



KENYA VISION 2030 DELIVERY SECRETARIAT

**STANDARD TENDER DOCUMENT
FOR PROCUREMENT OF GROUP LIFE
INSURANCE**

TENDER No. VDS/06/2019-2020

CLOSING ON:

THURSDAY 13TH FEBRUARY 2020 AT 11.00AM

SECTION I - INVITATION TO TENDER

Date 29th January 2020

TENDER REF. NO. VDS/06/2019-2020

TENDER NAME Provision of Staff Group Life Insurance Cover

- 1.1 The Kenya Vision 2030 Delivery Secretariat (VDS) invites sealed tenders from eligible candidates for provision of staff group life insurance cover.
- 1.2 Interested eligible candidates may obtain further information from and inspect the tender documents at **Procurement Offices, Kenya Vision 2030 Delivery Secretariat 2nd Floor KUSCCO Centre, Kilimanjaro Avenue off Mara Road, Upper Hill** during normal office working hours.
- 1.3 Prices quoted should be net inclusive of all taxes, and delivery costs, must be in Kenya Shillings and shall remain valid for 60 days from the closing date of the tender.
- 1.4 Completed tender documents are to be enclosed in plain sealed envelopes, marked with the tender number and name and be deposited in the Tender Box at **2nd Floor KUSCCO Centre, Kilimanjaro Avenue off Mara Road, Upper Hill** or be addressed to **Kenya Vision 2030 Delivery Secretariat, P.O. Box 52301-00200, Nairobi** to be received on or before **Thursday 13th February 2020 at 11.00 am.**
- 1.5 Tenders will be opened immediately thereafter in the presence of the candidates representatives who choose to attend at the **Boardroom, 2nd Floor KUSCCO Centre, Kilimanjaro Avenue off Mara Road, Upper Hill**

DIRECTOR GENERAL

SECTION II - INSTRUCTION TO TENDERERS

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SECTION II - INSTRUCTIONS TO TENDERERS

2.1. Eligible Tenderers

- 2.1.1 This Invitation for Tenders is open to all tenderers eligible as described in the Appendix to Instructions to Tenderers. Successful tenderers shall provide the services for the stipulated duration from the date of commencement (hereinafter referred to as the term) specified in the tender documents.
- 2.1.2 The Secretariat's employees, committee members, board members and their relatives (spouse and children) are not eligible to participate in the tender unless where specially allowed under section 66 of the Public Procurement and Asset Disposal Act, 2015 (PPAD).
- 2.1.3 Tenderers shall provide the qualification information statement that the tenderer (including all members of a joint venture and subcontractors) is not associated, or have been associated in the past, directly or indirectly, with a firm or any of its affiliates which have been engaged by VDS to provide consulting services for the preparation of the design, specifications, and other documents to be used for the procurement of the services under this Invitation for tenders.
- 2.1.4 Tenderers involved in the corrupt or fraudulent practices or debarred from participating in public procurement shall not be eligible.

2.2 Cost of Tendering

- 2.2.1 The Tenderer shall bear all costs associated with the preparation and submission of its tender, and VDS, will in no case be responsible or liable for those costs. Regardless of the conduct or outcome of the tendering process
- 2.2.2 The price to be charged for the tender document shall not exceed Kshs.1,000/=
- 2.2.3 The Secretariat shall allow the tenderer to review the tender document free of charge before purchase.

2.3 Contents of Tender Document

2.3.1 The tender documents comprise the documents listed below and addenda issued in accordance with clause 2.5 of these instructions to tenderers.

- (i) Instructions to Tenderers
- (ii) General Conditions of Contract
- (iii) Special Conditions of Contract
- (iv) Schedule of Requirements
- (v) Details of Insurance Cover
- (vi) Form of Tender
- (vii) Price Schedules
- (viii) Contract Form
- (ix) Confidential Business Questionnaire Form
- (x) Tender security Form
- (xi) Performance security Form
- (xii) Insurance Company's Authorization Form
- (xiii) Declaration Form
- (xiv) Request for Review Form

2.3.2 The Tenderer is expected to examine all instructions, forms, terms and specification in the tender documents. Failure to furnish all information required by the tender documents or to submit a tender not substantially responsive to the tender documents in every respect will be at the tenderers risk and may result in the rejection of its tender.

2.4 Clarification of Tender Documents

2.4.1 A Candidate making inquiries of the tender documents may notify VDS by post fax or by email at the Secretariat's address indicated in the Invitation for tenders. VDS will respond in writing to any request for clarification of the tender documents, which it receives not later than two (2) days prior to the deadline for the submission of the tenders, prescribed by the Secretariat. Written copies of the Secretariat's response (including an explanation of the query but without identifying the source of inquiry) will be sent to all candidates who have received the tender documents.

2.4.2 VDS shall reply to any clarifications sought by the tenderer within 1 day of receiving the request to enable the tenderer to make timely submission of its tender.

2.4.3 Preference where allowed in the evaluation of tenders shall not exceed 15%

2.5 Amendment of Tender Documents

2.5.1 At any time prior to the deadline for submission of tenders, VDS, for any reason, whether at its own initiative or in response to a clarification requested by a prospective tenderer, may modify the tender documents by issuing an addendum.

2.5.2 All prospective tenderers who have obtained the tender documents will be notified of the amendment by post, fax or email and such amendment will be binding on them.

2.5.3 In order to allow prospective tenderers reasonable time in which to take the amendment into account in preparing their tenders, VDS, at its discretion, may extend the deadline for the submission of tenders.

2.6 Language of Tenders

2.6.1 The tender prepared by the tenderer, as well as all correspondence and documents relating to the tender exchanged by the tenderer and the Secretariat, shall be written in English language. Any printed literature furnished by the tenderer may be written in another language provided they are accompanied by an accurate English translation of the relevant passages in which case, for purposes of interpretation of the tender, the English translation shall govern.

2.7. Documents Comprising the Tender

2.7.1 The tender prepared by the tenderer shall comprise the following components:

- (a) A Tender Form and a Price Schedule completed in accordance with paragraph 2.8, 2.9 and 2.10 below
- (b) Documentary evidence established in accordance with paragraph 2.1.2 that the tenderer is eligible to tender and is qualified to perform the contract if its tender is accepted;
- (c) Tender security furnished in accordance with paragraph 2.12 (if applicable)
- (d) Declaration Form.

2.8. Form of Tender

2.8.1 The tenderer shall complete the Tender Form and the Price Schedule furnished in the tender documents, indicating the services to be provided.

2.9. Tender Prices

2.9.1 The tenderer shall indicate on the form of tender and the appropriate Price Schedule the unit prices and total tender price of the services it proposes to provide under the contract.

2.9.2 Prices indicated on the Price Schedule shall be the cost of the services quoted including all customs duties and VAT and other taxes payable.

2.9.3 Prices quoted by the tenderer shall remain fixed during the Term of the contract unless otherwise agreed by the parties. A tender submitted with an adjustable price quotation will be treated as non-responsive and will be rejected, pursuant to paragraph 2.20.5

2.10. Tender Currencies

2.10.1 Prices shall be quoted in Kenya Shillings

2.11. Tenderers Eligibility and Qualifications

2.11.1 Pursuant to paragraph 2.1 the tenderer shall furnish, as part of its tender, documents establishing the tenderers eligibility to tender and its qualifications to perform the contract if it's tender is accepted.

2.11.2 The documentary evidence of the tenderer's qualifications to perform the contract if its tender is accepted shall establish to the Secretariat's satisfaction that the tenderer has the financial and technical capability necessary to perform the contract.

2.12. Tender Security

2.12.1 The tenderer shall furnish, as part of its tender, a tender security for the amount and form specified in the Appendix to Instructions to Tenderers.

2.12.2 The tender security shall not exceed 2 per cent of the tender price.

2.12.3 The tender security is required to protect the VDS against the risk of Tenderer's conduct which would warrant the security's forfeiture, pursuant to paragraph 2.12.7

2.12.4 The tender security shall be denominated in Kenya Shillings or in another freely convertible currency, and shall be in the form

- a) Cash.
- b) A bank guarantee.
- c) Such insurance guarantee approved by the Authority.
- d) Letter of credit.

2.12.5 Any tender not secured in accordance with paragraph 2.12.1. and 2.12.3 shall be rejected by VDS as non-responsive, pursuant to paragraph 2.20.5

2.12.6 Unsuccessful Tenderer's tender security will be discharged or returned as promptly as possible but not later than thirty (30) days after the expiration of the period of tender validity

2.12.7 The successful Tenderer's tender security will be discharged upon the tenderer signing the contract, pursuant to paragraph 2.29, and furnishing the performance security, pursuant to paragraph 2.30

2.12.8 The tender security may be forfeited:

- (a) if a tenderer withdraws its tender during the period of tender validity.
- (b) in the case of a successful tenderer, if the tenderer fails:
 - (i) to sign the contract in accordance with paragraph 2.29 or
 - (ii) to furnish performance security in accordance with paragraph 2.30.
- (c) If the tenderer rejects correction of an arithmetic error in the tender.

2.13. Validity of Tenders

2.13.1 Tenders shall remain valid for 60 days after date of tender opening pursuant to paragraph 2.18. A tender valid for a shorter period shall be rejected by VDS as non-responsive.

2.13.2 In exceptional circumstances, VDS may solicit the Tenderer's consent to an extension of the period of validity. The request and the responses thereto shall be made in writing. The tender security provided under paragraph 2.12 shall also be suitably extended. A tenderer granting the request will not be required nor permitted to modify its tender.

2.14. Format and Signing of Tenders

2.14.1 The tenderer shall prepare an original and a copy of the tender, clearly marking each “ORIGINAL TENDER” and “COPY OF TENDER,” as appropriate. In the event of any discrepancy between them, the original shall govern.

2.14.2 The original and all copies of the tender shall be typed or written in indelible ink and shall be signed by the tenderer or a person or persons duly authorized to bind the tenderer to the contract. All pages of the tender, except for un-amended printed literature, shall be initialed by the person or persons signing the tender.

2.14.3 The tender shall have no interlineations, erasures, or overwriting except as necessary to correct errors made by the tenderer, in which case such corrections shall be initialed by the person or persons signing the tender.

2.15 Sealing and Marking of Tenders

2.15.1 The tenderer shall seal the original and the copy of the tender in separate envelopes, duly marking the envelopes as “ORIGINAL TENDER” and “COPY OF TENDER”. The envelopes shall then be sealed in an outer envelope.

2.15.2 The inner and outer envelopes shall:

- (a) Be addressed to the Secretariat’s address given in the Invitation to Tender.

2.15.3 Bear tender number and name in the invitation to tender and the words, “DO NOT OPEN BEFORE **time indicated under invitation to tender.**”

2.15.4 The inner envelopes shall also indicate the name and address of the tenderer to enable the tender to be returned unopened in case it is declared “late”.

2.15.5 If the outer envelope is not sealed and marked as required by paragraph 2.15.2, VDS will assume no responsibility for the tender’s misplacement or premature opening.

2.16. Deadline for Submission of Tenders

2.16.1 Tenders must be received by the Secretariat at the address specified under paragraph 2.15.2 not later than **February 13th 2020 at 11.00 am.**

2.16.2 The Secretariat may, at its discretion, extend this deadline for the submission of tenders by amending the tender documents in accordance with paragraph 2.5.3 in which case all rights and obligations of VDS and candidates previously subject to the deadline will thereafter be subject to the deadline as extended.

2.16.3 Bulky tenders which will not fit the tender box shall be received by VDS as provided for in the appendix.

2.17. Modification and Withdrawal of Tenders

2.17.1 The tenderer may modify or withdraw its tender after the tender's submission, provided that written notice of the modification, including substitution or withdrawal of the tenders, is received by VDS prior to the deadline prescribed for submission of tenders.

2.17.2 The tenderer's modification or withdrawal notice shall be prepared, sealed, marked and dispatched in accordance with the provisions of paragraph 2.15. a withdrawal notice may also be sent by fax or email but followed by a signed confirmation copy, postmarked not later than the deadline for submission of tenders.

2.17.3 No tender may be modified after the deadline for submission of tenders.

2.17.4 No tender may be withdrawn in the interval between the deadline for submission of tenders and the expiration of the period of tender validity. Withdrawal of a tender during this interval may result in the Tenderer's forfeiture of its tender security, pursuant to paragraph 2.12.7.

2.18. Opening of Tenders

2.18.1 VDS will open all tenders in the presence of tenderers' representatives who choose to attend at the time and the location specified in the invitation for tenders. The tenderers' representatives who are present shall sign a register evidencing their attendance

2.18.2 The tenderers' names, tender modifications or withdrawals, tender prices, discounts, and the presence or absence of requisite tender security and such other details as VDS, at its discretion, may consider appropriate, will be announced at the opening.

2.18.3 VDS will prepare minutes of the tender opening, which will be submitted to tenderers that signed the tender opening register and will have made the request.

2.19 Clarification of Tenders

- 2.19.1 To assist in the examination, evaluation and comparison of tenders VDS may, at its discretion, ask the tenderer for a clarification of its tender. The request for clarification and the response shall be in writing, and no change in the prices or substance of the tender shall be sought, offered, or permitted.
- 2.19.2 Any effort by the tenderer to influence VDS in the Secretariat's tender evaluation, tender comparison or contract award decisions may result in the rejection of the tenderers' tender.

2.20 Preliminary Examination and Responsiveness

- 2.20.1 VDS will examine the tenders to determine whether they are complete, whether any computational errors have been made, whether required sureties have been furnished, whether the documents have been properly signed, and whether the tenders are generally in order.
- 2.20.2 Arithmetical errors will be rectified on the following basis. If there is a discrepancy between the unit price and the total price that is obtained by multiplying the unit price and quantity, the unit price shall prevail, and the total price shall be corrected. If the candidate does not accept the correction of the errors, its tender will be rejected, and its tender security forfeited. If there is a discrepancy between words and figures, the amount in words will prevail
- 2.20.3 VDS may waive any minor informality or non-conformity or irregularity in a tender which does not constitute a material deviation provided such waiver does not prejudice or affect the relative ranking of any tenderer.
- 2.20.4 Prior to the detailed evaluation, pursuant to paragraph 2.20, VDS will determine the substantial responsiveness of each tender to the tender documents. For purposes of these paragraphs, a substantially responsive tender is one which conforms to all the terms and conditions of the tender documents without material deviations the Secretariat's determination of a tender's responsiveness is to be based on the contents of the tender itself without recourse to extrinsic evidence.
- 2.20.5 If a tender is not substantially responsive, it will be rejected by VDS and may not subsequently be made responsive by the tenderer by correction of the nonconformity.

2.21. Conversion to single currency

2.21.1 Where other currencies are used, VDS will convert those currencies to Kenya Shillings using the selling exchange rate on the date of tender closing provided by the Central Bank of Kenya.

2.22. Evaluation and Comparison of Tenders

2.22.1 VDS will evaluate and compare the tenders which have been determined to be substantially responsive, pursuant to paragraph 2.20

2.22.2 The Secretariat's evaluation of a tender will take into account, in addition to the tender price, the following factors, in the manner and to the extent indicated in paragraph 2.22.3.

(A) Operational plan proposed in the tender;

(b) Deviations in payment schedule from that specified in the Special Conditions of Contract

2.22.3 Pursuant to paragraph 2.22.2. the following evaluation methods will be applied.

(a) Operational Plan

(i) VDS requires that the services under the Invitation for Tenders shall be performed at the time specified in the Schedule of Requirements. Tenders offering to perform longer than the Secretariat's required delivery time will be treated as non-responsive and rejected.

(b) Deviation in payment schedule

(i) Tenderers shall state their tender price for the payment on schedule outlined in the special conditions of contract. Tenders will be evaluated on the basis of this base price. Tenderers are, however, permitted to state an alternative payment schedule and indicate the reduction in tender price they wish to offer for such alternative payment schedule. VDS may consider the alternative payment schedule offered by the selected tenderer.

2.22.4 The tender evaluation committee shall evaluate the tender within 30 days from the date of opening the tender.

2.23. Contacting the Secretariat

2.23.1 Subject to paragraph 2.19 no tenderer shall contact VDS on any matter relating to its tender, from the time of the tender opening to the time the contract is awarded.

2.23.2 Any effort by a tenderer to influence VDS in its decisions on tender evaluation, tender comparison, or contract award may result in the rejection of the Tenderers' tender.

2.24 Post-qualification

2.24.1 VDS will verify and determine to its satisfaction whether the tenderer that is selected as having submitted the lowest evaluated responsive tender is qualified to perform the contract satisfactorily.

2.24.2 The determination will consider the tenderer financial and technical capabilities. It will be based upon an examination of the documentary evidence of the tenderer's qualifications submitted by the tenderer, pursuant to paragraph 2.11.2, as well as such other information as VDS deems necessary and appropriate

2.24.3 An affirmative determination will be a prerequisite for award of the contract to the tenderer. A negative determination will result in rejection of the Tenderer's tender, in which event the VDS will proceed to the next lowest evaluated tender to make a similar determination of that Tenderer's capabilities to perform satisfactorily.

2.25 Award Criteria

2.25.1 Subject to paragraph 2.29 VDS will award the contract to the successful tenderer whose tender has been determined to be substantially responsive and has been determined to be the lowest evaluated tender, provided further that the tenderer is determined to be qualified to perform the contract satisfactorily.

2.25.2 To qualify for contract awards, the tenderer shall have the following: -

- (a) Necessary qualifications, capability experience, services, equipment and facilities to provide what is being procured.
- (b) Legal capacity to enter into a contract for procurement

- (c) Shall not be insolvent, in receivership, bankrupt or in the process of being wound up and is not the subject of legal proceedings relating to the foregoing.
- (d) Shall not be debarred from participating in public procurement.

2.26. Secretariat's Right to accept or Reject any or all Tenders

2.26.1 VDS reserves the right to accept or reject any tender, and to annul the tendering process and reject all tenders at any time prior to contract award, without thereby incurring any liability to the affected tenderer or tenderers or any obligation to inform the affected tenderer or tenderers of the grounds for the Secretariat's action. If VDS determines that none of the tenders is responsive, VDS shall notify each tenderer who submitted a tender.

2.26.2 VDS shall give prompt notice of the termination to the tenderers and on request give its reasons for termination within 14 days of receiving the request from any tenderer.

2.26.3 A tenderer who gives false information in the tender document about its qualification or who refuses to enter into a contract after notification of contract award shall be considered for debarment from participating in future public procurement.

2.27 Notification of Award

2.27.1 Prior to the expiration of the period of tender validity, VDS will notify the successful tenderer in writing that its tender has been accepted.

2.27.2 The notification of award will signify the formation of the contract subject to the signing of the contract between the tenderer and VDS pursuant to clause 2.9. Simultaneously the other tenderers shall be notified that their tenders were not successful.

2.27.3 Upon the successful Tenderer's furnishing of the performance security pursuant to paragraph 2.29 VDS will promptly notify each unsuccessful Tenderer and will discharge its tender security, pursuant to paragraph 2.12

2.28 Signing of Contract

2.28.1 At the same time as VDS notifies the successful tenderer that its tender has been accepted, VDS will simultaneously inform the other tenderers that their tenders have not been successful.

2.28.2 Within fourteen (14) days of receipt of the Contract Form, the successful tenderer shall sign and date the contract and return it to VDS.

2.28.3 The contract will be definitive upon its signature by the two parties.

2.28.4 The parties to the contract shall have it signed within 30 days from the date of notification of contract award unless there is an administrative review request.

2.29 Performance Security

2.29.1 The successful tenderer shall furnish the performance security in accordance with the Conditions of Contract, in a form acceptable to VDS.

2.29.2 Failure by the successful tenderer to comply with the requirement of paragraph 2.29 or paragraph 2.30.1 shall constitute sufficient grounds for the annulment of the award and forfeiture of the tender security, in which event VDS may make the award to the next lowest evaluated tender or call for new tenders.

2.30 Corrupt or Fraudulent Practices

2.30.1 VDS requires that tenderers observe the highest standard of ethics during the procurement process and execution of contracts. A tenderer shall sign a declaration that he has not and will not be involved in corrupt or fraudulent practices.

2.30.2 VDS will reject a proposal for award if it determines that the tenderer recommended for award has engaged in corrupt or fraudulent practices in competing for the contract in question

2.30.3 Further a tenderer who is found to have indulged in corrupt or fraudulent practices risks being debarred from participating in public Procurement in Kenya.

Appendix to Instructions to Tenderers

Appendix to instructions to Tenderers

The following information for procurement of Group Life Insurance cover services shall complement or amend the provisions of the instructions to tenderers.

Wherever there is a conflict between the provisions of the instructions to tenderers and the provisions of the appendix, the provisions of the appendix herein shall prevail over those of the instructions to tenderers.

Instructions to Tenderers	Particulars of appendix to instructions to tenderers
2.1	The tender is for all eligible and qualified firms and the successful supplier shall be required to provide insurance services for Group Life Insurance.
2.1.1	<p>Your proposal should be submitted with the following information:</p> <p>A) <u>Mandatory Documents/Information (Preliminary evaluation)</u></p> <p><i>Certified</i> copies of the following:</p> <ol style="list-style-type: none"> 1) Certificate of Registration/Incorporation 2) Valid Tax Compliance Certificate 3) Valid Single Business License 4) Pin Certificate 5) Valid Certificate from Association of Insurance Brokers of Kenya (AIBK) 6) Valid registration certificate as Insurance Broker with Insurance Regulatory Authority (IRA) <p><i>Note: Documents to be certified by Commissioner of Oaths or an advocate.</i></p> <p>Other documents not requiring to be certified:</p> <ol style="list-style-type: none"> 7) Dully completed Confidential Business Questionnaire (<i>filled, stamped and signed by authorized signatory</i>) 8) Dully completed form of tender 9) Letter of Authorization from the underwriter to submit a proposal on their behalf (<i>it must be in original letterhead signed by an authorized officer</i>) 10) A Written self-confirmation that you are not debarred from participating in Public Procurement by PPRA 11) Pagination/serialization of the tender document <p><i>Please note failure to submit any of these leads to automatic disqualification. Your bid shall not proceed to technical evaluation.</i></p>
2.2.2	This tender document is provided free of charge electronically only
2.12	Tender Security/Bind Bond is not Required
2.15.1	The tender shall be prepared in one stage envelop systems that includes Technical and Financial proposal. The outer envelope shall indicate “ VDS/06/2019-2020 – Provision of Group Life Insurance Cover ”
	Note: Please provide one hard copy and one soft copy of the tender

2.24.3	<p>The Criteria for the evaluation of Technical and Financial Proposals are as follows:</p> <p>A) Technical Evaluation</p> <p>This will be based on the technical proposal submitted in accordance with the forms provided and the following criteria shall be used: -</p> <p>Technical Score : 100/100 The minimum qualifying mark for technical is 80/100 Only bids that pass the technical evaluation shall be considered for financial stage. The award criteria shall be least quoted technically compliant bidder</p> <table border="1" data-bbox="381 441 1404 1659"> <thead> <tr> <th>No.</th> <th>Scope</th> <th>Marks</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>Provide a detailed write up of the execution of the cover providing details of Free cover limit of a minimum 15million, last expense, death due to illnesses such as HIV/AIDS and related illnesses, pre-existing conditions, congenital conditions and critical illnesses.</td> <td>15</td> </tr> <tr> <td>2</td> <td>Evidence of settling claims in excess of 5 million each to reputable clients (attach copies of 4 discharge vouchers or equivalent)</td> <td>12</td> </tr> <tr> <td>3</td> <td>Experience (attach contract of 5 clients of similar work done in the last 4 years)</td> <td>15</td> </tr> <tr> <td>4</td> <td>Must have been in existence for the last 5 years providing similar services. Attach 5 recommendations letters from reputable clients</td> <td>15</td> </tr> <tr> <td>5</td> <td>Provide a methodology and workplan for claims handling procedure and turn around period (not to exceed 30 days)</td> <td>10</td> </tr> <tr> <td>6</td> <td>Provide at least four (4) key personnel with specific portfolio/task each with the following qualification and experience Contract Manager – Minimum undergraduate Bachelor degree in insurance or Actuarial Science Plus an Associate of Chartered Institute or Equivalent (attach Certificates and CV , experience of not less than seven (7) years as a senior manager in the insurance industry – 8 marks The other two must have a minimum of a Diploma of Chartered Insurance Institute or Equivalent (attach copies of certificates and Testimonials) and a minimum of five (5) years’ Management skills and qualifications – 7 marks</td> <td>15</td> </tr> <tr> <td>7</td> <td>Minimum annual turnover of Kshs. 100,000,000.00. (2018)</td> <td>8</td> </tr> <tr> <td>8</td> <td>Audited accounts for the two years (2017 & 2018 (5 marks each)</td> <td>10</td> </tr> </tbody> </table> <p>B. Financial Evaluation</p> <p>The Award criteria is to the lowest quoted bidder provided one has met threshold under technical 80/100</p>	No.	Scope	Marks	1	Provide a detailed write up of the execution of the cover providing details of Free cover limit of a minimum 15million, last expense, death due to illnesses such as HIV/AIDS and related illnesses, pre-existing conditions, congenital conditions and critical illnesses.	15	2	Evidence of settling claims in excess of 5 million each to reputable clients (attach copies of 4 discharge vouchers or equivalent)	12	3	Experience (attach contract of 5 clients of similar work done in the last 4 years)	15	4	Must have been in existence for the last 5 years providing similar services. Attach 5 recommendations letters from reputable clients	15	5	Provide a methodology and workplan for claims handling procedure and turn around period (not to exceed 30 days)	10	6	Provide at least four (4) key personnel with specific portfolio/task each with the following qualification and experience Contract Manager – Minimum undergraduate Bachelor degree in insurance or Actuarial Science Plus an Associate of Chartered Institute or Equivalent (attach Certificates and CV , experience of not less than seven (7) years as a senior manager in the insurance industry – 8 marks The other two must have a minimum of a Diploma of Chartered Insurance Institute or Equivalent (attach copies of certificates and Testimonials) and a minimum of five (5) years’ Management skills and qualifications – 7 marks	15	7	Minimum annual turnover of Kshs. 100,000,000.00. (2018)	8	8	Audited accounts for the two years (2017 & 2018 (5 marks each)	10
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Variation	In case of any variations during the contract term, the Consumer Price Index and the Central Bank’s Mean rate will be applicable																											

SECTION III - GENERAL CONDITIONS OF CONTRACT

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SECTION III GENERAL CONDITIONS OF CONTRACT

3.1. Definitions

3.1.1 In this Contract, the following terms shall be interpreted as indicated:

- (a) “The Contract” means the agreement entered into between VDS and the tenderer, as recorded in the Contract Form signed by the parties, including all attachments and appendices thereto and all documents incorporated by reference therein.
- (b) “The Contract Price” means the price payable to the tenderer under the Contract for the full and proper performance of its contractual obligations
- (c) “The Services” means services to be provided by the tenderer including any documents, which the tenderer is required to provide to VDS under the Contract.
- (d) “The Procuring entity” means the organization procuring the services under this Contract
- (e) “The Contractor” means the organization or firm providing the services under this Contract.
- (f) “GCC” means the General Conditions of Contract contained in this section.
- (g) “SCC” means the Special Conditions of Contract
- (h) “Day” means calendar day

3.2. Application

3.2.1 These General Conditions shall apply to the extent that they are not superseded by provisions of other part of the contract.

3.3. Standards

3.3.1 The services provided under this Contract shall conform to the standards mentioned in the schedule of requirements.

3.4. Use of Contract Documents and Information

3.4.1 The Contractor shall not, without the Secretariat's prior written consent, disclose the Contract, or any provision thereof, or any specification, plan, drawing, pattern, sample, or information furnished by or on behalf of VDS in connection therewith, to any person other than a person employed by the contractor in the performance of the Contract.

3.4.2 The Contractor shall not, without the Secretariat's prior written consent, make use of any document or information enumerated in paragraph 3.4.1 above.

3.4.3 Any document, other than the Contract itself, enumerated in paragraph 3.4.1 shall remain the property of VDS and shall be returned (all copies) to VDS on completion of the contract's or performance under the Contract if so required by the Secretariat.

3.5. Patent Rights

3.5.1 The Contractor shall indemnify VDS against all third-party claims of infringement of patent, trademark, or industrial design rights arising from use of the services under the contract or any part thereof.

3.6 Performance Security

3.6.1 Within twenty-eight (28) days of receipt of the notification of Contract award, the successful tenderer shall furnish to VDS the performance security where applicable in the amount specified in SCC

3.6.2 The proceeds of the performance security shall be payable to VDS as compensation for any loss resulting from the Tenderer's failure to complete its obligations under the Contract.

3.6.3 The performance security shall be denominated in the currency of the Contract, or in a freely convertible currency acceptable to VDS and shall be in the form of:

a) Cash.

- b) A bank guarantee.
- c) Such insurance guarantee approved by the Authority.
- d) Letter of credit.

3.6.4 The performance security will be discharged by VDS and returned to the Candidate not later than thirty (30) days following the date of completion of the Contractor's performance of obligations under the Contract, including any warranty obligations, under the Contract.

3.7. Delivery of services and Documents

3.7.1 Delivery of the services shall be made by the Contractor in accordance with the terms specified by VDS in the schedule of requirements and the special conditions of contract

3.8. Payment

3.8.1. The method and conditions of payment to be made to the contractor under this Contract shall be specified in SCC

3.8.2. Payment shall be made promptly by VDS, but in no case later than sixty (60) days after submission of an invoice or claim by the contractor

3.9. Prices

3.9.1 Prices charges by the contractor for Services performed under the Contract shall not, with the exception of any price adjustments authorized in SCC vary from the prices quoted by the tenderer in its tender or in the Secretariat's request for tender validity extension the case may be. No variation in or modification to the terms of the contract shall be made except by written amendments signed by the parties.

3.9.2 Contract price variations shall not be allowed for contracts not exceeding one year (12 months)

3.9.3 Where contract price variation is allowed the variation shall not exceed 10% of the original contract price

3.9.4 Price variation requests shall be processed by VDS within 30 days of receiving the request.

3.10. Assignment

3.10.1 The Contractor shall not assign, in whole or in part, its obligations to perform under this Contract, except with the Secretariat's prior written consent.

3.11. Termination for Default

3.11.1 VDS may, without prejudice to any other remedy for breach of Contract, by written notice of default sent to the Contractor terminate this Contract in whole or in part:

- (a) if the Contractor fails to provide any or all of the services within the period(s) specified in the Contract, or within any extension thereof granted by VDS.
- (b) If the Contractor fails to perform any other obligation(s) under the Contract
- (c) If the Contractor in the judgment of VDS has engaged in corrupt or fraudulent practices in competing for or in executing the contract

3.11.2 In the event VDS terminates the contract in whole or in part, it may procure, upon such terms and in such manner as it deems appropriate, services similar to those un-delivered, and the Contractor shall be liable to VDS for any excess costs for such similar services. However, the contractor shall continue performance of the contract to extent not terminated.

3.12. Termination for Insolvency

3.12.1 VDS may at any time terminate the contract by giving written notice to the Contractor if the contractor becomes bankrupt or otherwise insolvent. In this event, termination will be without compensation to the contractor, provided that such termination will not prejudice or affect any right of action or remedy, which has accrued or will accrue thereafter to VDS.

3.13. Termination for Convenience

3.13.1 VDS by written notice sent to the contractor, may terminate the contract in whole or in part, at any time for its convenience. The notice of termination shall specify that the termination is for VDS convenience, the extent to

which performance of the contractor of the contract is terminated and the date on which such termination becomes effective.

- 3.13.2 For the remaining part of the contract after termination VDS may elect to cancel the services and pay to the contractor an agreed amount for partially completed services.

3.14 Resolution of Disputes

- 3.14.1 VDS and the contractor shall make every effort to resolve amicably by direct informal negotiations and disagreement or disputes arising between them under or in connection with the contract

- 3.14.2 If after thirty (30) days from the commencement of such informal negotiations both parties have been unable to resolve amicably a contract dispute either party may require that the dispute be referred for resolution to the formal mechanisms specified in the SCC.

3.15. Governing Language

- 3.15.1. The contract shall be written in the English language. All correspondence and other documents pertaining to the contract, which are exchanged by the parties shall be written in the same language.

3.16. Applicable Law

- 3.16.1 The contract shall be interpreted in accordance with the laws of Kenya unless otherwise expressly specified in the SCC.

3.17 Force Majeure

- 3.17.1 The Contractor shall not be liable for forfeiture of its performance security, or termination for default if and to the extent that its delay in performance or other failure to perform its obligations under the Contract is the result of an event of Force Majeure.

3.18 Notices

- 3.18.1 Any notices given by one party to the other pursuant to this contract shall be sent to the other party by post or by Fax or Email and confirmed in writing to the other party's address specified in the SCC.

3.18.2 A notice shall be effective when delivered or on the notices effective date, whichever is later.

SECTION IV - SPECIAL CONDITIONS OF CONTRACT

Notes on Special Conditions of Contract

1. The clauses in this section are intended to assist the procuring entity in providing contract-specific information in relation to corresponding clauses in the General Conditions of Contract
2. The Provisions of Section IV complement the General Conditions of Contract included in Section III, specifying contractual requirements linked to the special circumstances of the procuring entity and the insurance cover required. In preparing Section IV, the following aspects should be taken into consideration.
 - (a) Information that complement provisions of Section III must be incorporated; and
 - (b) Amendments and/or supplements to provisions of Section III, as necessitated by the circumstances of the specific insurance cover required must also be incorporated.
3. Where there is a conflict between the provisions of the special conditions of contract and the provisions of the general conditions of contract, the provisions of the special conditions of contract shall prevail over the provisions of the general conditions of contract.
4. Any clause to be included in this section must be consistent with the applicable public procurement law and regulations.

4.1. CONDITIONS TO BE MET BY THE BROKERAGE COMPANY (MANDATORY)

- 4.1.1 Must be registered with the Insurance Regulatory Authority for the current year and a copy of the current license be submitted.
- 4.1.2 Must give a list of Five (5 no.) reputable clients (provide evidence)
- 4.1.3 Must submit **certified copies** of the following documents;
 - (a) KRA pin Certificate

- (b) Valid Tax Compliance Certificate
 - (c) Certificate of Registration/Incorporation
 - (d) Valid Trade license
- 4.1.4 Must be a member of the Association of Insurance Brokers of Kenya (AIBK)
- 4.1.5 Completion of S33 Confidential Business Questionnaire under Section VI-Standard Forms.
- 4.1.6 Brokerage companies to submit only one bid with a forwarding letter stating the name of the underwriter.
- 4.1.7 A written self-confirmation that firm is not debarred as a service provide by PPRA (signed and stamped)

4.2. CONDITIONS TO BE MET BY THE INSURANCE COMPANY (MANDATORY)

- 4.2.1. Must be registered with the Insurance Regulatory Authority for the current year and a copy of the current license be submitted.
- 4.2.2. Must give a list of Five (5 no.) reputable clients (provide evidence)
- 4.2.3. Must submit **certified copies** of the following documents;
- (e) KRA pin Certificate
 - (f) Valid Tax Compliance Certificate
 - (g) Certificate of Registration/Incorporation
 - (h) Valid Trade license
- 4.2.4. Must be a member of the Association of Kenya Insurance (AKI)/relevant association
- 4.2.5. Completion of S33 Confidential Business Questionnaire under Section VI-Standard Forms.
- 4.2.6. A written self-confirmation that firm is not debarred as a service provide by PPRA (signed and stamped)

4.3 Special Conditions of Contract as relates to the General Conditions of Contract

Reference of general conditions of Contract	Special condition of contract
2.12.1 Tender Security	Not Applicable
3.6 Performance security	Not Applicable
3.7 Delivery of Services	As specified in the schedule of requirements

3.16 Applicable law	Laws of Kenya
3.18 Notices	Kenya Vision 2030 Delivery Secretariat, 2nd Floor Kuscco Centre, Kilimanjaro Avenue off Mara Road, Upper Hill P.O Box 52301-00200 Tel: +254 (20) 2722030 Email:procurement@vision2030.go.ke

SECTION V-SCHEDULE OF REQUIREMENTS

Notes for preparing Schedule of Requirements.

1. The schedule of Requirements shall be included in the tender documents by VDS and shall cover, at the minimum, a description of the insurance cover to be provided and full particulars of the same.
2. The objectives of the schedule of requirements is to provide sufficient information to enable tenderers to prepare their tenders comprehensively, efficiently and accurately. In particular the price schedule for which a form is provided in Section VI must be carefully completed.
3. In addition, the schedule of requirements together with the price schedule should serve as a basis in the event of services variation at the time of award of contract pursuant to instruction to tenderers paragraph 2.26

Terms of Reference for Provision of Insurance Services

The Kenya Vision 2030 Delivery Secretariat (VDS) is a Semi-autonomous Government Agency (SAGA) whose mandate is to spearhead the implementation of the government blueprint on Vision 2030. The head office is in Upper hill area Nairobi where all our staff are based. However, some positions require a lot of travelling both within and outside the country especially for the senior management.

The Secretariat (VDS) wishes to procure Group Life Insurance Cover for all its employees to cover for death while in employment with VDS. The insurance cover should provide a lump sum benefit to the employee's beneficiaries in the event of death due to any cause while the employee is in the Service of VDS) The sum assured per employee is based on Five (5) times their annual basic salary as indicated in the schedule below.

The Group Life cover should cater for a minimum of the following:

- a. One-year Group Life Cover effective 1st March 2020
- b. Death (accidental or due to illness)
- c. Death due to illnesses such as HIV/AIDS related illnesses, pre-existing conditions, congenital conditions and critical illnesses should also be covered.
- d. Death either within or outside the country
- e. Group Last expense

The proposal should include the following:

- a. The free cover limits (FCL) i.e. the sum assured for which no medical examination is required
- b. The cost of medical examination for covers above the free cover limits (if any)
- c. The cover limitations and exclusions
- d. Waiting period (if any)

	Position	Monthly Basic Salary	Annual Basic Salary	Sum Assured
1	Director	367,500	4,410,000	22,050,000
2	Director	367,500	4,410,000	22,050,000
3	Director	367,500	4,410,000	22,050,000
4	Assistant Director	275,000	3,300,000	16,500,000
5	Manager	157,500	1,890,000	9,450,000
6	Manager	157,500	1,890,000	9,450,000
7	Accountant	63,000	756,000	3,780,000
8	Driver	33,500	403,200	2,016,000
9	Driver	33,600	403,200	2,016,000
10	Driver	33,600	403,200	2,016,000
11	Office Administrator	52,500	630,000	3,150,000
12	Office Administrator	52,500	630,000	3,150,000
13	Office Administrator	52,500	630,000	3,150,000
14	Officer	52,500	630,000	3,150,000
15	Officer	52,500	630,000	3,150,000
16	Officer	52,500	630,000	3,150,000
17	Receptionist	36,750	441,000	2,205,000
18	Office Assistant	26,250	315,000	1,575,000

GROUP PERSONAL INSURANCE COVER DETAILS

This cover is meant to cater for the VDS employees only in case of accidental injury or death.

The cover shall provide for the following:

- i. Death in case of accident
- ii. Permanent total disability
- iii. Temporary total disability
- iv. Loss of income up 105 weeks

SECTION VI - STANDARD FORMS

Notes on the standard Forms

1. **Form of TENDER** - The form of Tender must be completed by the tenderer and submitted with the tender documents. It must also be duly signed by duly authorized representatives of the tenderer.
2. **Price Schedule Form** - The price schedule form must similarly be completed and submitted with the tender.
3. **Contract Form** - The contract form shall not be completed by the tenderer at the time of submitting the tender. The contract form shall be completed after contract award and should incorporate the accepted contract price.
4. **Confidential Business Questionnaire Form** - This form must be completed by the tenderer and submitted with the tender documents.
5. **Tender Security Form** - When required by the tender document the tenderer shall provide the tender security either in the form included hereinafter or in another format acceptable to the procuring entity.
6. **Performance security Form** - The performance security form should not be completed by the tenderer at the time of tender preparation. Only the successful tenderer will be required to provide performance security in the form provided herein or in another form acceptable to VDS.

Form of Tender

To: _____
Name and address of procuring entity

Date _____
Tender No. _____
Tender Name _____

Gentlemen and/or Ladies:-

1. Having examined the Tender documents including Addenda No. (Insert numbers) the receipt of which is hereby duly acknowledged, we the undersigned, offer to provide Insurance Services under this tender in conformity with the said Tender document for the sum of
.....[Total Tender amount in words and figures]
or such other sums as may be ascertained in accordance with the Schedule of Prices attached herewith and made part of this Tender.

2. We undertake, if our Tender is accepted, to provide the Insurance Cover Services in accordance with the conditions of the tender.

3. We agree to abide by this Tender for a period of[number] days from the date fixed for Tender opening of the Instructions to Tenderers, and it shall remain binding upon us and may be accepted at any time before the expiration of that period.

4. This Tender, together with your written acceptance thereof and your notification of award, shall constitute a Contract between us subject to the signing of the contract by both parties.

5. We understand that you are not bound to accept the lowest or any tender you may receive.

Dated this _____ day of _____ 2013

[Signature]

[In the capacity of]

Duly authorized to sign tender for and on behalf of _____

Price Schedule Form

ITEM NO.	DESCRIPTION OF INSURANCE COVER	TOTAL PREMIUM (KSHS.)
1.	Group Life Insurance cover	

Contract Form

THIS AGREEMENT made the _____ day of _____ 20_____ between [name of Procurement entity] of _____ [country of Procurement entity] (hereinafter called “the Procuring entity”) of the one part and [name of tenderer] of _____ [city and country of tenderer] (hereinafter called “the tenderer”) of the other part:

WHEREAS the Procuring entity invited tenders for Provision of Insurance Services and has accepted a tender by the tenderer for the Provision of Insurance Services in the sum of _____ [contract price in words in figures] (hereinafter called “the Contract Price”).

NOW THIS AGREEMENT WITNESSTH AS FOLLOWS: -

1. In this Agreement words and expressions shall have the same meanings as are respectively assigned to them in the Conditions of Contract referred to.
2. The following documents shall be deemed to form and be read and construed as part of this Agreement, viz:
 - (a) the Tender Form and the Price Schedule submitted by the tenderer;
 - (b) the Schedule of Requirements
 - (c) the Details of cover
 - (d) the General Conditions of Contract
 - (e) the Special Conditions of Contract; and
 - (f) the Procuring entity’s Notification of Award
3. In consideration of the payments to be made by the Procuring entity to the tenderer as hereinafter mentioned, the tenderer hereby covenants with the Procuring entity to provide the GPA cover and to remedy defects therein in conformity in all respects with the provisions of the Contract.
4. The Procuring entity hereby covenants to pay the tenderer in consideration of the provision of the services and the remedying of defects therein, the Contract Price or such other sum as may become payable under the provisions of the contract at the times and in the manner prescribed by the contract.

IN WITNESS whereof the parties hereto have caused this Agreement to be executed in accordance with their respective laws the day and year first above written

Signed, sealed, delivered by _____ the _____ (for the Procuring entity)

Signed, sealed, delivered by _____ the _____ (for the tenderer) in the presence of _____

CONFIDENTIAL BUSINESS QUESTIONNAIRE

You are requested to give the particular indicated in Part 1 and either Part 2(a), 2(b), or 2(c)
Whichever applies to your type of business

You are advised that it is a serious offence to give false information on this Form.

Part _____ General:

Business Name
Location of business premises
Plot No. Street/Road
Postal Address Tel. No. Fax Email
Nature of business
Registration Certificate No.

Maximum value of business which you can handle at any one time Kshs.

Name of your bankers Branch

Part 2(a) – Sole Proprietor:

Your name in full Age
Nationality Country of origin
Citizenship details.....

Party 2(b) – Partnership

Give details of partners as follows

	Name	Nationality	Citizenship Details	Shares
1.
2.
3.
4.
5.

Part 2(c) – Registered Company:

Private or public

State the nominal and issued capital of the company –

Nominal Kshs..

Issued Kshs.....

Give details of all directors as follows

	Name	Nationality	Citizenship Details	Shares
1.
2.
3.
4.
5.

Date..... Signature of Tenderer

If a citizen, indicate under “Citizenship Details” whether by Birth, Naturalization or Registration

TENDER SECURITY FORM

Whereas [*name of Bidder*] (hereinafter called <the tenderer> has submitted its bid dated [*date of submission of bid*] for the provision of insurance services (hereinafter called <the tender>

KNOW ALL PEOPLE by these presents that WE [*name of bank*] of [*name of country*], having our registered office at [*name of procuring entity*] (hereinafter called <the procuring entity> in the sum of [*state the amount*] for which payment well and truly to be made to the said procuring entity, the Bank binds itself, its successors, and assigns by these presents. Sealed with the Common Seal of the said Bank this _____ day of _____ 20 _____

THE CONDITIONS of this obligation are:-

1. If the tenderer withdraws its tender during the period of tender validity specified by the procuring entity on the Form; or
2. If the tender, having been notified of the acceptance of its tender by the procuring entity during the period of tender validity
 - (a) fails or refuses to execute the Contract Form, if required; or
 - (b) fails or refuses to furnish the performance security, in accordance with the Instructions to tenders.

We undertake to pay to the procuring entity up to the above amount upon receipt of its first written demand, without the procuring entity having to substantiate its demand, provided that in its demand the procuring entity will note that the amount claimed by it is due to it, owing to the occurrence of one or both of the conditions, specifying the occurred condition(s)

This tender guarantee will remain in force up to and including thirty (30) days after the period of tender validity, and any demand in respect thereof should reach the Bank not later than the above stated date.

[Authorized Signatories and official stamp of the Bank]

(Amend accordingly if provided by Insurance Company)

PERFORMANCE SECURITY FORM

To:.....
[Name of procuring entity]

WHEREAS *[name of tenderer]*
(Hereinafter called “the tenderer”) has undertaken, in pursuance of Contract No. ____
_____ *[reference number of the contract]* dated _____ 20 _____
_____ to supply
[description of insurance services] (Hereinafter called “the Contract”)

AND WHEREAS it has been stipulated by you in the said Contract that the tenderer shall furnish you with a bank guarantee by a reputable bank for a sum specified therein as security for compliance with the Tenderer’s performance obligations in accordance with the Contract

AND WHEREAS we have agreed to give the tenderer a guarantee:

THEREFORE WE hereby affirm that we are Guarantors and responsible to you, on behalf of the tenderer, up to a total of
[amount of the guarantee in words and figures], and we undertake to pay you, upon your first written demand declaring the tenderer to be in default under the Contract and without cavil or argument, any sum of money within the limits of *[Amount of guarantee]* as aforesaid, without your needing to prove or to show grounds or reasons for your demand or the sum specified therein.

This guarantee is valid until the _____ day of _____ 20 ____

Signature and seal of the Guarantors

[Name of bank of financial institution]

[Address]

[Date]

(Amend accordingly if provided by Insurance Company)

LETTER OF NOTIFICATION OF AWARD

Address of Procuring Entity

To: _____

RE: Tender No. _____

Tender Name _____

This is to notify that the contract/s stated below under the above mentioned tender have been awarded to you.

1. Please acknowledge receipt of this letter of notification signifying your acceptance.
2. The contract/contracts shall be signed by the parties within 30 days of the date of this letter but not earlier than 14 days from the date of the letter.
3. You may contact the officer(s) whose particulars appear below on the subject matter of this letter of notification of award.

(FULL PARTICULARS) _____

SIGNED FOR ACCOUNTING OFFICER

REPUBLIC OF KENYA
PUBLIC PROCUREMENT ADMINISTRATIVE REVIEW BOARD
APPLICATION NO.....OF..... 20.....

BETWEEN

.....APPLICANT

AND

.....RESPONDENT (*Procuring Entity*)

Request for review of the decision of the..... (*Name of the Procuring Entity*) of
.....dated the...day of20.....in the matter of Tender No.....of
.....20...

REQUEST FOR REVIEW

I/We.....,the above named Applicant(s), of address: Physical
address.....Fax No.....Tel. No.....Email, hereby request the Public Procurement
Administrative Review Board to review the whole/part of the above mentioned decision on the following
grounds , namely:-

- 1.
- 2.
- etc.

By this memorandum, the Applicant requests the Board for an order/orders that: -

- 1.
- 2.
- etc

SIGNED(Applicant)

Dated on.....day of/...20...

FOR OFFICIAL USE ONLY

Lodged with the Secretary Public Procurement Administrative Review Board on day of
.....20.....

SIGNED
Board Secretary