



**REQUEST FOR PROPOSAL (RFP) FOR THE SUPPLY,  
DESIGN, IMPLEMENTATION, COMMISSIONING AND  
SUPPORT FOR MICROSOFT DYNAMICS 365 BUSINESS  
CENTRAL (D365 BC) ERP UPGRADE PROJECT**

**RFP Reference No.: NSS/01/FEB/2025**

<b>RFP Due Date:</b>	<b>11<sup>th</sup> March 2025. 5:00pm EAT</b>
<b>RFP Submission:</b>	<p>The tender documents with details can be downloaded from the Nation DT Sacco Society Website <a href="https://nationsacco.com/">https://nationsacco.com/</a> for free. Prospective bidders are required to register through the link: <a href="https://bit.ly/ProjectAuroraRFP">https://bit.ly/ProjectAuroraRFP</a></p> <p>Completed tender documents should be sent via email to <a href="mailto:tenders@nationsacco.com">tenders@nationsacco.com</a> as defined in this RFP and addressed to:</p> <p><b>The Chief Executive Officer. Nation DT Sacco Society Ltd P.O Box 22022 – 00400 <u>Nairobi, KENYA</u></b></p>
<b>Questions/Clarification Contact:</b>	<a href="mailto:tenders@nationsacco.com">tenders@nationsacco.com</a>
<b>Pre-Bid Conference</b>	<b>4<sup>th</sup> March, 2025. 11:00am EAT</b>

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## SECTION 1: LETTER OF INVITATION / INVITATION TO TENDER

Dear Prospective Bidder,

Nation DT Sacco Society Ltd, a Deposit-Taking Sacco licensed by the Sacco Societies Regulatory Authority (SASRA), invites proposals from qualified firms for the **Supply, Design, Implementation, testing, commissioning and Support of Microsoft Dynamics 365 Business Central (D365 BC)**. This project involves upgrading from our current ERP to modernize operations, improve member experience, ensure regulatory compliance, and enhance data-driven decision-making.

The RFP document provides detailed information on the scope of work, requirements, terms of reference, evaluation criteria, and other relevant details.

Bidders will be selected on a Quality and Cost Based Selection basis and the procedures described in this RFP. The Bidder will attach a declaration in the proposal, that they are not barred from participating in procurement proceedings and that they will not engage in any corrupt practice as per the attached declaration form.

Completed tender documents should be sent via email to [tenders@nationsacco.com](mailto:tenders@nationsacco.com) with the subject line bearing the tender reference and addressed to:

**The Chief Executive Officer.**  
**Nation DT Sacco Society Ltd**  
**10<sup>th</sup> Floor, IPS Building, Kimathi Street**  
**P.O Box 22022 – 00400**  
**Nairobi, KENYA.**

to be received on or before **11th March 2024, 5:00 PM EAT.**

## SECTION 2: INSTRUCTIONS TO BIDDERS (ITB)

### 2.1 Eligible Bidders

- 2.1.1 Firms duly registered and licensed to provide Microsoft Dynamics 365 Business Central solutions.
- 2.1.2 Demonstrable experience in implementing ERP solutions in the financial services industry, especially the Sacco sector.
- 2.1.3 Demonstrable innovations and/or automations in the same sector

### 2.2 Information to Bidders

- 2.2.1 The **Procuring Entity, Nation DT Sacco Society Ltd (“The Sacco”)** will select Bidders among those who submit a proposal, per the method in 2.3
- 2.2.2 Bidders may associate with other firms to enhance their qualifications, but should indicate clearly whether the association is in the form of a joint venture and/or a sub-consultancy.
- 2.2.3 In the case of a joint venture, all the partners in the joint venture shall be jointly and severally liable for the entire contract, if selected. There must be clear evidence attached of a binding contract between the partners
- 2.2.4 The Bidders are invited to submit a Technical Proposal and a Financial Proposal, as specified in this document for supply, design, implementation, testing, commissioning and support of a core banking system ERP upgrade. The proposal will be the basis for contract negotiations and ultimately for a signed contract with the selected firm.
- 2.2.5 Nation DT Sacco Society Ltd will provide all the necessary inputs needed to carry out the services and make available any relevant information.
- 2.2.6 The costs of preparing the proposal and of negotiating the Contract, including any visit to the Procuring Entity are not reimbursable as a direct cost of the assignment; and
- 2.2.7 Nation DT Sacco Society Ltd is not bound to accept any of the proposals submitted.
- 2.2.8 Nation DT Sacco Society Ltd employees, board members, and their relatives (spouses and children) are not eligible to participate.

### 2.3 Procurement Method

- 2.3.1 Bidders will be selected on the **Quality and Cost Based** procurement method.
- 2.3.2 Bidders must adhere strictly to all requirements and deadlines specified in this document.
- 2.3.3 Proposals should be prepared in such a way as to provide a straightforward, concise delineation of capacities to satisfy the requirements of the RFP.
- 2.3.4 Emphasis should concentrate on conformance to the RFP instructions, responsiveness to RFP requirements, and on completeness and clarity of content. All proposals and accompanying documents become the property of Nation DT Sacco Society Ltd

- 2.3.5 In responding to this RFP, the vendor accepts the responsibility fully to understand the RFP in its entirety, and in detail, including making any inquiries to Nation DT Sacco Society Ltd as necessary to gain such understanding. Nation DT Sacco Society Ltd reserves the right to disqualify any vendor who demonstrates less than such understanding.
- 2.3.6 Further, Nation DT Sacco Society Ltd. reserves the right to determine, at its sole discretion, whether the vendor has demonstrated such understanding. That right extends to cancellation of the award if it has been made.
- 2.3.7 Such disqualification and/or cancellation shall be at no fault, cost, or liability whatsoever to Nation DT Sacco Society Ltd
- 2.3.8 All information provided by Nation DT Sacco Society Ltd. in this RFP is offered in good faith without liability.
- 2.3.9 Individual items are subject to change at any time. Nation DT Sacco Society Ltd. makes no certification that any item is without error. The Sacco is not responsible or liable for any use of the information or for any claims asserted there from.

## **2.4 Communication**

- 2.4.1 Verbal communication shall not be effective unless formally confirmed in writing by the Sacco's Project Manager in charge of managing this RFP process, or the CEO of the Procuring Entity.
- 2.4.2 In no case shall verbal communication govern over written communication.
- 2.4.3 Bidders inquiries, questions, and requests for clarification related to this RFP are to be directed in writing to: [tenders@nationsacco.com](mailto:tenders@nationsacco.com)
- 2.4.4 And addressed to:

**The Chief Executive Officer.**  
**Nation DT Sacco Society Ltd**  
**10<sup>th</sup> Floor, IPS Building, Kimathi Street**  
**P.O Box 22022 – 00400**  
**Nairobi, KENYA**

- 2.4.5 All bidders are MUST register first at this link <https://bit.ly/ProjectAuroraRFP> to be able to receive all the latest information pertaining to this RFP.

## **2.5 Clarifications and Addenda**

- 2.5.1 Bidders shall address all clarifications in writing to [tenders@nationsacco.com](mailto:tenders@nationsacco.com).
- 2.5.2 Any addenda or clarifications will be shared with all prospective bidders who have registered.

## **2.6 Preparation of Technical Proposals**

- 2.6.1 Bidders shall submit Technical and Financial proposals in separate electronic documents to the above email address.

- 2.6.2 Mark the Technical Proposal file attachments (or files) clearly:  
**“Technical Proposal – RFP [Reference Number]”**
- 2.6.3 The Bidder’s proposal shall be presented in the English language.
- 2.6.4 In preparing the Technical Proposal, Bidders are expected to examine the documents constituting this RFP in detail. Material deficiencies in providing the information requested may result in the rejection of a proposal.
- 2.6.5 It is expected that the majority of the key professional staff proposed to be permanent employees of the firm or have an extended and stable working relationship with it.
- 2.6.6 Proposed professional staff must as a minimum, experience indicated in the Appendices, preferably working under conditions similar to those prevailing in Kenya.
- 2.6.7 The Technical Proposal shall provide the following information using the Standard Forms in the appendix;
- i) The Company Profile
  - ii) A brief description of the firm's organization and an outline of recent experience (last 5 years) on assignments of a similar nature. For each assignment use the **Bidder Experience Form** (Form 5), the outline should indicate inter alia, the profiles of the staff proposed, duration of the assignment, the contract amount and the firm's involvement.
  - iii) Any comments or suggestions on the Request for proposal, a list of services and facilities to be provided by the Sacco.
  - iv) A description of the methodology and work plan for performing the assignment.
  - v) The list of the proposed staff team by specialty, the tasks that would be assigned to each staff team member, and their timing.
  - vi) Where a bidder’s staff performs multiple roles as outlined in 4.3 in the RFP, clearly indicate the same in the technical proposal.
  - vii) CVs recently signed by the proposed professional staff and the authorized representative submitting the proposal. Key information should include the number of years working for the firm/entity and the degree of responsibility held in various assignments during the last five (5) years.
  - viii) A detailed description of the proposed methodology, staffing, and monitoring of training, as training is a major component of the assignment.
  - ix) A detailed system architecture design with specific server hardware and software specification for optimal performance of the solution
  - x) Any additional information as requested in the Appendices.
- 2.6.8 The Technical Proposal shall not include any financial information.

## 2.7 Preparation of Financial Proposals

- 2.7.1 Mark the Financial Proposal file attachments (or files) clearly:  
**“Financial Proposal – RFP [Reference Number]”**
- 2.7.2 **The File attachments must be password protected/locked.** Only bidders who have passed the Technical evaluation stage shall be requested to share

passwords to their financial proposals through the formal email address from the Sacco.

- 2.7.3 In preparing the Financial Proposal, Bidders are expected to take into account, the requirements and conditions outlined in the RFP documents. The Financial Proposal should follow the Standard Forms.
- 2.7.4 It should list all costs associated with the project delivery including;
- i) Cost of delivering the solution
  - ii) Implementation Costs
  - iii) Business Ready Enhancement Plan (BREP) annual fees, if applicable
  - iv) Annual Support Fees, and when this is due to be paid
  - v) Remuneration for staff (in the field and at headquarters), and;
  - vi) Reimbursable expenses such as subsistence (per Diem), transportation services, equipment Motor vehicles, and other supplies, insurance, the printing of documents, surveys, and training, if it is a major component of the assignment.
- 2.7.5 If applicable these costs should be broken down by activity. This is however, not mandatory.
- 2.7.6 The Financial Proposal should identify as a separate amount, the local taxes, duties, fees, levies, and other charges imposed under the law on the Bidders, the sub-Bidders, and their personnel. These costs should be included in the total financial proposal cost.
- 2.7.7 Bidders shall express the price of their services in Kenya Shillings.
- 2.7.8 Commissions and gratuities, if any, paid or to be paid by Bidders and related to the assignment will be listed in the Financial Proposal Submission Form.

## **2.8 Deadline for Submission**

- 2.8.1 Proposals must be received by **5:00pm EAT, 11<sup>th</sup> March, 2025** to the email address provided.
- 2.8.2 Proposals received after the due date and time will not be considered and will be returned unopened to the sender.
- 2.8.3 Regardless of the method used for delivery, Respondents shall be wholly responsible for the timely delivery of submitted proposals.
- 2.8.4 After the deadline for submission of proposals, the Technical Proposal shall be opened immediately by the tender opening committee.
- 2.8.5 The Financial Proposal shall remain sealed/locked up to the time for the opening of financial proposals. Only bidders who have passed the technical evaluations shall be formally contacted to provide passwords to open the financial proposals.

## **2.9 Validity of Proposals**

- 2.9.1 Proposals shall remain valid for a period of ninety (90) days from the submission deadline. During this period, the Bidder is expected to keep available, at their own cost, the professional staff proposed for the assignment.

- 2.9.2 The Sacco will make their best effort to complete negotiations within this period. If the Sacco wishes to extend the validity period of the proposals, the Bidders shall agree to the extension.

## 2.10 Selection and Notification

- 2.10.1 Bidders determined by Nation DT Sacco Society Ltd to possess the capacity to compete for this project will be selected to move into the demo and presentation stage
- 2.10.2 Bidders who shall be deemed successful at the demo stage will be selected to move into the negotiation and contracting phase of this process.
- 2.10.3 Written notifications will be sent via email to the successful and non-successful bidders.
- 2.10.4 The Procuring Entity may at any time terminate procurement proceedings before contract award and shall not be liable to any bidder for the termination.
- 2.10.5 The procuring Entity shall give prompt notice of the termination to the bidders and on request may give its reasons for termination within 14 days of receiving the request from any bidder.

## 2.11 Confidentiality

- 2.11.1 Information relating to the evaluation of proposals and recommendations concerning awards shall not be disclosed to the Bidders who submitted the proposals or to other persons not officially concerned with the process until the winning firm has been notified that it has been awarded the Contract.
- 2.11.2 Corrupt or Fraudulent practices
- i) The Procuring Entity requires that the Bidders observe the highest standards of ethics during the selection and award of the Supply and Consultancy contract and also during the performance of the assignment. The bidder shall sign a declaration that he has not and will not be involved in corrupt or fraudulent practices.
  - ii) The Bidder shall declare whether or not they have a conflict of interest.
  - iii) The Procuring Entity will reject a proposal for award if it determines that the Bidder recommended for award has engaged in corrupt or fraudulent practices in competing for the contract in question.
  - iv) Further a Bidder who is found to have indulged in corrupt or fraudulent practices risks being debarred from participating in public procurement in Kenya.

## 2.12 Performance Security

- 2.12.1 The winning bidder shall be required to provide a performance bond of **10% of the tender price of the contract amount**.
- 2.12.2 Within thirty (30) working days of receipt of the notification of contract award, the successful bidder shall furnish to the Procuring Entity, the performance



security where applicable in the amount specified in Special Conditions of Contract.

- 2.12.3 The proceeds of the performance security shall be payable to the Procuring Entity as compensation for any loss resulting from the Bidder's failure to complete its obligations under the Contract.
- 2.12.4 Performance security shall be denominated in the currency of the Contract or a freely convertible currency acceptable to the Procuring Entity and shall be in the form of a bank guarantee.
- 2.12.5 Performance security will be discharged by the Procuring Entity and returned to the candidate not later than twenty-eight (28) days following the date of Completion of the bidder's performance of obligations under the contract, including any warranty obligations under the contract.

## 2.13 Taxes

- 2.13.1 **"Taxes"** means all present and future taxes, levies, duties, charges, assessments, deductions or withholdings whatsoever, including any interest thereon, and any penalties and fines with respect thereto, wherever imposed, levied, collected, or withheld under any regulation having the force of law and "Taxation" and shall be construed accordingly.

### 2.13.2 Local Taxation

- i) Nothing in the Contract shall relieve the Bidder and/or their Sub-Contractors from their responsibility to pay any taxes, statutory contributions, and levies that may be levied on them in Kenya in respect of the Contract. The Contract Price shall include all applicable taxes and shall not be adjusted for any of these taxes.
- ii) The Bidder shall be deemed to be familiar with the tax laws in the Procuring Entity's Country and satisfied themselves with the requirements for all taxes, statutory contributions, and duties to which they may be subjected during the term of the Contract.
- iii) In instances where discussions are held between the Procuring Entity and the Bidder regarding tax matters, this shall not be deemed to constitute competent advice and hence does not absolve the Bidder of their responsibility to due diligence on the tax issue.

### 2.13.3 Tax Deduction

- i) If the Procuring Entity is required to make a tax deduction by Law, then the deduction shall be made from payments due to the Bidder and paid directly to the Kenya Revenue Authority. The Procuring Entity shall upon remitting the tax to Kenya Revenue Authority furnish the Bidder with the relevant tax deduction certificates.

### 2.13.4 Tax Indemnity

- i) The Bidder shall indemnify and hold the Procuring Entity harmless from and against any liabilities, which the Employer

may incur for any reason of failure by the Bidder to comply with any tax laws arising from the execution of the Contract whether during the term of the Contract or after its expiry.

- ii) The Bidder warrants to pay the Procuring Entity (within fourteen (14) days of a formal demand from the Procuring Entity), an amount equal to the loss, liability, or cost which the Procuring Entity determines has been (directly or indirectly) suffered for or on account of the Bidder's Tax liability arising from the Contract.
- iii) Where the amount in 2.13.4 ii) above remains unpaid after the end of the fourteen (14) days moratorium, the Procuring Entity shall be entitled to compensation for financing charges.

## SECTION 3. BACKGROUND INFORMATION

### 3.1 Introduction

Nation DT Sacco Society Ltd is a Deposit-Taking Sacco licensed under the Sacco Societies Act and regulated by SASRA. The Sacco aims to maintain financial stability, expand our member base, and improve service delivery. We currently use MS Dynamics Navision 2015 for core banking and back-office operations and we are seeking to upgrade to MS Dynamics 365 Business Central.

The project dubbed “**Project Auror@**” is a digital-first approach designed to automate, modernize and scale Sacco operations. It is envisaged to provide a solid platform for the Sacco’s digital transformation strategy.

It is important to note that the Sacco has existing alternative channels in place. This includes a ATM cards, mobile app, USSD and internet banking platform.

### 3.2 Project Objectives

**Project Auror@** is expected to achieve the following;

- i) Implement a robust, scalable ERP solution (D365 BC) tailored to Nation DT Sacco operations.
- ii) Enhance efficiency across core functions such as FOSA banking, credit management, procurement, HR, finance, and risk management.
- iii) Seamlessly integrate with third-party systems (banks, payment service providers, credit bureaus, etc.).
- iv) Provide real-time reporting and analytics for data-driven decision-making.
- v) Strengthen ICT security, data governance, and regulatory compliance (SASRA, Data Protection Act, POCAMLA, etc.).
- vi) Leverage on new technologies to automate and digitize Sacco processes.
- vii) Seamless integration with alternate channels already in place.

## SECTION 4: TERMS OF REFERENCE (TOR)

### 4.1 Scope of Work

The services to be rendered by the successful bidder involves:

- i) End-to-end implementation of MS Dynamics 365 Business Central with all essential modules.
- ii) Customization of system workflows for SACCO-specific requirements (e.g., share capital, dividend processing, unique savings products).
- iii) Data migration from MS Dynamics Navision 2015 and other legacy data sources.
- iv) Integration with external systems (alternative channels providers, banks, mobile money providers, payment service providers, credit bureaus, etc.).
- v) Training, change management, quality assurance, and post-implementation support.

### 4.2 Specific Deliverables: Tasks to be Performed

Below are the key activities and responsibilities expected of the successful bidder:

Deliverable	Details
<b>i) Project Governance and Management</b>	<ul style="list-style-type: none"> <li>• Bidder to assign a Project Manager and define roles and responsibilities for each workstream as guided by these terms of reference.</li> <li>• Be part of a Project Steering Committee (jointly with the Sacco).</li> <li>• Develop and maintain a detailed project plan—defining timelines, milestones, and deliverables with approvals from the Sacco</li> </ul>
<b>ii) Business Process Review and Documentation</b>	<ul style="list-style-type: none"> <li>• Review current Functional Requirements Document developed by the Sacco</li> <li>• Conduct an in-depth analysis to familiarize with the Sacco's current business processes.</li> <li>• Update and recommend requirement/process flows leveraging standard D365 BC functionalities.</li> </ul>
<b>iii) Implementation and Customization</b>	<p>Configure standard modules of D365 BC to address:</p> <ul style="list-style-type: none"> <li>• Member onboarding &amp; customer service</li> <li>• FOSA banking &amp; teller operations</li> <li>• Loan/credit management</li> <li>• Finance &amp; accounting</li> <li>• Procurement</li> <li>• HR &amp; payroll</li> <li>• Risk management &amp; compliance</li> <li>• Business intelligence &amp; analytics</li> <li>• ICT security &amp; administration</li> <li>• Customize or develop additional functionalities specific to a DT-SACCO (e.g., share capital, dividend management, local regulatory reporting).</li> </ul>

Deliverable	Details
iv) Data Migration	<ul style="list-style-type: none"> <li>Evaluate existing data from MS Dynamics Navision 2015.</li> <li>Develop a mapping strategy to ensure data integrity during migration.</li> <li>Implement data validation processes and retain an audit trail.</li> <li>Successful migration of all Sacco data and get signoffs</li> </ul>
v) Systems Integration	<ul style="list-style-type: none"> <li>Integrate with external banking systems for settlement, direct debits, ATM networks, mobile, USSD, etc.</li> <li>Integrate with payment service providers (M-Pesa, Airtel Money, etc.).</li> <li>Implement secure APIs or other methods for real-time/batch data exchange with all integration partners.</li> </ul>
vi) ICT Security and Compliance	<ul style="list-style-type: none"> <li>Implement role-based access controls (RBAC) and audit trails.</li> <li>Ensure compliance with Kenya Data Protection Act and other relevant security standards (ISO 27001).</li> <li>Provide a business continuity and disaster recovery plan.</li> </ul>
vii) Testing and Quality Assurance	<ul style="list-style-type: none"> <li>Conduct unit, integration, system, and user acceptance testing (UAT).</li> <li>Document test cases, track issues, and remediate prior to go-live.</li> <li>Obtain user sign-off for each milestone.</li> </ul>
viii) Training and Change Management	<ul style="list-style-type: none"> <li>Develop a comprehensive training plan for all user levels (end-users, system admins, managers).</li> <li>Provide training materials and user manuals.</li> <li>Implement change management strategies to foster user acceptance.</li> </ul>
ix) Go-Live and Post-Implementation Support	<ul style="list-style-type: none"> <li>Execute a go-live strategy, including cutover activities and system stabilization.</li> <li>Provide free post-implementation support for the first year.</li> </ul>
x) Reporting and Deliverables	<ul style="list-style-type: none"> <li>Regularly submit progress reports to the Sacco's Project Manager and Committee.</li> <li>Deliver complete project documentation (configurations, customizations, SOPs).</li> <li>Provide a final project report upon closure.</li> </ul>
xi) Annual Maintenance and Support	<ul style="list-style-type: none"> <li>Annual Support and maintenance of the system</li> <li>Define SLAs and an issue escalation mechanism.</li> </ul>

### 4.3 Qualifications and Expertise

The ideal bidder should possess the following qualifications:

1. Duly registered and with a tax compliance certificate.

1. The bidder firm must have been in existence for at least 10 years and have a clear track record for ERP solutions in the financial services sector, especially Saccos.
2. The firm must have conducted several ERP implementation in the Sacco sector, specifically with at least five (5) implementations.
3. *User-Centric Approach*: The firm should adopt a user-centric design approach, prioritizing the needs and preferences of the Sacco, members, and other stakeholders. A focus on usability and accessibility will be integral to the successful adoption of the proposed ERP system.
4. *Data Privacy and Security Expertise*: The firm should have in-depth knowledge of data privacy laws and international data security standards. They must demonstrate the ability to design and implement robust data protection measures within the ICT system to safeguard sensitive information.
5. *Resources and Infrastructure*: Have access to the necessary resources, infrastructure, and tools required for successful ERP upgrade. Adequate technical capabilities and resources are essential for efficient project delivery.
6. *Quality Assurance and Compliance*: Have a robust quality assurance framework to ensure the accuracy, completeness, and compliance of their deliverables with the project requirements and established standards.
7. *Educational Background*: The key personnel leading the project should possess graduate degrees in relevant fields such as Information Technology, Computer Science, Software Engineering, or a related discipline.
8. Have a team of highly skilled and experienced professionals with expertise in information technology, software development, systems analysis, financial industry, data management, and cybersecurity.

To deliver a successful ERP upgrade, the bidder’s team should include the following key expertise (where an expert performs multiple roles in the project, indicate in technical proposal):

Key Expert	Key Responsibilities/Expectations in the Project
Project Manager	Oversees the entire ERP implementation, coordinates the bidder’s teams, manages schedules, risks, and serves as the primary liaison with Sacco’s project manager and project team.
Business Analyst	Works with Sacco management and end users to review the current FRD from the Sacco and document business requirements, analyse current workflows, and translate needs into technical specifications.
ERP Consultant / Subject Matter Expert (SME)	Provides industry-specific insights, advises on best practices, ensures compliance with regulatory requirements, and tailors the system to the Sacco’s operational needs.
System Architect	Designs the overall technical framework and integration strategy, ensuring all components of the ERP work together seamlessly and are scalable.
Software Developers / Engineers	Build and customize ERP modules, integrate third-party systems, and ensure the software meets both functional and non-functional requirements.

Key Expert	Key Responsibilities/Expectations in the Project
Quality Assurance (QA) and Testing Specialists	Implement testing protocols (unit, integration, user acceptance) to ensure the system is defect-free, performs well, and complies with security standards.
Data Migration Specialist	Manages the extraction, transformation, and loading (ETL) of data from legacy systems into the new ERP platform, ensuring data integrity throughout the process.
DevOps / Infrastructure Engineer	Oversees deployment, maintenance, and monitoring of the ERP system, sets up the required infrastructure as provided by the Sacco (cloud or on-premises), and ensures high availability.
Change Management and Training Specialist	Develops training programs and documentation, facilitates user adoption, addresses resistance to change, and provides post-implementation support.
UI/UX Designer	Designs intuitive and user-friendly interfaces to enhance user experience, minimize training needs, and boost overall productivity.
Security Specialist	Focuses on safeguarding the ERP system against cyber threats and ensuring that sensitive financial data is protected.
Integration Specialist	Handles integrations with external systems such as banking platforms, payment gateways, or other financial software to ensure seamless data flow.
Support Engineers	Ensures smooth ERP operations post-production by providing ongoing user assistance, troubleshooting issues, monitoring system performance, applying updates, and facilitating continuous improvements through feedback loops with the development team

## SECTION 5: TECHNICAL REQUIREMENTS

The vendor must demonstrate compliance with the following technical and functional requirements. In the Complied (FA/CS/NA) column, indicate whether you meet the requirement (**FA = Fully Available, CS = Customizable, NA = Not Available**). In the Remarks column, describe the proposed solution or any customization needed.

No.	Module	Feature/ Functionality	Required Specification	Complied (FA/CS/NA)	Remarks
1	Member Management	1.1 Online/ branch-based member registration & KYC	Must capture personal info, ID/passport, contact details, next of kin, etc.; integrate with external KYC services (credit bureau/ID verification).		
		1.2 Automated account opening workflow	Configurable workflow with approval levels for new member accounts, share subscriptions, product enrolment.		
		1.3 Regulatory compliance checks	Validate fields required by SASRA, CBK (for AML/CFT checks).		
		1.4 Member Savings	Share capital, member savings products).		
		1.5 Annual BOSA activities	Rebates and Dividends management, calculation, validation and payment		
2	Customer Service	2.1 Member 360° view	Unified view of member details, transactions, loans, inquiries in one dashboard.		
		2.2 Case management & ticketing (CRM)	Log and track member issues, inquiries, and feedback to resolution.		
		2.3 Reports	Comprehensive member-specific reports for management decision-making		



No.	Module	Feature/ Functionality	Required Specification	Complied (FA/CS/NA)	Remarks
3	FOSA Banking	3.1 Teller operations (deposits, withdrawals, transfers)	Automated teller interface with real-time posting to member accounts.		
		3.2 Mobile money integration	Ability to process mobile wallet transactions (M-Pesa, Airtel Money) for deposits, withdrawals, payments.		
		3.3 ATM/debit card integration	Must support integration with ATM providers for card-based transactions.		
		3.4 Payments Processing	SWIFT, RTGS, Pesalink, direct debits, standing orders, etc.		
4	Finance & Accounting	4.1 General Ledger	Chart of Accounts aligned with IFRS and SASRA reporting formats. At least 5 nesting levels		
		4.2 Dimensions setup (multi dimensional)	Business Units dimensions, disaggregated to Sacco requirements		
		4.3 Budgeting and forecasting	Multi-year budgeting, budget vs. actual analysis, forecasting.		
		4.4 Bank reconciliation	Automated bank statement imports, reconciliation with matching rules.		
		4.5 Fixed assets management	Track asset acquisition, depreciation, location, insurance, disposals, and revaluations.		
		4.6 Payments Processing	Supplier management, payment vouchers, controls, workflows		
		4.7 Statutory Compliance	KRA, SHA, NSSF compliance		
		4.8 Regulatory reporting	Generate SASRA reports in prescribed formats.		
5	Procurement	5.1 Purchase requisition &	Multi-level workflow for requisitions,		

No.	Module	Feature/ Functionality	Required Specification	Complied (FA/CS/NA)	Remarks
		approval workflows	approvals, purchase orders.		
		5.2 Vendor management	Vendor onboarding, performance tracking, and e-procurement integration (if applicable).		
		5.3 Inventory management	Track inventory levels, reorder points, goods received notes, and stock valuation.		
6	Human Resources	6.1 Employee information management	Maintain personal data, job roles, contracts, leave management, salary scales, job grades, etc		
		6.2 Payroll processing	Compute gross pay, statutory deductions (PAYE, NHIF, NSSF), net salaries; generate payslips, bank transfer files, tax returns.		
		6.3 Performance Management	Target setting, performance appraisal, supervisor comments, performance improvement plan, reward mechanism,		
7	Credit Management	7.1 Loan products configuration	Configure multiple loan products, interest rates, fees, repayment terms, loan insurance, etc.		
		7.2 Loan appraisal & approval workflow	Automated credit scoring, approval levels, internal/external checks, email notifications.		
		7.3 Collateral management	Capture collateral details, lien management, and release processes.		
		7.4 Loan disbursement & collection	Integrate with FOSA or external bank accounts; manage automated loan repayment schedules		

No.	Module	Feature/ Functionality	Required Specification	Complied (FA/CS/NA)	Remarks
			and overdue reminders.		
8	Risk Management	8.1 Internal controls & audits	Built-in controls for maker-checker, internal audit trails.		
		8.2 Regulatory compliance	Alerts for regulatory compliance thresholds, suspicious transaction reporting, money laundering checks.		
		8.3 Early warning systems	Loan portfolio monitoring, triggers for delinquency, provisioning, and remedial action.		
9	Business Intelligence	9.1 Dashboards & analytics	Real-time dashboards for financial, membership, and operational metrics.		
		9.2 Ad-hoc reporting & data drill-down	Ability to create custom reports with drill-down to transactional data.		
		9.3 Integration with Power BI	Native connector to Microsoft Power BI for enhanced analytics and visualizations.		
10	ICT Security & Admin	10.1 Role-based access control (RBAC)	Manage user roles/permissions aligned with separation of duties.		
		10.2 Audit trails & logging	Automatic logging of user activities, data changes, system events.		
		10.3 Disaster recovery & business continuity	Provide backup/restore strategy, failover setup, and quick recovery plan.		
		10.4 Regulatory data protection compliance	Comply with Kenya Data Protection Act; secure handling of PII, encryption at rest and in transit.		
11	Staff Self-service Web Portal (Integrated to HR Module in ERP)	11.1 Staff Personal Details	Payslips, Employee bio data, next of kin, staff loans, P9, P10		
		11.2 Leave Management	Apply for leave, approvals, dashboard		

No.	Module	Feature/ Functionality	Required Specification	Complied (FA/CS/NA)	Remarks
		11.3 Performance Management	Employee self-appraisal, feedback mechanism, performance dashboard		
		11.4 Reports	Staff personnel reports		
12	3rd Party Integration	12.1 Bank integration	Secure APIs or file-based integration with partner banks for real-time or batch transactions.		
		12.2 Payment Service Providers (PSPs)	Integration with mobile money platforms, online payment gateways, aggregator systems, etc.		
		12.3 Alternate Channels	Secure APIs Integration with existing mobile app, USSD and internet banking platforms		
		12.4 Other integrations	Potential for credit reference bureaus, insurance systems, regulatory reporting portals, etc.		

## SECTION 6: TENDER EVALUATION CRITERIA

### 6.1 Technical Evaluation

- 6.1.1 The mandatory documents are critical to the bidder's proposal to be evaluated. Any proposal missing any compliance document shall be deemed non-responsive.
- 6.1.2 The procuring entity reserves the right to not proceed with evaluation of a non-responsive bidder.

Evaluation Criteria	Total Points
<p><b>1. MANDATORY DOCUMENTS</b></p> <p>The following Mandatory Documents are required to be submitted:</p> <ol style="list-style-type: none"> <li>a) Certificate of Registration/Incorporation.</li> <li>b) Microsoft Authorization Certificate/Form or a letter Authorizing the bidder to deal with the product(s) under consideration/quoted for.</li> <li>c) Provide copies of audited accounts for the last recent three years (2022,2023 and 2024)</li> <li>d) Valid Tax Compliance Certificate from Kenya Revenue Authority (KRA).The certificate should be valid as at the day of tender submission</li> <li>e) Filled Confidential Business Questionnaire Form (MUST be filled and signed by authorized signatory) – <i>Appendix</i></li> <li>f) Attach certified copy of the latest CR 12 issued by the Registrar of Companies.</li> <li>g) Attach copy of Valid Single Business Permit from County Government</li> <li>h) Anti-corruption declaration that the bidder will not engage in any corrupt or fraudulent practice - <i>Appendix</i></li> <li>i) Data Protection Compliance Certificate</li> </ol>	<p><b>9 Marks</b></p>
<p><b>2. SPECIFIC EXPERIENCE OF THE FIRM</b></p> <p>The firm must demonstrate experience in delivering an ERP solution to a Sacco similar in size to the Procuring Entity.</p> <ol style="list-style-type: none"> <li>a) Regulated DT Sacco with asset base of KES 4 billion and above (Attach award letter /contract.)</li> <li>b) Modules to be Implemented (at a minimum) <ul style="list-style-type: none"> <li>• Member onboarding &amp; customer service</li> <li>• FOSA banking &amp; teller operations</li> <li>• Loan/credit management</li> <li>• Finance &amp; accounting</li> <li>• Procurement</li> <li>• HR &amp; payroll</li> <li>• Risk management &amp; compliance</li> <li>• Business intelligence &amp; analytics</li> <li>• ICT security &amp; administration</li> <li>• Customize or develop additional functionalities specific to a DT-SACCO (e.g., share capital, dividend management).</li> </ul> </li> </ol>	<p><b>12 Marks</b></p>
<p><b>3. REFERENCE LETTERS FROM SUCCESSFUL IMPLEMENTATIONS</b></p>	

Evaluation Criteria	Total Points
<p>The firm should have at least five (5) reference sites where they have undertaken</p> <ul style="list-style-type: none"> <li>a) Similar assignment in the last five years (2019-2024). Bidders must attach copies of reference letters for each assignment.</li> </ul>	<b>5 Marks</b>
<p><b>4. MAINTENANCE AND SUPPORT CONTRACT</b></p> <p>The firm must demonstrate its track record in providing maintenance and support contract to its clients.</p> <ul style="list-style-type: none"> <li>a) Provide documentary evidence of the support at least five (5) contract such as an award letter for support and maintenance.</li> </ul>	<b>4 Marks</b>
<p><b>5. WORK PLAN AND METHODOLOGY</b></p> <p>The bidder should provide a logical, well-structured work plan consistent with the time frames and terms of reference. These will be based on:</p> <ul style="list-style-type: none"> <li>a) Understanding of the Procuring entity's TORs and Technical Requirements in the RFP. Attach responses to the Technical Requirements section of the RFP document. The bidder must be honest in this section</li> <li>b) Technical Approach and Methodology including proposed concept design of the System, including user requirements, development, quality assurance, user testing, and Project organogram</li> <li>c) Transfer of knowledge (detailed training plan and proposed schedule of activities.</li> <li>d) Overall Project Work plan (schedule of activities) and proposed timelines</li> <li>e) Risk Management framework to the project</li> <li>f) Change Management Plan for the project</li> <li>g) Comprehensive Data migration plan (schedule of activities and timelines)</li> <li>h) Quality Standards Certification</li> </ul>	<b>30 Marks</b>
<p><b>6. ORGANIZATION AND TEAM COMPOSITION</b></p> <p>The bidder should provide evidence of technical Training and Experience of their staff.</p> <ul style="list-style-type: none"> <li>a) The bidder should provide at least five (5) CVs of Key Technical staff who will be engaged in the assignment in the standard format.</li> <li>b) As evidence of relevant training, bidders should attach copies of professional and academic certificates of the Key Technical Staff in 6(a) above.</li> <li>c) Bidders should provide at least two (2) CVs of help desk and support personnel</li> </ul>	<b>10 Marks</b>
<b>TOTAL TECHNICAL EVALUATION SCORE</b>	<b>70 Marks</b>

6.1.3 Only bidders scoring above the minimum technical threshold will proceed for financial evaluation. The Procuring Entity reserves the right to determine this threshold.

## 6.2 Financial Evaluation

- 6.2.1 The tender evaluation Committee will determine whether the financial proposals are complete i.e. Whether the Bidder has costed all the items of the corresponding Technical Proposal and correct any computational errors.
- 6.2.2 The cost of any un-priced items shall be assumed to be included in other costs in the proposal.
- 6.2.3 In all cases, the total price of the Financial Proposal as submitted shall prevail.
- 6.2.4 The formulae for determining the Financial Score (Sf) shall be as follows: -

$$\mathbf{Sf = 30\% \times FL/FC}$$

*Where;*

**Sf** = the financial score,

**FL** = the lowest-priced financial proposal and

**FC** = the quote of the proposal under consideration.

- 6.2.5 Other considerations in financial evaluation shall include;
- i) Competitiveness of pricing structure (implementation, BREP, training, support).
  - ii) Total cost of ownership (TCO) over the project's life cycle (at least 10yrs).
  - iii) Payment terms and flexibility.

## 6.3 Total Tender Evaluation Score

- 6.3.1 Proposals will be ranked according to their combined **technical (St)** and **financial (Sf)** scores. The combined Total Evaluation Score, **TES**, is calculated as follows:

$$\mathbf{TES = St + Sf.}$$

*Where;*

**St** = the weighted Technical Proposal score of a bidder

**Sf** = The weighted Financial Proposal score of a bidder;

**TES = evaluated out a total possible score of 100%**

- 6.3.2 The firm achieving the highest combined technical and financial score will be invited for demos and presentations.

## SECTION 7: PROPOSAL FORMAT

### 7.1 Technical Proposal

- 7.1.1 The Technical proposal shall be submitted in the **Technical proposal Submission Form** (Form 1) in the appendices.
- 7.1.2 The Technical Proposal should cover broadly the following (use preferred formats in appendices where applicable);
- i) Company Profile
  - ii) Microsoft Partnership level or certification
  - iii) Relevant Experience in the **Bidder Experience Form** (Form 5)
  - iv) references from similar implementations
  - v) Solution Approach and Methodology
  - vi) Proposed Project Plan (phases, milestones, timeline, resources)
  - vii) Completed Technical Requirements Table (Complied/Not Complied/Remarks)
  - viii) Key Personnel (CVs, certifications, roles)
  - ix) SLA & Support Model
- 7.1.3 The details in 2.6.7 are complementary and simply provide the comprehensive guidelines of the expected technical proposal.

### 7.2 Financial Proposal

- 7.2.1 The Financial Proposal be submitted in the **Financial proposal Submission Form** (Form 2) in the appendices.
- 7.2.2 The Financial Proposal should cover broadly the following;
- x) Detailed Cost Breakdown (Licenses, Implementation, Training, etc.)
    - Licensing Fees (D365 BC)
    - Implementation / Customization Fees
    - Data Migration
    - Integrations (Banks, PSP, Credit Bureaus)
    - Training and Change Management
    - Annual Maintenance & Support
    - Hardware or Third-Party Software (if any)
  - xi) Proposed Payment Schedule
  - xii) List of Assumptions and Exclusions
  - xiii) Proposed Payment Terms
    - Milestone-based or phased approach (e.g., on design approval, UAT completion, go-live, etc.).
  - xiv) Validity period of the financial proposal
- 7.2.3 The details in 2.7.4 are complementary and simply provide the comprehensive guidelines of the expected technical proposal.
- 7.2.4 The Financial Proposal should be inclusive of all applicable taxes.



## SECTION 8: TIMELINES AND CONTACT

### 8.1 Proposed Activity Schedule

RFP Issuance Date:	25 <sup>th</sup> February, 2025
Last Date for Clarifications:	4 <sup>th</sup> March, 2025
Proposal Submission Deadline:	11 <sup>th</sup> March, 2025
Demos & Presentations Start Date:	17 <sup>th</sup> March, 2025
Evaluations & Site Visits Start Date:	24 <sup>th</sup> March, 2025
Expected Project Start Date:	7 <sup>th</sup> April, 2025

### 8.2 Contact Details

All communication and queries regarding this RFP should be made in writing to:

**The Chief Executive Officer.**  
**Nation DT Sacco Society Ltd**  
**10<sup>th</sup> Floor, IPS Building, Kimathi Street**  
**P.O Box 22022 – 00400**  
**Nairobi, KENYA**  
**Email: [tenders@nationsacco.com](mailto:tenders@nationsacco.com)**

**PROJECT MANAGER (PROJECT AUROR@)**  
**FOR: CEO, NATION DT SACCO**

## APPENDICES AND STANDARD FORMS

### FORM 1: TECHNICAL PROPOSAL SUBMISSION FORM

[Insert Date]

To: Chief Executive Officer,  
Nation DT Sacco Society  
P.O. Box 22022 – 00400  
Nairobi, Kenya.

Dear Sirs:

We, the undersigned, offer to provide the services for **SUPPLY, DESIGN, IMPLEMENTATION, TESTING, COMMISSIONING AND SUPPORT OF MICROSOFT DYNAMICS 365 BUSINESS CENTRAL (D365 BC)** in accordance with your **RFP No: NSS/01/FEB/2025**. We are hereby submitting our Proposal, which includes this Technical Proposal and a Financial Proposal sealed in a separate document.

We hereby declare that:

- a) All the information and statements made in this Proposal are true and we accept that any misinterpretation or misrepresentation contained in this Proposal may lead to our disqualification by the Procuring Entity.
- b) Our Proposal shall be valid and remain binding upon us for the period of time specified in ITB 2.9 of the RFP.
- c) We meet the eligibility and experience requirements as stated in 4.3 in the RFP.
- d) Our Proposal is binding upon us and subject to any modifications resulting from the Contract negotiations.
- e) We have no conflict of interest in accordance with ITB 2.11.2.
- f) We confirm that we are not insolvent, in receivership, bankrupt or on the process of being wound up.
- g) That in competing for and executing the contract, we shall undertake to observe the laws of Kenya against fraud and corruption including bribery, as well as against anti-competitive practices including bid-rigging.
- h) We commit to provide a performance security as per ITB 2.12 should we be successful.
- i) We, along with any of our sub-consultants are not subject to, and not controlled by any entity or individual that is subject to, a temporary suspension or a debarment imposed by the Kenyan laws/authorities to participate in this RFP process.
- j) Our Proposal is binding upon us and is only subject to any modifications resulting from the Contract negotiations.

- k) We understand that the Procuring Entity is not bound to accept any Proposal that it receives. We undertake, if our Proposal is accepted and the Contract is signed, to initiate the Services related to the assignment within one (1) week.

We remain,

Yours sincerely,

---

*[Authorized Signature]*

*[Insert Authorized Name]*

*[Insert Designation]*

*[Date]*

**FORM 2: FINANCIAL PROPOSAL SUBMISSION FORM**

**[Insert Date]**

To: Chief Executive Officer,  
Nation DT Sacco Society  
P.O. Box 22022 – 00400  
**Nairobi, Kenya.**

Dear Sirs:

We, the undersigned, offer to provide the services for **SUPPLY, DESIGN, IMPLEMENTATION, TESTING, COMMISSIONING AND SUPPORT OF MICROSOFT DYNAMICS 365 BUSINESS CENTRAL (D365 BC)** in accordance with your **RFP No: NSS/01/FEB/2025** and our Proposal.

Our attached Financial Proposal is for the amount of **KES \_\_\_\_\_ [Amount in Figures and Words]**, including of all taxes in accordance with 7.2.3 in the RFP. The estimated amount of local taxes is **KES \_\_\_\_\_ [Amount in Figures and Words]**.

Our Financial Proposal shall be valid and remain binding upon us, subject to the modifications resulting from Contract negotiations, for the period of time specified in ITB 2.9 in the RFP.

No commissions or gratuities have been or are to be paid by us to agents or any third party relating to this Proposal and Contract execution.

We understand you are not bound to accept any Proposal you receive.

We remain,

Yours sincerely,

\_\_\_\_\_  
*[Authorized Signature]*

*[Insert Authorized Name]*

*[Insert Designation]*

*[Date]*

**FORM 3: CONFIDENTIAL BUSINESS QUESTIONNAIRE FORM**

**a) BIDDER'S DETAILS**

	<b>ITEM</b>	<b>DESCRIPTION</b>
1	Name of the Procuring Entity	Nation DT Sacco Society Ltd
2	Name of the Bidder	
3	Full Address and Contact Details of the Bidder. a) Country b) City c) Location d) Building e) Floor f) Postal Address g) Name and email of contact person.	
4	Reference Number of the Tender	
5	Date and Time of Tender Opening	
6	Current Trade License No and Expiring date	
7	Maximum value of business which the tenderer handles.	

**b) GENERAL AND SPECIFIC DETAILS**

- i) Sole Proprietor, provide the following details.
  
- ii) Partnership, provide the following details.
  
- iii) Registered Company, provide the following details.
  - Private or public Company
  - State the nominal and issued capital of the Company -  
Nominal Kenya Shillings (Equivalent)  
Issued Kenya Shilling (Equivalent)
  - Give details of Directors as follows.

	<b>Names of Director</b>	<b>Nationality</b>	<b>Citizenship</b>	<b>% Shares owned</b>

**c) DISCLOSURE OF INTEREST-**

Interest of the Bidder in the Procuring Entity.

- i) Are there any person/persons in Nation DT Sacco Society Ltd who has an interest or relationship in this firm?

If yes, provide details as follows.

- 1.
- 2.
- 3.

- ii) Conflict of interest disclosure

	Type of Conflict	Disclosure YES OR NO	If YES provide details of the relationship with Procuring Entity
1	Bidder is directly or indirectly controlled by or is under common control with another bidder.		
2	Bidder receives or has received any direct or indirect subsidy from another bidder.		
3	Bidder has the same legal representative as another bidder		
4	Bidder has a relationship with another bidder, directly or through common third parties that puts it in a position to influence the tender of another bidder, or influence the decisions of the Procuring Entity regarding this tendering process.		
5	Any of the Bidder's affiliates participated as a consultant in the preparation of the design or technical specifications of the works that are the subject of the tender.		
6	Bidder would be providing goods, works, non-consulting services or consulting services during implementation of the contract specified in this RFP Document.		
7	Bidder has a close business or family relationship with a professional staff of the Procuring Entity who are directly or indirectly involved in the preparation of the Tender document or specifications of the Contract, and/or the Tender evaluation process of such contract.		

	Type of Conflict	Disclosure YES OR NO	If YES provide details of the relationship with Procuring Entity
8	Bidder has a close business or family relationship with a professional staff of the Procuring Entity who would be involved in the implementation or supervision of the Contract.		
9	Has the conflict stemming from such relationship stated in item 7 and 8 above been resolved in a manner acceptable to the Procuring Entity throughout the tendering process and execution of the Contract?		

**d) CERTIFICATION**

On behalf of the Bidder, I certify that the information given above is correct.

---

*[Authorized Signature]*

*[Insert Authorized Name]*

*[Insert Designation]*

*[Date]*

**FORM 4: ANTI-CORRUPTION DECLARATION FORM**

I \_\_\_\_\_ [*Authorized Officer Name*] of Post Office Box \_\_\_\_\_ [*Insert postal address*] being a resident of \_\_\_\_\_ [*Insert City/town*] in the Republic of \_\_\_\_\_ [*Country*] do hereby make a statement as follows:-

1. THAT I am the \_\_\_\_\_ [*Insert designation of Authorized Officer*] of \_\_\_\_\_ [*Insert Company Name*] who is a Bidder in respect of **RFP No: NSS/01/FEB/2025**, for the **SUPPLY, DESIGN, IMPLEMENTATION, TESTING, COMMISSIONING AND SUPPORT OF MICROSOFT DYNAMICS 365 BUSINESS CENTRAL (D365 BC)** for Nation DT Sacco Society and duly authorized and competent to make this statement.
2. THAT I declare that I recognize that this Procurement is based on a free, fair and competitive tendering process which should not be open to abuse.
3. THAT I declare that I will not offer or facilitate, directly or indirectly, any inducement or reward to any Procuring Entity officer, their relations or business associates, in connection with this RFP for or in the subsequent performance of the contract if we are successful.
4. THAT I will not engage/has not engaged in any corrosive practice with other bidders participating in this RFP.
5. THAT what is deponed to herein above is true to the best of my knowledge, information and belief.

\_\_\_\_\_  
[*Authorized Signature*]

[*Insert Authorized Name*]

[*Insert Designation*]

[*Date*]



## FORM 5: BIDDER EXPERIENCE FORM

<b>Assignment Name:</b>		<b>Location</b> ( <i>County/City/Town</i> ):	
<b>Name of Client:</b>		<b>Physical Address:</b>	
<b>Clients contact person for the assignment:</b> Name: Designation: Email: Phone:		<b>Duration of assignment:</b> From: To:	
<b>Description of Project Scope:</b>			
<b>Description of Actual services provided</b> ( <i>e.g. Modules, etc.</i> ):			
<b>Software and Version deployed:</b>			
<b>Unique Value Proposition</b> ( <i>Innovative solution/idea in the project</i> ):			
<b>Any other Useful Information of the Project:</b>			