



Institute of Actuaries of India

Unit no. F-206, 2nd Floor, "F" Wing in Tower 2, Seawoods Grand Central, Plot no R-1,
Sector 40, Seawoods, Near Seawoods Railway Station, Navi Mumbai – 400706
☎ + 91 22 39686060 📠 + 91 22 39686050

“Revamping, Re-designing and Maintenance of Institute of Actuaries of India website”

REF. NO.: IAIIIT-Mar-2018

Institute of Actuaries of India

(Set up by an act of Parliament)

Unit no. F-206, 2nd Floor, 'F' Wing in Tower 2,
Seawoods Grand Central, Plot no R-1,
Sector 40, Seawoods,
Near Seawoods Railway Station,
Navi Mumbai - 400 706

Boardline: +91 - 22 - 39686060

Fax: +91-22 – 39686050



Institute of Actuaries of India

Unit no. F-206, 2nd Floor, "F" Wing in Tower 2, Seawoods Grand Central, Plot no R-1,
Sector 40, Seawoods, Near Seawoods Railway Station, Navi Mumbai – 400706
☎ + 91 22 39686060 📠 + 91 22 39686050

Important Dates & Information:-

Date of commencement of issue of RFP	26.03.2018
Date and Venue of Pre-Bid Meeting	31.03.2018 by 11:00 am @ above address
Last date for receipt of queries on RFP	03.04.2018 by 03:00 pm
Uploading of clarifications/ reply to Pre-bid queries on the IAI Website.	04.04.2018 by 03:00 pm
Last date for Bid Submission of RFP	06.04.2018 by 03:00 pm
Address for submission of Bids	INSTITUTE OF ACTUARIES OF INDIA Unit no. F-206, 2nd Floor, 'F' Wing in Tower 2, Seawoods Grand Central, Plot no R-1, Sector 40, Seawoods, Near Seawoods Railway Station, Navi Mumbai - 400 706
Date and Venue of opening of Technical Bids	07.04.2018 by 03:00 pm @ above address
Fees for RFP document (non-refundable)	Rs. 500/- in the form of Demand Draft in favor of Institute of Actuaries of India, payable at Mumbai.
Contact Person for queries	Mr. Larry Barretto (Manager IT and Member Services) Phone: +91 22 39686060 / 8879594030 E-Mail: it@actuariesindia.org

A. About Institute

IAI is a statutory body established under The Actuaries Act 2006 (35 of 2006) for regulation of profession of Actuaries in India. The provisions of the said Act have come into force from 10th day of November 2006, in terms of the notification dated 8th November 2006, issued by the Government of India in the Ministry of Finance, Department of Economic Affairs. As a consequence of this, the erstwhile Actuarial Society of India was dissolved and all the Assets and Liabilities of the Actuarial Society of India were transferred to, and vested in, the Institute of Actuaries of India constituted under Section 3 of the Actuaries Act, 2006.

B. Objective of the Project

1. Institute of Actuaries of India (IAI) intends to revamp and redesign IAI website into a dynamic website at par with other progressive Institutions for a speedy and effective means for dissemination of information, interaction with actuarial education sector utilities and for delivery of services to members. The website is to be given complete new look & feel which should be more attractive and user friendly with new enhanced features.
2. Institute of Actuaries of India (IAI) intends to issue this bid document, hereinafter called tender, to eligible Software development and Designing Agency in India, hereafter called as "Bidders or Vendors", to participate in the competitive bidding for Revamping, Re-designing and Maintenance of



Institute of Actuaries of India website as defined in scope of work. The IAI, for this purpose, invites proposal from Bidders. The tender document is now being issued to enable vendors to submit their responses to the IAI.

3. IAI will not accept any deviations from the terms and conditions specified in the tender. Deviations will result in disqualification of the offer made by the vendor at the discretion of the IAI.

C. Website Goals

IAI intends to utilize the web site to meet several objectives, as reflected in the following list of support facilities:

- To develop the website as a resource site for information and access to other relevant information and fully integrate web site with IAI's business and strategic objectives.
- To improve IAI's web site look & feel.
- Provide up to date information on all announcements, registrations, events etc.
- Provide member feedback forms, enquiry forms etc.
- Maintained with ease so that only up-to-date information is available at any point in time.
- To analyse the usage pattern and improve the contents constantly.
- The system should be compatible and user friendly to be accessible on mobile devices.

D. Schedule of Events

IAI expects to adhere to the tentative schedule shown below. It should be noted, however, that some dates are approximate and final dates are subject to mutual agreement. It is the intention of IAI to move the process as quickly as possible.

E. Minimum Eligibility Criteria

The bidder interested in being considered for this assignment must fulfil the following criteria:

- The bidder shall be a company incorporated, registered under the Indian Companies Act, 1956. The bidder may also be Proprietorship firm / Partnership firm / LLP. Subcontracting after award of RFP is not allowed.
- The bidder should have registered office in India.
- Bidder should have valid Sales Tax/VAT/GST/Service Tax registration number and income tax registration number (PAN).
- The bidder should have minimum five year experience in website and mobile designing and development. Bidder must have implemented applications/websites using ASP.Net technology framework and architecture.
- Bidder must have developed, installed, tested and commissioned at-least Three (3) similar CMD driven web-sites & mobile app. This must be supported by a copy of client letters.



- Minimum Average Annual Turnover of the last three years. i.e. FY 2014-15, 2015-16 and 2016-17 of the bidder should minimum be 1 crore.
- The bidder should have organizational capability related to IT Software Development and Designing (a dedicated team of more than 20 professionals in India with specialization in carrying out above services).
- The bidder must assign a fixed dedicated team of resources for the project activity.
- The firm should submit Non-Disclosure Agreement.
- The bidder should not have been black listed by any of Government Authority or Public Sector Undertaking (PSUs). The bidder shall give an undertaking (on their letter head) that they have not been black listed by any of the Govt. Authority or PSUs.

Bidder should submit proof in support of above mentioned criteria while submitting the proposal. Vendors who do not fulfill the above criteria or who fail to submit proof will be rejected

F. Scope of Work

The current scope of work is given in annexure 1.

G. Duration of Project

The entire project should be completed within **3 months** from the date of letter of appointment.

H. Fee for the Assignment

A Lump sum fee has to be quoted by the bidder for the complete assignment. Fees should be inclusive of all expenses and exclusive of all applicable taxes. A detailed cost estimation of man hours, timelines and software licenses to be used to be prepared and submitted for this project activity.

I. Bank Guarantee

The selected bidder shall be required to furnish a Bank Guarantee equivalent to 10% of the contract value rounded off to the nearest thousand Indian Rupees in the form of an unconditional and irrevocable bank guarantee from a scheduled commercial bank in India in favour of Institute of Actuaries of India payable at Mumbai for the period of contract with 90 days claim period beyond the completion of all contractual obligations. The bank guarantee must be submitted after award of contract. The successful bidder has to renew the bank guarantee on same terms and conditions for the period up to contract including extension period, if any. Bank Guarantee would be returned only after successful completion of tasks assigned to them and only after adjusting/recovering any dues recoverable/payable from/by the bidder on any account under the contract.

J. Instructions to the Bidders

i. Procedure for Submission of the Proposal:-



The bidder should submit their Proposal in two separate envelopes marked as ENVELOPE-A and ENVELOPE-B.

ENVELOPE-A should contain all the information as mentioned below in point no. xiii. On page no. 8

ENVELOPE-B should contain the price bid mentioned below "Form 9: Financial Proposal" for providing the services as per scope of work.

Each document in the two envelopes of Proposal should be a complete document and should be bound as a volume separately. Each of the document should be page numbered and appropriately flagged and contain the list of contents with page numbers. Different copies must be bound separately. The deficiency in documentation may result in the rejection of the Proposal.

The soft copy of the Proposal should be submitted, in the form of a non-rewriteable USB separate for each document and placed in appropriate envelope. The USB must be duly signed by the bidder using a "Permanent Pen/Marker" and should bear the name of the bidder.

The sealed covers should be super scribed with the wordings "Request for Proposal (RFP) for Revamping, Re-designing and Maintenance of Institute of Actuaries of India website."

The sealed cover should also indicate clearly the name, address and telephone number of bidder to enable the proposal to be returned unopened in case it is declared "Late".

Bidder must ensure that the information furnished by him/her in respective CDs is identical to that submitted by him/her in the original paper document. In case of any discrepancy observed in the contents of the CDs and original paper documents, the information furnished on original paper document will prevail over the soft copy.

ii. Cost of Proposal:-

Bidder shall bear all costs associated with the preparation and submission of its Proposal, including cost of presentation for the purposes of clarification of the Proposal, if so desired by the Purchaser. Institute will in no case be responsible or liable for those costs, regardless of the conduct or outcome of the tendering process.

iii. Contents of the Proposal:-

Bidder is expected to examine all instructions, forms, terms & conditions and Statement of Work in the Proposal. Failure to furnish all information required or submission of a Proposal not substantially responsive to the Proposal in every respect will be at the risk and may result in the rejection of the application.

iv. Conflict of Interest:-



Bidder should not have any conflict of interest with the work that is needed to be undertaken.

v. Language of Proposal:-

The Proposals prepared by the bidder and all correspondence and documents relating to the proposal exchanged by the bidder and Institute, shall be written in the English language, provided that any printed literature furnished bidder may be written in another language so long the same is accompanied by an English translation in which case, for purposes of interpretation of the Proposal, the English translation shall govern.

vi. Confidentiality:-

1. The bidder will be exposed by virtue of the contracted activities to internal business information of Institute. The bidder would be required to provide an undertaking (Non-disclosure Agreement) that they will not use or pass to anybody the data/information derived from the assignment in any form. The bidder must safe guard the confidentiality of the Institutes business information, applications and data.

2. Disclosure of any part of the above mentioned information to parties not directly involved in providing the services requested, unless required to do so by the Court of Law or other Statutory Authorities, could result in pre mature termination of the contract. The Institute may initiate legal action against the bidder for breach of trust.

vii. Disclaimer:-

Institute and/or its officers, employees disclaim all liability from any loss or damage, whether foreseeable or not, suffered by any person acting on or refraining from acting because of any information including statements, information, forecasts, estimates or projections contained in this document or conduct ancillary to it whether or not the loss or damage arises in connection with any omission, negligence, default, lack of care or misrepresentation on the part of Institute and/or any of its officers, employees.

viii. Authorized Signatory for Bidder:-

The "Bidder as used in the Proposal shall mean the one who has signed the Bid document forms. The authorized signatory should be the duly Authorized Representative of the Bidder, for which a certificate of authority will be submitted. All certificates and documents (including any clarifications sought and any subsequent correspondences) received hereby, shall, as far as possible, be furnished and signed by the Authorized Representative.

The power or authorization, or any other document consisting of adequate proof of the ability of the signatory to bind the agency shall be annexed to the Proposal. Institute may reject outright any Proposal not supported by adequate proof of the signatory's authority.

ix. Contact details of the Bidder:-

Bidder who wants to receive Institute's response to queries should give their contact details to Institute. The Bidder should send their contact details in writing at the Institute's contact address indicated in Page 1 of this document.

x. Queries on the RFP:-

Bidder requiring any clarification on this document may send a query in writing at the Institute's contact address indicated in Page 1 of this document. Institute's response (including an explanation of the query but without identifying the source of inquiry) to all the queries, received not later than the dates prescribed by the Institute, will be made available on the IAI website and sent to all bidders who have given their contact details. Institute may also hold a pre-bid meeting if needed to give clarifications and invitation of the same will be sent to the bidders who have given their contact details.

xi. Amendment of RFP:-

At any time prior to the last date for receipt of Proposals, Institute, may, for any reason, whether at its own initiative or in response to a clarification requested by a prospective bidder, modify the RFP by an amendment. In order to provide prospective bidder reasonable time in which to take the amendment into account in preparing their Proposals, Institute may, at its discretion, extend the last date for the receipt of Proposals and/or make other changes in the requirements set out in the Invitation for Proposals.

xii. Bid Processing Fees:-

All Proposals must be accompanied by a bid processing fee of INR 500/- (INR Five Hundred only) in the form of a crossed demand draft drawn on any nationalized/ scheduled bank payable at par in Mumbai, in favour of "Institute of Actuaries of India". The RFP document can be downloaded from the website - www.actuariesindia.org

K. Selection Process

i. Technical Evaluation

The number of points to be given under each of the evaluation criteria is:

CATEGORY	MAX. POINTS
MANDATORY REQUIREMENTS (PASS OR FAIL)	Pass/Fail
1. OVERALL RESPONSE *Understanding of, and responsiveness to, IAI requirements; *Understanding of scope, objectives and completeness of response; *Overall concord between IAI requirements and the proposal.	(20)

<p>2. METHODOLOGY</p> <p>*Quality of the proposed approach, methodology and system design; *Quality of proposed implementation plan, i.e how the bidder will undertake each task, and time-schedules;</p> <p>*Risk assessment - recognition of the risks/peripheral problems and methods to prevent and manage risks/peripheral problems.</p>	<p>(30)</p>
<p>3. TECHNICAL EXPERTISE</p> <ul style="list-style-type: none"> * Certifications * Experience in successfully delivering similar Projects. * Experience in executing Web Applications 	<p>(30)</p>
<p>4. PROPOSED TEAM and ORGANISATIONAL CAPACITY</p> <ul style="list-style-type: none"> * Team leader: Relevant experience, qualifications, and position with firm; * Team members - Relevant experience, skills & competencies; * Organization of the team and roles & responsibilities; * Professional expertise, knowledge and experience with similar projects, contracts, clients and consulting assignments; 	<p>(20)</p>
<p>TOTAL MARKS</p>	<p>100</p>

The bidder should take enough care to submit all the information sought by the Authority in the desired formats. The Proposals are liable to be rejected if information is not provided in the desired formats. The Technical Proposals will be evaluated out of 100 marks.

The Technical Proposals, which are found acceptable in accordance with point (i) above, shall be deemed as responsive proposals. The bidder with such responsive proposals and securing score of minimum 60 marks would be considered as Technically Qualified bidders and would be eligible for next stage of the Bidding Process i.e. Financial Evaluation. "Financial Proposal" of only Technically Qualified bidders will be evaluated by appropriate authority.

ii. Selection criteria

The final selection of the bidder will be from all the bidders who scored more than 60 marks in technical evaluation. A contract will be awarded to the responsible bidder whose proposal is determined to be the most advantageous to IAI, taking into consideration the best overall combination of experience, technical merit, and price.

ii. Terms of Payment

1. The Payment Terms shall be as follows and subject to the deliverables.
2. Payment will be made in Indian currency i.e Indian Rupee.
3. Bidders have to make their own arrangement for their travel and stay at the above said locations during the assessment at their own cost.

#	Slab	Description
1.	35%	30% of the project value after successful GOLIVE of Phase 1.
2.	40%	Further 40% after successful GOLIVE of Phase 2.
3.	25%	Balance 25% after successful completion of project as per scope of work and handover of source code, manuals, users training etc.

iv. Penalty Clause

If delay in completing any of the above written deliverable is more than one month a show cause notice may be served to the bidder. However, if there is a delay of more than 3 months in completion of the whole project then a penalty of 5% shall be imposed on complete cost raised by the bidder with regard to this project.

v. Termination for Default

1. The Institute, without prejudice to any other remedy for breach of Contract, by written notice of default sent to the Bidder, may terminate this Contract in whole or in part, if the Bidder fails to perform any obligations(s) under the Contract.
2. In the event of the Institute terminating the Contract in whole or in part, the Institute may procure, upon such terms and in such manner, as it deems appropriate, services similar to those undelivered, and the Bidder shall be liable to the Institute for any excess costs for such similar services

vi. Force Majeure

The Bidder or the Institute is not responsible for delays or non-performance of any contractual obligations arising out of blockade caused by war, revolutions, insurrection, civil commotion, riots, mobilizations, strikes, acts of God, plague or other epidemics, fire, flood, obstructions of navigation by ice of port of dispatch, acts of Govt. or public enemy or any other event beyond the control of either party which directly, materially and adversely affect the performance of any contractual obligation.



vii. Compliance with Laws

The Bidder shall observe, adhere to, abide by, comply with and notify the Institute about all laws in force or as are or as made applicable in future, pertaining to or applicable to them, their business, their employees or their obligations towards them and all purposes of this RFP and shall indemnify, keep indemnified, hold harmless, defend and protect the Institute and its employees/officers/staff/personnel/representatives from any

failure or omission on its part to do so and against all claims or demands of liability and all consequences that may occur or arise for any default or failure on its part to conform or comply with the above and all other statutory obligations arising there from.

viii. Assignment & Subcontract

The bidder shall not assign, in whole or in part, its obligations to perform under the contract, except with the Institutes prior written consent.

In case of subcontracting permitted, the contracting vendor is responsible for all the services provided to the Institute regardless of which entity is conducting the operations. The contracting vendor is also responsible for ensuring that the sub-contractor comply with all security requirements of the contract and Institute can obtain independent audit report for the same.

ix. Tender / RFP Cancellation:

The Institute reserves the right to cancel the Tender/RFP at any time without assigning any reasons whatsoever.

x. Use of IAI Logo

Policy of use of IAI Logo “The IAI logo and the name are registered trademarks of the Institute of Actuaries of India and restricted for use with IAI publicity, correspondence and documents. The logo may be used under special circumstances as decided by the Council. Use of the logo the name and the acronym by any individual (be a member of the Indian Actuarial Profession or otherwise) or any organization shall not be without the written permission from the person authorized by the Council”

L. Forms for the Proposal

Proposal is to be submitted in the below mentioned format(s) along with the necessary documents as listed. Proposal should provide information against each of the applicable requirements. In absence of the same, the Proposal shall be liable for rejection.

The forms are given in annexure 2.



Annexure 1

Scope of Work

IAI shall not provide any tools that may be required by the successful bidder for conducting the activity.

IAI will not make any additional payment for usage of tools proposed by the successful bidder.

IAI will award the contract to the successful Bidder and the bidder should deliver the service with the following scope:

Detailed Scope of Work & Deliverables:

IAI shall not provide any tools that may be required by the vendor for conducting the project requirements.

IAI will not make any additional payment for usage of tools by the vendor for the project.

The vendor shall provide a proposal, in accordance with the terms and conditions set forth herein, to provide website design, development and ongoing maintenance services to the Commerce Corporation that may include, but are not limited to:

- Development of a project plan, including timeline for the entire scope of work and resource allocation.
- Development of strategic plan for organizing content around experiences that inspire, inform and drive action. This includes development of personas for target audience segments and use these personas to further define site experiences and desired content.
- Redesign of www.actuariesindia.org to create a delightful and uncomplicated experience that includes (but is not limited to) the following features, elements and functionality:
- Vendor has to provide 3-4 design templates to IAI for the finalization. Vendor will provide samples of the concept designs of homepage and at least two templates of inner web pages to the IAI for evaluation purpose. Vendor will also provide samples of the content (for e.g. landing pages (s) of the website).
- Necessary web services & API's for the project, if any.
- Necessary code and database table enhancements and tweaking to improve performance of the application.
- Project will include 1 year Warranty Maintenance Support which will start after successful completion of the scope of work as defined in the RFP.



o Intuitive and Attractive Design

1. Clean, contemporary design and flow.
2. Easy and intuitive navigation that does not require multiple clicks to reach a desired page.
3. Easily manage and manipulate the layout and content to make frequent changes on the homepage.
4. The website will be highly user friendly and compatible with latest technologies and latest browsers. (Chrome, Safari, Opera, Firefox, Internet Explorer)
5. Mobile responsive web design – compatible with multiple different screen sizes and mobile devices (Apple, Androids, tablets, etc.)
6. Balance between simplicity and relevant information.
7. Support high-resolution media (images and video) - Consistent use of Rhode Island's brand style guide
8. Consumer experience-led user interface that groups and presents information in a logical manner and requires no more than three levels of "scrolling" for the user to find desired information
9. Fast-loading pages designed with a balance of text and graphics such that each page loads in 4 seconds or less on the average computer.

o Content Management Strategy

1. A content management system that is instinctive, easy to use, supports the features and functionality and can be updated easily by the internal website administrator.
2. Admin Portal that allows admin to easily create, publish/unpublished and delete content
3. CMS should be secured and protected.

o Social Media Link - Facebook, Twitter, YouTube, LinkedIn.

o Other key requirements and considerations include:

- Image rich with use of captivating photos and videos
- Can display changing photographs and video content on the homepage and other landing pages.
- Has functionality to support slideshows and carousels.
- Displays correctly in all major browsers
- Displays time-sensitive, accessible information (e.g., Top 10 experiences, partner deals) on the home page and other landing pages.
- The website and its element will be SEO friendly.
- Utilizes best-in-class search functionality.
- Features a detailed website sitemap.
- Analytics and monitoring Google Analytics.
- Website must be completely secure and against intrusion using HTTPS.
- Design and CMS must allow for easy changes to site navigation, images, listings and overall content.
- Migrate existing content, images etc.
- Complete all other work necessary to develop and fully test the website.
- Ensure website is fully operational.
- Conduct user testing prior to launch.
- Training: Provide CMS training to IAI team.
- Enhancement and Tweaking of Member Tracking System (MTS) and SQL Database as and when required.



Technology Used

Website Front End – HTML5, AngularJS_v4.0+, ASP.NET 5.0+ MVC Framework, CSS3, JavaScript

Database – MSSQL Server 2008

Web Development Standards

The web site should be developed with the latest technology, using up-to-date and well established development tools and software. The development approach should conform to the best practices in the web site development and maintenance industry.

Generally it should ensure the following:

- Adherence to commonly accepted standards and practices, including W3C compliance.
- Using latest web website design technologies
- Acceptability on all current user technology platforms; browsers, operating systems, client systems

IAI website – Sitemap

Phase 1 – Pre Login (Approx 100 pages)

Sitemap

Home (Dynamic)

- Image Scroller (New System)
- Category wise Announcements (DB already There)
- Event Calendar (DB already There)
- Examination - Static
- Upcoming Seminars/events (DB Already There)
- Download Magazine - Static
- Membership Stats - Static

Becoming an Actuary

- What is an Actuary? - Static
- What does an Actuary do? - Static
- Who can become an Actuary? - Static
- Meet some of our members – Static

Governance

- Acts and Regulations - Static
- The Council - Static
- Committees - Sec 21 - Static
 - External Affairs and Research Committee



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- Professionalism Committee
- Audit Committee
- Finance and Admin Committee
- Education Committee
- Wider Fields Committee
- Acts and Regulations review Committee
- Committees - Sec 26 - Static
- Quality Review Board - Sec 43 - Static
- Advisory Groups - Static
- IRDA - Static
- Right to Information Act - Static
- Strategy Initiative Project - Static
- IAI Logo – Static

ACET

- ACET - Static
 - Registration Form – Dynamic
 - ACET Login - Dynamic
 - Download
 - My Profile
 - Transaction Details
 - Change Centre
 - Change Password
- ACET Background - Static
- Important Dates - Static
- Syllabus - Static
- List of Test Centers - Static
- Frequently Asked Questions - Static

Student

- Admissions – Static
 - Admission Form Module – Dynamic
- Membership - Static
 - Types of Membership
 - Membership Statistics
- Study Material - Static
 - Online Procedure
 - Price List
 - Revision Material
 - Notice
 - General Info
- Student Support Scheme - Static
- Prizes for Exam Performance - Static
- Recognition of Actuarial course by Association of Indian Universities (AIU) for Phd -purpose - Static



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Examination

- Exams Explained - Static
 - Regular Exams
 - CT9
 - CA2
 - CA3
- Fees - Static
- Syllabus - Static
- Regular Exam Results - Static
 - Current Diet
 - Previous Diets
- Practical Exam Results - Static
 - CT9
 - CA2
 - CA3

- Question Papers & Solutions - Static
 - Diet Wise
 - Subject Wise
 - ACET Diet Wise

- Appeals - Static
 - Invitation to Donate–Prize Money
- CERA - Static
- Exemptions - Static
- Verification - Static

Seminars

- Upcoming Seminars within India – Dynamic
 - Seminar Registration Form – Dynamic
 - Accommodation Details – Static
- Past Seminars within India - Dynamic
- Global Conference of Actuaries - Static
- Seminar FAQs - Static
- Speaking Opportunities – Static

Research and Publication

- Research - Static
 - Why Research
 - Strategy
 - Vision, Mission and Framework
 - Projects
 - Guidelines
 - Current
 - Completed
 - References
 - Newsletters
 - Useful Links



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▪ Contact us

- Library Services - Static
- Actuary India - Static
- Mortality Table - Static
- Online Resources – Static

Professionalism - Static

- Professional Code of Conduct
- Actuarial Practice Standards
- Guidance Notes
- APSs/GNs Under Due Process

Employment Portal - Dynamic

- Login
- Company Details
- Advance Search
- Profile Page
- Feedback

Downloads – Static

Careers

- Actuarial Employers in India - Static
- Career Opportunities for Actuaries - Static
- Current Openings in IAI – Static

Volunteering Opportunities – Static

Contact Us – Static

Social Media Links – Static

Login Page

Search - Dynamic

Footer Links

- Disclaimer - Static
- Privacy Policy - Static
- Sitemap - Static
- Vision & Mission - Static
- IAI Logo - Static
- About Us – Static
- Terms of Use – Static



Phase 2 – Post Login (Dynamic, payment gateway) – Approx 30 pages

Sitemap

- My Profile
- Dashboard - (New System)
- Study Material
- Downloads
- Transaction List
- Change Password
- Seminar
- CPD Hours
- Examination
 - Exam Pass History
 - Performance Report
 - Paper Setting & Evaluation
 - Exam Result
 - Release/ Verification Registration Form
 - Release/ Verification View Documents
 - Hall ticket
 - Exam Registration Form
- Class Room Coaching
- Employment Portal
 - Profile
 - Graduation
 - Post Graduation
 - Work Experience
 - Resume Upload
- Educational Support
 - Registration Form
 - Videos
- Member List
- Survey Form



Annexure 2

Proforma and Annexures

Form 1: Letter Proforma

To
Executive Director
Institute of Actuaries of India
Unit no. F-206, 2nd Floor, 'F' Wing in Tower 2,
Seawoods Grand Central, Plot no R-1,
Sector 40, Seawoods,
Near Seawoods Railway Station,
Navi Mumbai - 400 706

Sir,

Sub: **Revamping, Re-designing and Maintenance of Institute of Actuaries of India website.**

The undersigned Vendor, having read and examined in detail the scope of for the said assignment, do hereby express their interest to provide their Services as specified in the scope of work.

Correspondence Details

1	Name of the Agency	
2	Address of the Agency	
3	Name of the contact person to whom all references shall be made regarding this tender	
4	Designation of the person to whom all references shall be made regarding this tender	
5	Address of the person to whom all references shall be made regarding this tender	
6	Telephone (with STD code)	
7	E-Mail of the contact person	
8	Fax No. (with STD code)	



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Document forming part of Proposal

We have enclosed the following:

Form 2 : Minimum Eligibility

Form 3 : Prior Experience (Project completion certificates conforming the experience to be attached as relevant and work-orders)

Form 4 : Comments and Suggestions

Form 5 : Approach for the Project

Form 6: CVs of the proposed team members

Form 7 : Declaration Letter

Form 8 : Work plan

Bid processing fee of INR 500/- (INR Five Hundred only).

Registered Power of Attorney executed by the Bidder in favor of the Principal Officer or the duly Authorized Representative, certifying him/her as an authorized signatory for the purpose of this RFP.

We hereby declare that our Proposal is made in good faith and the information contained is true and correct to the best of our knowledge and belief.

Thanking you,

Yours faithfully,

(Signature of the Officer)

Seal:

Name:

Designation:

Date:

Place:

Business Address:

Witness:

Signature

Name

Address

Date

Bidder:

Signature

Name

Designation

Company

Date



Institute of Actuaries of India

Unit no. F-206, 2nd Floor, "F" Wing in Tower 2, Seawoods Grand Central, Plot no R-1,

Sector 40, Seawoods, Near Seawoods Railway Station, Navi Mumbai – 400706

+ 91 22 39686060 + 91 22 39686050

Form 2 : Company Information

[Bidder should not include the figures of the subcontractors]

1.1	Name of Agency			
1.2	Year of Registration/ Incorporation			
1.3	Year of Registration/ Incorporation in India*			
1.4	Number of Employees in India as on March 31, 2018			
		FY 2014-15	FY 2015-16	FY 2016-17
1.5	Net Worth (INR)**			
1.6	Annual Turnover(INR)**			
1.7	Annual Profits (INR)**			

*Enclose a copy of Registration document (including registration certificate)

**Enclose a copy of Audited Financial Statement with respect to information furnished in 1.5.

Witness:
Signature
Name
Address
Date

Vendor:
Signature
Name
Designation
Company
Date



Form 3 : Prior Experience

[Using the format below, provide information on each assignment for which your Organization, and each associate for this assignment, was legally contracted either individually as a corporate entity or as one of the major companies within an association, for carrying out services similar to the ones requested under this assignment. Vendor should give information on the similar areas of design as indicated. Prior Experience in projects]

Name of project:	
Objectives of the Project:	
Nature of project:	
Description of project:	
Country:	
Location within country:	
Duration of the Fund:	
Name of associated staff, if any:	
Name of senior professional staff of your firm involved and functions performed.	
Description of actual Assignment/job provided by your staff within the Assignment/job:	

Note : Please attach Letter of Intent or work Order or certificate of successful completion for each project, from the respective Client(s).

Witness:
Signature
Name
Address
Date

Vendor:
Signature
Name
Designation
Company
Date

Form 4 : Comments and Suggestions

[Suggest and justify here any modifications or improvement to the scope of work, tasks to be performed, timeline, deliverables, payment terms etc. to improve performance in carrying out the Assignment. Vendor can suggest deleting some activity or adding another, or proposing a different phasing of the activities. Such suggestions should be concise and to the point.]

(Maximum two pages)

Form 5 : Approach & Methodology for assignment

[Explain your understanding of the objectives of the assignment/job, approach to the assignment/job, detailed execution plan for the assignment, methodology for carrying out the activities, tools to be used and obtaining the expected output, and the degree of detail of such output.]



Form 6: CVs of Proposed Team

[Provide CVs of the proposed team for undertaking the current assignment, especially of the Proposed Head of the Agency. The CVs to be included in the following format:]

NAME:

1. Proposed Position:
2. Name of Firm:
3. Name of Staff:
4. Date of Birth:
5. Nationality:
6. Education:

Name of Degree	Year	Name of Institution

7. Membership of Professional Associations:
8. Other Training:
9. Countries of Work Experience:
10. Languages:

Language	Speak	Read	Write

11. Employment Record:

Firm	From – To Date	Designation / Role

12. Detailed Tasks Assigned	Work Undertaken that Best Illustrates Capability to Handle the Tasks Assigned

13. Certification:

I, the undersigned, certify that to the best of my knowledge and belief, this CV correctly describes me, my qualifications, and my experience. I understand that any wilful misstatement described herein may lead to my disqualification or dismissal, if engaged.

Date: _____

[Signature of staff member or authorized representative of the staff]

Day/Month/Year: _____

Full name of authorized representative:



Institute of Actuaries of India

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Form 7: Declaration Letter

Declaration Letter on official letter head stating the following:

We are not involved in any major litigation that may have an impact of affecting or compromising the delivery of services as required under this contract. We are not black-listed by any Central / State Government / Public Sector Undertaking in India.

Witness:
Signature
Name
Address

Date

Vendor:
Signature
Name
Designation
Company
Date

Form 8: Work plan (with timelines)

Kindly submit your timelines for this activity as per the scope of work mentioned in the document. The proposal should include project schedule, work breakdown structure which includes timelines, key milestones, weekly meeting schedules and other project details.



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Form 9: Financial Proposal

To,

Executive Director

Institute of Actuaries of India
Unit no. F-206, 2nd Floor, 'F' Wing in Tower 2,
Seawoods Grand Central, Plot no R-1,
Sector 40, Seawoods,
Near Seawoods Railway Station,
Navi Mumbai - 400 706

Sub: **Revamping, Re-designing and Maintenance of Institute of Actuaries of India website.**

Sir/ Ma'am,

In response to the above mentioned subject, hereunder is our financial cost for the project:

I/we _____ Vendor services firm herewith enclose Financial Offer of Rs. _____ (in words) for selection of my/our firm as Vendor. The break-up of the above cost is given as below.

S.N	Cost parameter	Details	Cost (Rs)

(Kindly provide details breakup of cost components)

Above mentioned cost include all logistics and no other extra charges are applicable except taxes, which is extra as applicable by Government of India. We hereby declare that our Proposal is made in good faith and the information contained is true and correct to the best of our knowledge and belief.

Thanking you,
Yours faithfully

(Signature of the Officer)

Seal:

Name:
Designation:
Date:
Place:
Business Address: