

Terms of Reference

Development of a web-based member services portal for FKE Members

Date of circulation: 16th September 2020 Deadline for submission: 30th September 2020

Federation of Kenya Employers (FKE) is an employers Federation registered in January 1959 under the provisions of the Trade Unions Act (CAP.233) (now repealed)

FKE offers services to its members and acts as the secretariat to all businesses and employer associations in Kenya. FKE's key mandate includes but is not limited to labour relations advice and support, legal advice & representation in The Employment & Labour Relations Court (ELRC), policy, advocacy & lobbying and advice on workplace employee wellness and policy implementation. The Federation has three regional offices in Mombasa, Nakuru and Kisumu which covers Coast, Rift Valley and Western Kenya.

FKE wishes to engage a qualified software firm to develop a web based online member services portal which will provide FKE members with access to online resources and self-service capabilities to enable them use online a wide range of services from the FKE portfolio.

1. Background and Context

The development of member services portal is aimed at supporting FKE's strategic objective one which is to enhance members satisfaction. One of the strategies identified to achieve the objective is adoption of technology in service delivery. Through the project, FKE hopes to improve on the delivery of services to members and to empower them with DIY features to enhance service turnaround time. The system design will broadly adopt a three-strand strategy:

1. Module for members which shall include but not limited to member profile and services management. Online member interaction through both live chat and chatbots.
2. Module for FKE which shall include but not limited to Subscriptions fees platform management for members, events and communications management for both members and non-members.

3. Module for content management which shall include but not limited to content management.

2. Consultancy Task

FKE is soliciting proposals from competent software, data science and communications firms to develop a web based online member services and communication portal to enable them to achieve the following:

For Members:

- Make FKE services easily available to members-User friendly interface
- Share online resources for members e.g. Publications, research papers, economic indicators, e-shots & changes in law.
- Facilitate members to know status update on service offered to them through Integration with CRM
- Update on membership payment information & print invoice and statement
- Self-update member information through the portal
- Members corner where they can submit news and events
- Receive communication- Integration with email marketing & communication platforms
- Provide online HR templates (listed below) to assist members.
- Online registration & payment for FKE events for both members and non-members-Integration with events platforms e.g. Eventbrite and payment platforms e.g. Mpesa
- Online registration & payment for FKE training programs for both members and non-members - Integration with payment platforms e.g. Mpesa
- Online request/scheduling of appointments with FKE officers for members
- Online request for commercial services for both members and non-members - Request for proposals

For FKE:

- Centralized management of member contacts and communications-Integration with email marketing & communication platforms
- Process membership payments for subscriptions-Integration with payment platforms e.g. Mpesa
- Online membership invoicing & reminders generation
- Accuracy of member information
- Increase in uptake of FKE services.
- Increase in attendance of FKE events.
- Increase in membership base -Online member recruitment
- Collect data from members for market intelligence through online surveys- Integration with online survey tools

- Serving more members with less staff – more effective through adaptation of technology in service delivery
- Report on members served

As part of refining the system requirements, the consultant will be expected to engage with some FKE members as part of stakeholder participation.

Content development

Through the portal, the following contents shall be availed to the members as part of the services online:

- Frequently asked questions
- Standard guidelines
 - Redundancy procedures
 - Disciplinary procedures
 - Employment contract
- Guidelines on policies:
 - HR
 - Harassment & violence at work
 - Discrimination
 - Management of HIV at the workplace
 - OSH
 - Gender equality
- Templates:
 - CBAs – template
 - Recognition Agreement
 - Return to work formula
- HR Templates (Pay as you go services)
 - Warning letters
 - Termination letter
 - Employment contract
 - Notice to show cause
 - Appointment letter
- Legal
 - Summary of judgements
 - IR & Legal audits

3. Other requirements

- a. Ability to be fully integrated with existing systems- Sage ACCPAC and Sugar CRM (Open source)
- b. Support for multi-user, multi-site computing environment
- c. Able to provide analytical tools and indicators - Dashboard
- d. Must support ad-hoc query and have pre-defined reports
- e. Have an easy and friendly user interface;
- f. Simple to upload contents;
- g. Optimized for search engines;
- h. Must have easy to use report writing and query tools
- i. Facility for data import and export from and to other systems
- j. Training and support
- k. Cloud storage for data
- l. Highly scalable

The database requirements of the system to include but not limited to:

- a. Must support to high volume on-line transactions processing (OLTP)
- b. High availability with database mirroring, online back-up and recovery
- c. High scalability, and performance
- d. Highly relational with object-relational capabilities
- e. Integration with other databases and legacy systems

For purposes of data security, the system should have but not limited to the following features:

- a. Ensure proper user authentication
- b. Manage the assignment of database access privileges using identity of the user
- c. Database Integrity - users must be able to define multi-level referential integrity, entity integrity and value constraints without programming.
- d. User audits
- e. Guarantee privacy and integrity of data through encryption

4. Consultancy Outputs

The consultant is expected to develop the web based online member services portal and have the system installed and accessed online by FKE paid up members. The output of the contract is as follows:

1. Web based online member services portal developed as per the specifications, tested and deployed for use
2. FKE staff trained on both the system usage and administration
3. Members video tutorial on usage
4. System User Manual/Guide
5. The consultant will provide technical support and participate during the launch of the portal, at a date to be determined by FKE.
6. Support contract commencing at the end of the 3 months period after go-live to be signed between FKE and the developing firm.

5. Timelines

The assignment should take no more than 3 months from contract signing.

6. Management

The consultant will be directly supervised by FKE, with relevant technical advice, inputs and support provided by the project steering committee. Project plan with clear deliverables shall be prepared and presented by the consultant and the project to commence upon adoption of the plan by the steering committee.

7. Qualifications and Experience

Preference will be given to consultants with at least 3 years of expertise in developing mature and robust portals. It will be necessary for consultants to provide the relevant competency credentials.

The consultant will have to show in-house capacity to provide services in the data science field to service our marketing technology and reporting needs, communication to help FKE with correct messaging and strategic marketing to our clients.

The consultants ought to show evidence of having provided solutions within the payment space.

8. Terms of Payment

Payment is linked to deliverables; FKE reserves the right to withhold payment for any part of the assignment if the quality of the deliverables does not meet professional standards.

Payment will be based on the following schedule:

- 40% upon contract signing, presentation and approval of an inception report;
- 40% upon completion of the development, presentation of key deliverables as agreed upon in the inception report and successful testing but before Go-live;
- 20% payable 3 months after Go-live and proof of no fault and bugs.

9. Submission of Bids

Interested and Qualified firms/Consultants are invited to submit:

- a) A Technical proposal indicating among others: How their solution meets the indicated FKE needs, capabilities of the system and the platform it operates on and any value-added services among others
- b) A proposed workplan for delivery and deployment of the system indicating key milestones
- c) A Financial proposal for initial implementation of the project and subsequently maintaining it thereafter. The Firm/Consultant should also indicate the proposed payment plan.
- d) A list of clients currently utilizing the firm's/consultants developed solutions for FKE review
- e) Accompanying documents including CVs of key personnel for project implementation and company financials for the last 3 years for FKE consideration.
- f) A soft copy of the proposal on a flash disk to accompany the hard copy.

The proposal and accompanying documents must be received by COB on **30th September 2020**, delivered to the address below:

REF: DEVELOPMENT OF A WEB-BASED MEMBER SERVICES PORTAL

**C/O Ag. Head, Finance & Procurement
Federation of Kenya Employers
P. O. Box 48311 - 00100,
Nairobi.**