will be evaluated by the Society. Highest ranked Vendor proposals will advance to the Discovery stage. Only products that have been proposed may be demonstrated.

- Discovery. Vendors advanced to this stage will be asked to make a second on-site presentation to discuss the details of the implementation strategy.
- Information verification. The society will conduct site surveys of and reference checks for finalist vendors as well as verify all other information provided. Any vendor who fails this step will be eliminated and the society may choose to elevate other vendors to this stage.
- Negotiations. Upon satisfactory completion of the above process, the Society will select a finalist vendor to complete software and implementation negotiations. If third-party software is involved, the Society may elect to negotiate with these vendors first. The primary vendor will be expected to assist with negotiations. The final contract award recommendation will be made to board of the Society.
- Contract Award. The Chief Executive Officer (CEO) of the Society authorizes all Society contracts. The contract for this RFP will be awarded upon signing by the CEO.

### A.13 Proposal Submission Instructions

**A.13.1** Proposals are to be submitted in sealed envelopes marked **RFP/1/2017/ERP/ASK** by **July 21<sup>th</sup> 2017 at 4:00 PM**. Late submissions will not be accepted.

***Submittal Address:***

Attention: Chief Executive Officer  
Agricultural Society of Kenya  
P.O. BOX 30176-00100  
Nairobi

**A.13.2** Proposals received subsequent to the time and date specified above will not be considered.

**A.13.3** Signature of the proposal by the Vendor constitutes acceptance by the Vendor of terms, conditions, and requirements set forth herein.

**A.13.4** Vendors are required to submit a financial and a technical proposal in hard copy in sealed envelopes that is clearly labeled with the Vendor's company name, RFP Number and contact information as well as soft copies of the same in suitable storage media. Hard copies of the technical proposal must include a letter signed



by an authorized agents, dealers or third party partners of involved in the proposal. The letter should include appropriate contact information for each firm.

**A.13.5** Emailed and faxed proposals will not be accepted.

**A.13.6** Use Attachment 1 (RFP Submittal Checklist) to ensure that all required documents, forms, and attachments have been completed and submitted as instructed.

By submitting a proposal, the Vendor is providing a guarantee to the Society that, if chosen, it will be able to provide the proposed products and services. Upon submission, all proposals shall be treated as confidential documents until the selection process is completed.

#### **A.14 Organization of Proposal**

The proposal must be organized into major sections defined in Section B. Specific instructions for each section are provided in Section B of this RFP. Any required attachments must be included in the proper section as indicated by the instructions.



## Section B: Detailed Submittal Requirements

So that proposals can be compared fairly, Vendors must assemble their proposals in strict adherence to the submittal requirements identified in this section and following the formats required by Section A.14. Failure to follow all proposal organizational requirements may result in disqualification. Proposals should be prepared as simply as possible and provide a straightforward, concise description of the proposed products and services to satisfy the requirements of the RFP. Attention should be given to accuracy, completeness, relevance, and clarity of content. Proposals must address the sections and be presented in the same order.

### B.1 Executive Summary and Introductory Materials

The introductory material should include a title page with the RFP name, name of the Vendor, address, telephone number, the date and a Table of Contents. The executive summary should be limited to a brief narrative (less than 3 pages) summarizing the proposal. The following should be included

- Vendor statement
- Brief Company Background

### B.2 Scope of Work

This section of the proposal should include a general discussion of the Vendor's overall understanding of the project and the scope of work proposed including the following:

- How the vendor shall identify the critical activities required for implementing the proposed system in line with the Society's corporate Strategy
- How the vendor shall study the Society's business processes and prepare the appropriate system design required to enable the planning process
- Measures the vendor shall employ to recommend the necessary hardware and infrastructure relevant to the system.
- How the vendor shall implement data migration from existing system or manual operations.
- How the vendor shall undertake all types of system testing, customization and operationalization of the proposed system as per the user requirements.
- How the Vendor intends to conduct user training and format of user training materials.
- Details of system maintenance, upgrades and patches.
- The vendors shall also be required to provide a statement about whether the primary Vendor's contract will/will not encompass the third-party product/service (if proposed) and/or whether the Society will have to contract on its own for the product/service (if proposed).



### **B.3: Other Information required from Vendors**

The vendor will be expected to list and describe all proposed software products that will be delivered as part of the project. If the software is sold by module, the Vendor must explicitly state the software module name and versions that are being proposed. In addition the following information should be adequately addressed:

- Shortest possible delivery period of each product
- Itemized Costs for each product and for the overall project in Kenya shilling currency – should be specified in the financial proposal
- Any Provisions for Escrow Arrangements
- Provisions for Licenses and costs of licenses should be detailed in the financial proposal

### **B.4 Exceptions to the RFP**

Vendors may take exception to certain requirements in this RFP. All exceptions shall be clearly identified in this section, with a written explanation of the exception and an alternate proposal (if applicable) attached. The Society, at its sole discretion, may reject any exceptions or specifications within the proposal.

### **B.5 Sample Documents**

Vendors should include samples of the following documents with their proposals

- Sample software license agreements.
- Sample Project Plan
- Sample of or excerpt from a business process assessment / system design document.

### **B.6 Financial Proposal**

Vendors should submit their price proposal alongside the following requirements in the Financial Proposal Document

Cost of each major phase as part of the project. It is required that costs will be invoiced upon completion of major phases. Please provide a schedule of all payments necessary to complete the proposed scope of works. Please note: the Society will be assessing a 20% retainage fee for each milestone payment. The retainage will be released upon Final Acceptance of the system.

- It is important that Vendors include total price for all software, services, and additional costs to acquire all software and services referenced in the financial proposal including third party prices.



- **All pricing must be submitted as fixed by phase. Costs listed as “to-be-determined” or “estimated” will not be scored.**
- All service related costs must be provided on a task or completion basis with costs assigned to each phase, deliverable and/or task. Vendors are required to fill in deliverables and tasks under the provided headers (project initial knowledge transfer, process analysis/system design, system build, testing, training, and closure) Additional detail may be provided to further explain deliverable/task costs.
- Vendors should include all software modules and state any limitations on module use. If no limitations are listed, the Society will consider that pricing is based on full enterprise access for the Society.
- **Vendors must submit implementation costs as fully loaded rates that include all necessary travel or other expenses.** By submitting a proposal, all Vendors acknowledge that all pricing (including travel) must be a fixed fee or clearly justified in the implementation phases.



## Section C: Implementation Plan

This section should describe the proposed implementation plan.

**C.1** Provide a detailed plan for implementing the proposed system. This information must include:

- Proposed phasing for roll-out of proposed system
- Explanation of advantages AND risks associated with this plan
- Description of implementation tasks and activities
- Description of key deliverables (and how they relate to the implementation approach and activities).

**C.2** Explain the proposed vendor staffing for the project including:

- How many staff will the vendor have assigned to the project
- Approximate dedication to the project of each resource and approximate time work will be completed on-site vs. off-site
- Major roles and responsibilities for each resource

**C.3** Explain proposed project management services including:

- Role of the vendor project manager
- Expected role of the Society project manager
- Proposed integration oversight methodology

**C.4** Explain the expected Society's staffing for the project including:

- Assumed participation in the project (average portion of FTE). This should include all time spent working on the project (including time spent with and without vendor consultants)
- Assumptions about prior skills / competencies of resources

**C.5** Provide an overview of proposed training plan/strategy, specifying how and when training is to be delivered for both on-site and off-site training and web training services for the core project team, end users, and technology personnel (if required).

- Explain any roles and responsibilities the Society is expected to provide for the training effort including (but not limited to) training coordination, training material development, training delivery, etc.

**C.6** Provide an overview of transition activities from implementation into post implementation.

- The Society desires the Vendor to train Society project team member how to troubleshoot issues.
- The Society requires the Vendor to provide on-site support for live to Period End Closing





## Section D: Project Scope – Implementation Services

The Society is aware of the level of effort required for an ERP implementation. The Society also understands the importance of a disciplined implementation that includes services for project management, system design and documentation, testing, and training.

The following requirements are expected to be used throughout the engagement:

### D.1 Project Management Methodology

The Society expects the Vendor to follow an industry standard implementation methodology. The Vendor must implement strong project management methodology practices that will enable the Vendor to conform to the proposed project delivery schedule.

### D.2 Reengineer Business Processes

The Vendor must make a sincere effort to propose business practice changes that can be brought to the Society through the new software solution as well as practice improvements based on the functional requirements that may be associated with processes surrounding the use of the new software. The Vendor should provide recommendations on associated implications and recommendations to deal with the implications.

### D.3 Leverage Standard Functionality

The Vendor must maximize the software's standard delivered functionality and look to finding creative ways to configure gaps between the Society's requirements and the standard software instead of proposing customizations, unless absolutely warranted and cost-value justified. Any proposed customizations must be clearly identified and justified by the Vendor and submitted to Society's ICT project team for consideration. No customizations to any software are to be made by the Vendor without written approval by the Society's ICT Team.

### D.4 Knowledge Transfer

For project work that involves the Society's staff for knowledge sharing or transfer, the Vendor will conduct this project work on-site and will work closely with staff and assigned project personnel to ensure day-to-day project knowledge transfer on all functional, technical and change management aspects of the project as appropriate for the nature of the software and managed services solution under the Project Scope of Work.

### D.5 Software Installation

The Vendor, working closely with the Society's ICT team, shall install all proposed software, and third-party software per relevant vendor installation requirements. The Vendor shall document all installation procedures, test results and operating procedures to maintain and update with fixes, patches and upgrades. Following the installation, the Vendor technical



team shall continue to own, monitor and tune the environments, throughout the duration of the implementation, until the proposed and implemented solution is accepted at the end of the post-production period.

#### D.6 Implementation Deliverables

To ensure quality throughout the implementation, the project will include, at a minimum, the following deliverables. The Society recognizes that each Vendor may have their own implementation methodology to implement ERP; but it is the responsibility of the Vendor to map their implementation methodology with the specified project's requirements and tailor the proposed methodology to comply with the task, activity and deliverable requirements as described under this section. Each deliverable will be the responsibility of the vendor and will be formally presented to the Society for review and sign off. The Society expects each phase to contain each deliverable (unless noted)

- 1) **Comprehensive Project Plan** – Detailed listing of tasks for the entire project that includes the following for each task: due date, responsibility, predecessors. Tasks to include on the project plan will include all implementation activity, deadlines, phases, sign offs, review periods, and deliverables.
- 2) **Technical Infrastructure Design and Implementation Plan** – Design for each of the production and non-production environments proposed by the Vendor, containing at a minimum detailed information on (a) methodology, tools, procedures, activities, and services for infrastructure installation, configuration and change (b) recommendations/determination of any physical upgrades to Society's current systems (c) hardware specifications, sizing and capacity planning (c) software bill of materials including system software, application software, middleware and databases (d) security infrastructure (e) network and connectivity (f) performance characteristics (g) availability, flexibility, and growth requirements.
- 3) **System Design Document** – Work product that identifies both the business process decisions as well as system configuration decisions for each in scope business process and system feature.
- 4) **Testing Scripts** – Test scripts based on the functional requirements and system design document that require successfully completion of each item in scope (functional requirements) and the set-up of the system (system configuration).



- 5) **Training Documentation** – Complete system manual for how to use the configured system
- 6) **Cutover Plan** – Complete list of activities required for Go-Live.



## Section E: Project Schedule

The Society expects vendors to recommend the best practice roll-out strategy for the proposed solution. When recommending the rollout strategy and schedule, Vendors should describe the reasons for their recommendations and clearly identify any implementation assumptions.

### E.1 Project Staffing

The Society will make every effort to staff the project appropriately and understands that staffing a project is important to its success. The following table lists resources that the Society expects to be available for the project, their applicable areas of knowledge/assumed roles in the project, and the maximum participation levels in the project.

<b>Society Staff Participation</b>
<b>Assumed Role</b>
Project Manager
Finance and Payroll Lead
Procurement Lead
Branch Team
HR Lead
Technology Lead

### E.2 Statement of Work

The Society will require the development of a detailed statement of work, including a high-level project plan, prior to contract signing. The statement of work will include and describe at least the following and may include additional items the Society deems necessary:

- Project scope
- Project milestones or Phases
- Project deliverables
- High level project schedule (listing of phases and go-live dates)
- Project resources
- Project roles and responsibilities
- Project change control procedures



### E.3 Number of Users

The Society envisions that majority of its staff will use the system. Vendors should plan however on having all Society departments with access to the system for users to enter transactions. The following user counts identify expected users within each functional area. Additional users may be required for extra help and Vendors should plan to provide sufficient system access for the Society to fully implement their desired business processes. Proposals should include services to complete implementation and any appropriate training services to prepare all Society staff for using the system. (Note: Employees are counted in multiple columns). **It should also be noted that preference will be given to vendors whose licenses allow for a flexible number of users (concurrent) i.e. where the number of licenses required are less than the number of users.**

Society Users		
Type of User	Estimated Number of Users	Estimated Number of Power Users
Finance/Payroll	25	2
HR	2	1
Procurement	20	3
Branch team/Exhibitions/Trade	13	13
Audit	2	1
Legal	1	1
CRM	7	1
Facilities Management	4	1
ICT/Systems Admin	3	1
Document Management	3	2
Management Reporting	6	1

### E.4 Current Applications

The following applications are used by the organization for major business functions. Information about their replacement or interface is provided for the Vendor's convenience. The Society intends to discuss the future use of these applications during software demonstrations and contract negotiations.



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<b>Current Applications</b>			
<b>Functionality</b>	<b>Application</b>	<b>Primary Owner/(s)</b>	<b>In Scope for Replacement</b>
Finance	Manual	Finance Dept.	Yes
Payroll	Wingu Box	Finance Department	Yes/Data to be integrated
Ticketing	Custom made	ICT Dept.	To be integrated
Recruitment	Manual	Human Resource Dept.	Yes
Membership	Custom made	ICT Dept	To be integrated
Utility Billing	Manual	Branches	Yes
Special Party System	Custom Made	ICT Department	To be integrated
Document Management	Manual	Branch and HQ	Yes
Text Messaging	Custom Made	ICT/Marketing	Yes
Web maintenance	CPanel	ICT Department	No
Marketing/CRM	Manual	Marketing	Yes
Audit	Manual	Audit	Yes
Facilities Management	Manual	Branches/HQ	Yes
Procurement	Manual	Finance	Yes
Exhibitions and Trade	Manual	Manual	Yes
Legal	Manual	HQ	Yes



## Section F: Contract Terms and Conditions

Below are important contract terms and conditions that the Society expects to be part of an agreement with the finalist Vendor(s). Please indicate your willingness to comply with each condition by noting any exceptions per the instructions in section B.5 of this RFP. Contract terms in the final agreement should include but will not be limited to those listed below. The Society will carefully evaluate any exceptions to the terms and conditions listed below.

### F.1 Key Personnel

The Society requires assurances as to the consistency and quality of vendor staffing for its project. Key points of the Society's key personnel provision include:

**F.1.1** The Society shall have the rights to approve key personnel proposed by the vendor.

**F.1.2** The Society shall have the right to dismiss key personnel from the project.

**F.1.3** Vendor key personnel may not be removed from the project without notification to the Society.

### F.2 Implied and Express Warranty

The Vendor will expressly warrant that the proposed and implemented system will conform in all material respects to the in scope requirements and specifications as stated in this RFP including the functional requirements in [Attachment 8 \(Functional Requirements\)](#) for a period no less than 12 months after final acceptance. The rights and remedies provided herein are in addition to and do not limit any rights afforded to the Society by any other clause of this proposal.

### F.3 Express Warranty Remedy

The Society requires that the vendor commit to repair or replace any function not working in the system during the life of the warranty. In the event a problem cannot be fixed or replaced, the vendor will refund the full amount paid for the software, implementation and any paid hosting and/or maintenance costs.

### F.4 System Acceptance

For purposes of acceptance of the system (or portions thereof), the Society intends to use a two-staged acceptance procedure for each phase and for the entire project. Key points include:

**F.4.1** "Conditional Acceptance" will occur at or prior to go-live. The Society will have up to forty-five (45) days to test the system ("pre-live testing") before going live.



- F.4.2** The Society will have a 90-day period after Conditional Acceptance to “live test” the system. Live testing is the Society’s opportunity to verify that the system complies with the functional requirements and any other written specifications delivered to the Society by the vendor during the course of the project.
- F.4.3** If after the live testing the system performs in accordance with the system specifications (including the design document and functional requirements), the Society will issue “Final Acceptance.” The 90-day time frame for Final Acceptance shall be extended if problems are found in the live test. Specifically, the Society expects to document the date the problem is found and the date it is certified as fixed. The acceptance period would pause when issues are reported and would restart on the date the problem is certified as fixed. The warranty period shall begin at the time of Final Acceptance.

### **F.5 Phases or Milestones**

The Society requires that all payments be based on successful completion of phases (see 3.0 on Attachment 8 Annexed). After the Society acceptance of the phase, the vendor will invoice for any applicable phase payments. Milestone payment amount shall either be a fixed fee or hourly based on the amount of time spent on the milestone up to a not-to-exceed limit.

### **F.6 Additional Users and Modules**

The Society will require “price protection” for a minimum of two (2) years from the effective date of the agreement for additional Society users and modules that are listed in the proposal but are not initially purchased.

### **F.7 Restrictions on Growth**

The Society requires that any proposed licenses or fees to access the software be adequate to allow the Society to use the system unrestricted for all business purposes of the Society. The Society will not be subject to expansion fees, additional license purchases, or fees for additional users, increases in Society employee count, budget size, population size, or data storage requirements for a period of not less than 10 years from the effective date of the agreement.

### **F.8 Delivery of the Project Plan**

The project plan is to be delivered within a contractually specified timeframe after contract signing. Delay or failure to complete in a timely manner in this regard will result in the assessment of liquidated damages up to Ksh 2,000 per day.





## Section G: Acceptance and Performance

After the implementation of the Integrated ERP System, the sign-off by the Society will be based on the following criteria:

- Successful implementation of all required modules
- Fully operational system installed and that will be used by all business units across the Society's departments.
- The system vendor has provided all the critical data reports, interfaces and forms required by the users.
- Availability of system, installation, technical, training and user manuals in both hard and soft copies.
- Users are adequately trained and capable of independently operating as well as managing the system.
- Systems Health Checklists - Data, Systems, Processes, and reports
- The system vendor's ability to readily and willingly assist ASK undertake any required data cleansing, conversion and migration activities so as to ensure there is no backlog in transaction processing.



## Section H: Attachments

### H.1 Attachment 1 (RFP Submittal Checklist)

Section	Item	Submitted
H.2	Attachment 2 (Vendor Statement)	
H.3	Attachment 3 (Scope of Proposal)	
H.4	Attachment 4 (Company Background)	
H.5	Attachment 5 (Reference Form)	
H.6	Attachment 6 (Technical Specifications)	
H.7	Attachment 7 (Maintenance and Support)	
H.8	Attachment 8 (Functional Requirements)	



## H.2 Attachment 2 (Vendor Statement)

### PROPOSAL FORM

#### ERP Solution and Implementation Services

#### VENDOR'S STATEMENT

I have read and fully understand all the special conditions herein set forth in the foregoing paragraphs, and by my signature set forth hereunder, I hereby agree to comply with all said special conditions as stated or implied. In consideration of the above statement, the following proposal is hereby submitted.

Name of Company representative

Signature and Stamp

_____	_____
Company Name	Date
_____	_____
Address	Signature
_____	_____
City, Postal Code	Printed Name
_____	_____
County	Title
_____	_____
Telephone	Fax
_____	_____
E-mail Address	_____



### H.3 Attachment 3 (Scope of Proposal)

Identify the scope of the proposal and if the proposal contains software and services for each scope option. Scope options are defined in the RFP in section B.2 and Section B.3.

#### Software and Implementation Services:

Primary Software Firm \_\_\_\_\_  
Software Product Proposed \_\_\_\_\_ Version \_\_\_\_\_  
Primary Implementation Firm \_\_\_\_\_

#### Third Party Products/Services

Third Party Products/Services Proposed  
 No Third Party Products/Services Proposed

Firm _____	Purpose _____
Firm _____	Purpose _____
Firm _____	Purpose _____
Firm _____	Purpose _____
Firm _____	Purpose _____
Firm _____	Purpose _____

#### Name of Individual / Firm Submitting Proposal:

\_\_\_\_\_

#### Signature of Vendor:

\_\_\_\_\_



#### **H.4 Attachment 4 (Company Background)**

Complete one form for each firm included in the proposal.

Company Name:

Location of corporate headquarters:

#### **Vendor Experience**

Number of years in business:

Number of years providing systems/services to public sector:

#### **Customer Base:**

Number of clients using proposed software/services

Last five most recent contracts

#### **Market Focus:**

Identify other industries that your solution serves

#### **If not Primary Vendor**

Number of past projects partnering with primary Vendor

Official Partnership status/certification (if applicable)

#### **About the Company**

Number of Total Employees:

Number of Employees Providing Implementation Services (if applicable)

Number of Employees Supporting Product (Maintenance and Support) (if applicable)

Number of Employees Dedicated to Product Development (if applicable)



**H.5 Attachment 5 (Reference Form)**

Please provide at least five (5) references for past projects that include products and services similar to those proposed for this RFP. Please use the following format in submitting references.

NOTE: References should be submitted for each company proposed to work on this project.

**GENERAL BACKGROUND**

**Name of Client:**

Project Manager Contact \_\_\_\_\_ Title \_\_\_\_\_

Software Program/Version \_\_\_\_\_

Phone \_\_\_\_\_ Email \_\_\_\_\_

Website \_\_\_\_\_

Summary of

Project: \_\_\_\_\_

**Number of Employees:** \_\_\_\_\_ **Size of Operating Budget:** \_\_\_\_\_

**PROJECT SCOPE**

**Please indicate (by checking box) functionality installed:**

- |                                     |  |  |
|-------------------------------------|--|--|
| <input type="checkbox"/> Financials | <input type="checkbox"/> Human Resources | <input type="checkbox"/> Permitting/Business License |
| <input type="checkbox"/> Purchasing | <input type="checkbox"/> Payroll         | <input type="checkbox"/> Supply Chain                |

**TECHNOLOGY INFORMATION**

Server Platform:

Database Platform:

Desktop Platform:

**IMPLEMENTATION INFORMATION**

Project Duration: \_\_\_\_\_

Initial Go-Live: \_\_\_\_\_

Describe Role on Project: \_\_\_\_\_

Project Challenges: \_\_\_\_\_

Major Accomplishments: \_\_\_\_\_



## H.6 Attachment 6 (Technical Specifications)

### Infrastructure

- Optimal and minimum network requirements
- Optimal and minimum database requirements
- Optimal and minimum application server requirements
- Optimal and minimum database server requirements
- Optimal and minimum desktop (client) requirements
- Browser requirements

If client software is required to be installed on the desktop, describe the application

### Reporting

- Does the software come with a report writer?
- (Which one)
- Does the report writer utilize a separate database?

### Security

- What security tools are provided in software?
- Does system support Active Directory?

### System Administration

- Provide a list of all system administrator tools and their functions
- Provide benchmark statistics for proposed application. Benchmarks should be based on Microsoft Windows Servers and Microsoft Windows desktops
- How often are major upgrades released?
- How often are patches and fixes released?



## H.7 Attachment 7 (Maintenance and Support)

### Post-implementation Support:

- Days of on-site support after go-live
- Other on-site support after go-live (month end, quarter end, year-end, open enrollment, etc.)

### Telephone Support:

- Hours available (and time zone)
- Problem Reporting and Resolution Procedures
- Response time for various levels of severity

### Third Parties:

Support provided for third party products?

### Upgrades/Patches:

- Upgrade Frequency (major and minor releases)
- How are upgrades delivered?
- How many versions are currently supported?