



REQUEST FOR PROPOSAL (RFP)

TENDER NO: IRA/074/2020-2021

**PROVISION OF CONSULTANCY SERVICES ON POST
RETIREMENT MEDICAL FUND**

**INSURANCE REGULATORY AUTHORITY (IRA)
P.O. BOX 43505-00100
NAIROBI.
Tel: +254-20-4996000**

E-mail: procurement@ira.go.ke; Website: <https://www.ira.go.ke>

NOVEMBER, 2020

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SECTION I: LETTER OF INVITATION

3RD NOVEMBER, 2020

TO: ALL BIDDERS

TENDER NO : IRA/074/2020-2021
TENDER NAME : PROVISION OF CONSULTANCY SERVICES ON POST RETIREMENT MEDICAL FUND

- 1.1 The Insurance Regulatory Authority (IRA) invites sealed proposals for the Provision of Consultancy Services on Post-Retirement Medical Fund. The scope of services is detailed in the terms of reference.
- 1.2 The Request for Proposals (RFP) includes the following documents:
- Section I - Letter of invitation
 - Section II - Information to consultants
 - Appendix to Consultants information
 - Section III - Terms of Reference
 - Section IV - Technical proposals
 - Section V - Financial proposal
 - Section VI - Standard Contract Form
- 1.3 Interested candidates may obtain further information and inspect the Tender documents by downloading the same from our website at www.ira.go.ke or www.tenders.go.ke free of charge. and immediately email their names and contact details to: procurement@ira.go.ke for purposes of clarification, communication or addenda
- 1.4 A pre-tender meeting will be held **VIRTUALLY** via zoom video conferencing on **Monday, 9th November, 2020 at 11:00 a.m.** The Zoom meeting invitation will be created and placed in IRA website where participating bidders can access and participate in the meeting
- 1.5 Completed tender documents are to be submitted virtually via the **email address bids@ira.go.ke and copied to fc helimo@ira.go.ke with password protection.** The subject of the email will be **“IRA/074/2020-2021 – Provision of Consultancy Services on Post-Retirement Medical Fund”** and the tender should be addressed to: -

Chief Executive Officer,
Insurance Regulatory Authority,
10th Floor, Zep Re Place, Longonot Road, Upperhill,
P.O. Box 43505 – 00100 Nairobi, Kenya
Telephone: +254-20-499600

Email: procurement@ira.go.ke; Website: <https://www.ira.go.ke>

so as to be received on or before **12th November, 2020 at 11:00 a.m.**

- 1.6 Tenders will be opened on **12th November, 2020 VIRTUALLY** via zoom video conferencing platform. You shall be required to provide your **password for Technical Proposal on 12th November, 2020 before 11:00 a.m.** via the email address bids@ira.go.ke and copied to fchelimo@ira.go.ke
- 1.7 Upon receipt, please inform us:
(a) that you have received the letter of invitation;
(b) whether or not you will submit a proposal for the assignment,
- 1.8 IRA is a corruption free environment. Any pressure, influence attempt should be reported to the C.E.O through the address provided on paragraph 1.4 above or e-mail ethics@ira.go.ke

Yours sincerely,

FELIX CHELIMO
FOR: CHIEF EXECUTIVE OFFICER
INSURANCE REGULATORY AUTHORITY

SECTION II: INFORMATION TO CONSULTANTS (ITC)

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SECTION II: INFORMATION TO CONSULTANTS (ITC)

2.1 Introduction

- 2.1.1 The Client named the Appendix to “ITC” will select a firm among those invited to submit a proposal, in accordance with the method of selection detailed in the appendix. The method of selection shall be as indicated by the procuring entity in the Appendix.
- 2.1.2 The consultants are invited to submit a Technical Proposal and a Financial Proposal, or a Technical Proposal only, as specified in the Appendix “ITC” for consulting services required for the assignment named in the said Appendix. A Technical Proposal only may be submitted in assignments where the Client intends to apply standard conditions of engagement and scales of fees for professional services which are regulated as is the case with Building and Civil Engineering Consulting services. In such a case the highest ranked firm of the technical proposal shall be invited to negotiate a contract on the basis of scale fees. The proposal will be the basis for Contract negotiations and ultimately for a signed Contract with the selected firm.
- 2.1.3 The consultants must familiarize themselves with local conditions and take them into account in preparing their proposals. To obtain first hand information on the assignment and on the local conditions, consultants are encouraged to liaise with the Client regarding any information that they may require before submitting a proposal and to attend a pre-proposal conference where applicable. Consultants should contact the officials named in the Appendix “ITC” to arrange for any visit or to obtain additional information on the pre-proposal conference. Consultants should ensure that these officials are advised of the visit in adequate time to allow them to make appropriate arrangements.
- 2.1.4 The Procuring entity will provide the inputs specified in the Appendix “ITC”, assist the firm in obtaining licenses and permits needed to carry out the services and make available relevant project data and reports.
- 2.1.5 Please note that (i) the costs of preparing the proposal and of negotiating the Contract, including any visit to the Client are not reimbursable as a direct cost of the assignment; and (ii) the Client is not bound to accept any of the proposals submitted.
- 2.1.6 The procuring entity’s employees, committee members, board members and their relative (spouse and children) are not eligible to participate.
- 2.1.7 The price to be charged for the tender document shall not exceed Kshs.1,000/=.
- 2.1.8 The procuring entity shall allow the tenderer to review the tender document free of charge before purchase.

2.2 Clarification and Amendment of RFP Documents

- 2.2.1 Consultants may request a clarification of any of the RFP documents only up to three [3] days before the proposal submission date. Any request for clarification

must be sent in writing by paper mail, cable, telex, facsimile or electronic mail to the Client's address indicated in the Appendix "ITC". The Client will respond by cable, telex, facsimile or electronic mail to such requests and will send written copies of the response (including an explanation of the query but without identifying the source of inquiry) to all invited consultants who intend to submit proposals.

2.2.2 At any time before the submission of proposals, the Client may for any reason, whether at his own initiative or in response to a clarification requested by an invited firm, amend the RFP. Any amendment shall be issued in writing through addenda. Addenda shall be sent by mail, cable, telex or facsimile to all invited consultants and will be binding on them. The Client may at his discretion extend the deadline for the submission of proposals.

2.3 Preparation of Technical Proposal

2.3.1 The Consultants proposal shall be written in English language

2.3.2 In preparing the Technical Proposal, consultants are expected to examine the documents constituting this RFP in detail. Material deficiencies in providing the information requested may result in rejection of a proposal.

2.3.3 While preparing the Technical Proposal, consultants must give particular attention to the following:

- (i) If a firm considers that it does not have all the expertise for the assignment, it may obtain a full range of expertise by associating with individual consultant(s) and/or other firms or entities in a joint venture or sub-consultancy as appropriate. Consultants shall not associate with the other consultants invited for this assignment. Any firms associating in contravention of this requirement shall automatically be disqualified.
- (ii) For assignments on a staff-time basis, the estimated number of professional staff-time is given in the Appendix. The proposal shall however be based on the number of professional staff-time estimated by the firm.
- (iii) It is desirable that the majority of the key professional staff proposed be permanent employees of the firm or have an extended and stable working relationship with it.
- (iv) Proposed professional staff must as a minimum, have the experience indicated in Appendix, preferably working under conditions similar to those prevailing in Kenya.
- (v) Alternative professional staff shall not be proposed and only one Curriculum Vitae (CV) may be submitted for each position.

2.3.4 The Technical Proposal shall provide the following information using the attached Standard Forms;

- (i) A brief description of the firm's organization and an outline of recent experience on assignments of a similar nature. For each assignment the outline should indicate *inter alia*, the profiles of the staff proposed, duration of the assignment, contract amount and firm's involvement.
- (ii) Any comments or suggestions on the Terms of Reference, a list of services and facilities to be provided by the Client.
- (iii) A description of the methodology and work plan for performing the assignment.
- (iv) The list of the proposed staff team by specialty, the tasks that would be assigned to each staff team member and their timing.
- (v) CVs recently signed by the proposed professional staff and the authorized representative submitting the proposal. Key information should include number of years working for the firm/entity and degree of responsibility held in various assignments during the last ten (10) years.
- (vi) Estimates of the total staff input (professional and support staff staff-time) needed to carry out the assignment supported by bar chart diagrams showing the time proposed for each professional staff team member.
- (vii) A detailed description of the proposed methodology, staffing and monitoring of training, if Appendix "A" specifies training as a major component of the assignment.
- (viii) Any additional information requested in Appendix "A".

2.3.5 The Technical Proposal shall not include any financial information.

2.4 Preparation of Financial Proposal

2.4.1 In preparing the Financial Proposal, consultants are expected to take into account the requirements and conditions outlined in the RFP documents. The Financial Proposal should follow Standard Forms (Section D). It lists all costs associated with the assignment including; (a) remuneration for staff (in the field and at headquarters), and; (b) reimbursable expenses such as subsistence (per diem, housing), transportation (international and local, for mobilization and demobilization), services and equipment (vehicles, office equipment, furniture, and supplies), office rent, insurance, printing of documents, surveys, and training, if it is a major component of the assignment. If appropriate these costs should be broken down by activity.

2.4.2 The Financial Proposal should clearly identify as a separate amount, the local taxes, duties, fees, levies and other charges imposed under the law on the consultants, the sub-consultants and their personnel, unless Appendix "A" specifies otherwise.

2.4.3 Consultants shall express the price of their services in Kenya Shillings.

- 2.4.4 Commissions and gratuities, if any, paid or to be paid by consultants and related to the assignment will be listed in the Financial Proposal submission Form.
- 2.4.5 The Proposal must remain valid for 90 days after the submission date. During this period, the consultant is expected to keep available, at his own cost, the professional staff proposed for the assignment. The Client will make his best effort to complete negotiations within this period. If the Client wishes to extend the validity period of the proposals, the consultants shall agree to the extension.

2.5 Submission, Receipt, and Opening of Proposals

- 2.5.1 The original proposal (Technical Proposal and, if required, Financial Proposal; see para. 1.2) shall be prepared in indelible ink. It shall contain no interlineations or overwriting, except as necessary to correct errors made by the firm itself. Any such corrections must be initialed by the persons or person authorized to sign the proposals.
- 2.5.2 For each proposal, the consultants shall prepare the number of copies indicated in Appendix “A”. Each Technical Proposal and Financial Proposal shall be marked **“ORIGINAL”** or **“COPY”** as appropriate. If there are any discrepancies between the original and the copies of the proposal, the original shall govern.
- 2.5.3 The original and all copies of the Technical Proposal shall be placed in a sealed envelope clearly marked **“TECHNICAL PROPOSAL,”** and the original and all copies of the Financial Proposal in a sealed envelope clearly marked **“FINANCIAL PROPOSAL”** and warning: **“DO NOT OPEN WITH THE TECHNICAL PROPOSAL”**. Both envelopes shall be placed into an outer envelope and sealed. This outer envelope shall bear the submission address and other information indicated in the Appendix “ITC” and be clearly marked, **“DO NOT OPEN, EXCEPT IN PRESENCE OF THE OPENING COMMITTEE.”**
- 2.5.4 The completed Technical and Financial Proposals must be delivered at the submission address on or before the time and date stated in the Appendix “ITC”. Any proposal received after the closing time for submission of proposals shall be returned to the respective consultant unopened.
- 2.5.5 After the deadline for submission of proposals, the Technical Proposal shall be opened immediately by the opening committee. The Financial Proposal shall remain sealed and deposited with a responsible officer of the client department up to the time for public opening of financial proposals.

2.6 Proposal Evaluation General

- 2.6.1 From the time the bids are opened to the time the Contract is awarded, if any consultant wishes to contact the Client on any matter related to his proposal, he should do so in writing at the address indicated in the Appendix “ITC”. Any effort by the firm to influence the Client in the proposal evaluation, proposal comparison or Contract award decisions may result in the rejection of the consultant’s proposal.

2.6.2 Evaluators of Technical Proposals shall have no access to the Financial Proposals until the technical evaluation is concluded.

2.7 Evaluation of Technical Proposal

2.7.1 A tender evaluation Committee appointed by the Client shall evaluate the proposals on the basis of their responsiveness to the Terms of Reference, applying the evaluation criteria as follows:

	Points
(i) Specific experience of the consultant related to the assignment	(5-10)
(ii) Adequacy of the proposed work plan and methodology in responding to the terms of reference	(20-40)
(iii) Qualifications and competence of the key staff for the assignment	(30-40)
(iv) Suitability to the transfer of Technology Programme (Training)	(0-10)
Total Points	<u>100</u>

Each responsive proposal will be given a technical score (St). A proposal shall be rejected at this stage if it does not respond to important aspects of the Terms of Reference or if it fails to achieve the minimum technical score indicated in the Appendix "ITC".

2.8 Public Opening and Evaluation of Financial Proposal

2.8.1 After Technical Proposal evaluation, the Client shall notify those consultants whose proposals did not meet the minimum qualifying mark or were considered non-responsive to the RFP and Terms of Reference, indicating that their Financial Proposals will be returned after completing the selection process. The Client shall simultaneously notify the consultants who have secured the minimum qualifying mark, indicating the date and time set for opening the Financial Proposals and stating that the opening ceremony is open to those consultants who choose to attend. The opening date shall not be sooner than seven (7) days after the notification date. The notification may be sent by registered letter, cable, telex, facsimile or electronic mail.

2.8.2 The Financial Proposals shall be opened publicly in the presence of the consultants' representatives who choose to attend. The name of the consultant, the technical. Scores and the proposed prices shall be read aloud and recorded when the Financial Proposals are opened. The Client shall prepare minutes of the public opening.

2.8.3 The evaluation committee will determine whether the financial proposals are complete (i.e. whether the consultant has costed all the items of the corresponding Technical Proposal and correct any computational errors. The cost of any unpriced items shall be assumed to be included in other costs in the proposal. In all cases, the total price of the Financial Proposal as submitted shall prevail.

- 2.8.4 While comparing proposal prices between local and foreign firms participating in a selection process in financial evaluation of Proposals, firms incorporated in Kenya where indigenous Kenyans own 51% or more of the share capital shall be allowed a 10% preferential bias in proposal prices. However, there shall be no such preference in the technical evaluation of the tenders. Proof of local incorporation and citizenship shall be required before the provisions of this sub-clause are applied. Details of such proof shall be attached by the Consultant in the financial proposal.
- 2.8.5 The formulae for determining the Financial Score (Sf) shall, unless an alternative formulae is indicated in the Appendix "ITC", be as follows:- $Sf = 100 \times \frac{F_m}{F}$ where Sf is the financial score; F_m is the lowest priced financial proposal and F is the price of the proposal under consideration. Proposals will be ranked according to their combined technical (St) and financial (Sf) scores using the weights (T=the weight given to the Technical Proposal; P= the weight given to the Financial Proposal; $T + p = 1$) indicated in the Appendix. The combined technical and financial score, S, is calculated as follows: $S = St \times T \% + Sf \times P \%$. The firm achieving the highest combined technical and financial score will be invited for negotiations.
- 2.8.6 The tender evaluation committee shall evaluate the tender within 30 days of from the date of opening the tender.
- 2.8.7 Contract price variations shall not be allowed for contracts not exceeding one year (12 months).
- 2.8.8 Where contract price variation is allowed, the variation shall not exceed 10% of the original contract price
- 2.8.9 Price variation requests shall be processed by the procuring entity within 30 days of receiving the request.

2.9 Negotiations

- 2.9.1 Negotiations will be held at the same address as "address to send information to the Client" indicated in the Appendix "ITC". The aim is to reach agreement on all points and sign a contract.
- 2.9.2 Negotiations will include a discussion of the Technical Proposal, the proposed methodology (work plan), staffing, quoted prices and any suggestions made by the firm to improve the Terms of Reference. The Client and firm will then work out final Terms of Reference, staffing and bar charts indicating activities, staff periods in the field and in the head office, staff-months, logistics and reporting. The agreed work plan and final Terms of Reference will then be incorporated in the "Description of Services" and form part of the Contract. Special attention will be paid to getting the most the firm can offer within the available budget and to clearly defining the inputs required from the Client to ensure satisfactory implementation of the assignment.
- 2.9.3 Unless there are exceptional reasons, the financial negotiations will not involve the remuneration rates for staff (no breakdown of fees).

2.9.4 Having selected the firm on the basis of, among other things, an evaluation of proposed key professional staff, the Client expects to negotiate a contract on the basis of the experts named in the proposal. Before contract negotiations, the Client will require assurances that the experts will be actually available. The Client will not consider substitutions during contract negotiations unless both parties agree that undue delay in the selection process makes such substitution unavoidable or that such changes are critical to meet the objectives of the assignment. If this is not the case and if it is established that key staff were offered in the proposal without confirming their availability, the firm may be disqualified.

2.9.5 The negotiations will conclude with a review of the draft form of the Contract. To complete negotiations the Client and the selected firm will initial the agreed Contract. If negotiations fail, the Client will invite the firm whose proposal received the second highest score to negotiate a contract.

2.9.6 The procuring entity shall appoint a team for the purpose of the negotiations.

2.10 Award of Contract

2.10.1 The Contract will be awarded following negotiations. After negotiations are completed, the Client will promptly notify other consultants on the shortlist that they were unsuccessful and return the Financial Proposals of those consultants who did not pass the technical evaluation.

2.10.2 The selected firm is expected to commence the assignment on the date and at the location specified in Appendix "A".

2.10.3 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.

2.10.4 The procuring entity may at any time terminate procurement proceedings before contract award and shall not be liable to any person for the termination.

2.10.5 The procuring entity 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.

2.10.6 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.

2.11 Confidentiality

2.11.1 Information relating to evaluation of proposals and recommendations concerning awards shall not be disclosed to the consultants who submitted the proposals or to other persons not officially concerned with the process, until the winning firm has been notified that it has been awarded the Contract.

2.12 Corrupt or Fraudulent Practices

2.12.1 The procuring entity requires that the consultants observe the highest standards of ethics during the selection and award of the consultancy contract and also during the performance of the assignment. The tenderer shall sign a declaration that he has not and will not be involved in corrupt or fraudulent practices.

2.12.2 The procuring entity will reject a proposal for award if it determines that the consultant recommended for award has engaged in corrupt or fraudulent practices in competing for the contract in question.

2.12.3 Further a consultant who is found to have indulged in corrupt or fraudulent practices risks being debarred from participating in public procurement in Kenya.

Appendix to Information to Consultants

The following information for procurement of consultancy services and selection of consultants shall complement or amend the provisions of the information to consultants, wherever there is a conflict between the provisions of the information and to consultants and the provisions of the appendix, the provisions of the appendix herein shall prevail over those of the information to consultants.

Clause Reference

2.1 The name of the Client is: **Insurance Regulatory Authority (IRA)**

2.1.1 The method of selection is: **Quality Cost Based Selection**

2.1.2 Technical and Financial Proposals are requested: **Yes**

The name of the assignment: **Provision of Consultancy Services on Post-Retirement Medical Fund.**

The objectives of the assignment: **To design and recommend appropriate Post-Retirement Medical Fund for IRA Staff as per Terms of Reference.**

2.1.3 A pre-proposal conference will be held: **No**

The name(s), address (es) and telephone numbers of the Client's official(s) are:

Naomi Njoroge Human Capital Development Officer	Felix Chelimo Manager, Procurement
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**INSURANCE REGULATORY AUTHORITY,
10th Floor, Zep-Re Place, Longonot Road, Upperhill,
P.O. Box 43505-00100,
NAIROBI.**

Telephone: +254-20-49960200

E-mail: procurement@ira.go.ke

2.1.4 The Client will provide the following inputs:

Relevant documentation, assistance in carrying out the assignment.

2.3.3

(i) The estimated number of professional staff months required for the assignment is: **The assessment is expected to take a period of 10 weeks from the date of contracting with the service provider.**

(ii) The minimum required experience of proposed professional staff is:

a) The Lead consultant must be a qualified Actuary.

- b) The other support staff should have a Bachelor's degree and should demonstrate that they are pursuing Actuarial Studies and/or Post graduate Statistics.
- c) Proven working experience in fields relating directly to designing of medical schemes.

The firm will be required to demonstrated practical experience in designing, reviewing and implementing Post-Retirement Medical Fund as follows: -

- a) Interested firm must demonstrate experience in designing, reviewing and implementing Post-Retirement Medical Fund. The consultant shall provide a list of similar projects carried out and the status of the same projects.
- b) The consultant shall be required to provide an overview of their organization and outline the skills of the key personnel proposed to be involved in the assignment. This should include: -
 - (i) The proposed role of key personnel in the engagement
 - (ii) Curriculum vitae of the proposed lead consultant and support staff
 - (iii) Academic Qualifications
 - (iv) Professional Qualifications
 - (v) Membership of Professional bodies
 - (vi) Experience in the proposed assignment in the last 5 years
 - (vii) Any additional information
- c) The consultant should outline their proposed methodology and timeframe for designing, reviewing and implementing Post-Retirement Medical Fund which should include as minimum the following: -
 - (i) A project schedule / timeframe;
 - (ii) A clear methodology that demonstrates an understanding of the scope of work.
- d) Be registered Business /Company and you are required to submit Certificate of Registration/Incorporation;
- e) Poses a Valid Tax Compliance Certificate from Kenya Revenue Authority (KRA);
- f) Provide Company profile and other relevance documentation that demonstrate capability and capacity to undertake the assignment.
- g) The tender document should be prepared in paginated sequentially all pages.

2.3.4 Evaluation Criteria

The Authority will evaluate your proposal based on compliance with the requirements outlined below.

The following evaluation criteria will be applied.

a) Preliminary Evaluation

- i) Certificate of Registration/Incorporation
- ii) Valid Tax Compliance Certificate from Kenya Revenue Authority (KRA). This will be confirmed from the KRA portal.
- iii) Dully completed Confidential Business Questionnaire (MUST be filled, signed and stamped by authorized signatory).
- iv) Valid Single Business Permit from County Government (Attach License /payment receipt).
- v) Copies of Identification documents (IDs or Valid Passports) of the owners/Directors of the firms and a certified copy of the latest CR 12 issued by the Registrar of Companies.
- vi) The document should be legible and presentable. All pages of the bid document submitted **MUST** be sequentially serialized or paginated from the first to the last page.
- vii) Self-declaration form that the tenderer will **not** engage in any corrupt or fraudulent practice signed by the tenderer's authorized signatory.

b) Technical Evaluation

The following criteria will apply in the detailed technical evaluation stage: -

S/No	Item Description	Marks%
i)	Business Registration details, Valid Tax Compliance, Audited Financial statements, Business Questionnaire, submission of Separate Technical and Financial Proposals, Self-Declaration form (R 62)	Mandatory
ii)	Past Experience list of organizations where similar services have been provided in the last five (5) years from 5 clients. Please attach evidence in form of, contract, letters of offer or LSO's.	20
iii)	Provide reference letters from 5 clients	10
iv)	Key Personnel proposed for the assignment. Please attach copies of CVs, Academic and Professional qualifications/certificates to demonstrate qualification and experience to undertake the assignment.	35
v)	Work plan that details activities to be undertaken (time frame).	5
vi)	Provide a brief that indicates the approach and methodology that will be used in executing the assignment, comments on terms of reference.	30
	Total	100
	The minimum score to pass is 80%.	

The minimum technical score required to pass: **80%**.

The weights given to the Technical and Financial Proposals are:

T= 0.80

P= 0.20

a) Financial Evaluation

Each of the financial submissions will be divided by the lowest financial quote to determine the financial score of each bidder.

Weightage: This section will carry a total of 20 % of the overall evaluation score.

The formula for determining the financial scores is the following:

S_f = 100 x F_m/F, in which **S_f** is the financial score, **F_m** is the lowest price and **F** is the price of the proposal under consideration.

The single currency for price conversions is: Kenya Shillings

The source of official selling rates is: Central Bank of Kenya. The date of exchange rates is: the last date on which the proposal will be submitted.

b) Combined Technical and Financial Scores

The following formula shall be used: T.S (80%) + F.S (20 %) = T.T.L (100 %)

T.S = Technical Score (as evaluated above)

F.S = Financial Score (as evaluated above)

T.T.L = Total Score

2.4.2 Taxes: **All taxes are applicable.**

2.4.6 The Proposal must remain valid for 90 days after the submission date.

2.5.2 Consultants must submit original and copy of proposals in separate envelopes clearly marked.

2.5.3 The proposal submission address is:

**Insurance Regulatory Authority,
10thFloor, Zep Re Place, Longonot Road, Upperhill,
P.O. Box 43505-00100,
NAIROBI.
Telephone: +254-20-4996000
E-mail: procurement@ira.go.ke**

2.8.1 The invitation for opening of Financial proposal will be sent via email and the notice period will be within a period of 4 hours. Successful bidders are required to send passwords of their financial proposal for opening.

2.10.2 The assignment is expected to commence on **December, 2020.**

SECTION III: TECHNICAL PROPOSAL

Notes on the preparation of the Technical Proposals

- 3.1 In preparing the technical proposals the consultant is expected to examine all terms and information included in the RFP. Failure to provide all requested information shall be at the consultants' own risk and may result in rejection of the consultant's proposal.
- 3.2 The technical proposal shall provide all required information and any necessary additional information and shall be prepared using the standard forms provided in this Section.
- 3.3 The Technical proposal shall not include any financial information unless it is allowed in the Appendix to information to the consultants or the Special Conditions of contract.

SECTION III: TECHNICAL PROPOSAL

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1. TECHNICAL PROPOSAL SUBMISSION FORM *(in Company letterhead)*

[_____ *Date*]

**The Chief Executive Office
Insurance Regulatory Authority
10th Floor, Zep Re Place, Longonot Road, Upperhill,
P.O. Box 43505-00100
Nairobi, Kenya.**

Ladies/Gentlemen:

We, the undersigned, offer to provide the consulting services for _____
[*Title of consulting services*] in accordance with your
Request for Proposal dated _____[*Date*] and our Proposal. We are
hereby submitting our Proposal, which includes this Technical Proposal, [and a
Financial Proposal sealed under a separate envelope-*where applicable*].

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

We remain,

Yours sincerely,

[*Authorized Signature*]:

[*Name and Title of Signatory*]:

[*Name of Firm*]:

[*Address*]:

2. FIRM'S REFERENCES

Relevant Services Carried Out in the Last Five Years that Best Illustrate Qualifications

Using the format below, provide information on each assignment for which your firm either individually, as a corporate entity or in association, was legally contracted.

Assignment Name:		Country:
Location within Country:		Professional Staff provided by your Firm/Entity(profiles):
Name of Client:		Clients contact person for the assignment:
Client Address (<i>Postal & Telephone</i>):		No of Staff-Months; Duration of Assignment:
Start Date (Month/Year):	Completion Date (Month/Year):	Approx. Value of services (Kshs)
Name of Associated Consultants. If any:		No. of Months of Professional Staff provided by Associated Consultants:
Name of Senior Staff (Project Director/Coordinator, Team Leader) involved and functions performed:		
Narrative Description of project:		
Description of actual services provided by your staff:		

(Authorized representative)

Signature: _____

Full Name: _____

Title: _____ Date_____

3. COMMENTS AND SUGGESTIONS OF CONSULTANTS ON THE TERMS OF REFERENCE AND ON DATA, SERVICES AND FACILITIES TO BE PROVIDED BY THE CLIENT.

ON THE TERMS OF REFERENCE:

- 1.
- 2.
- 3.
- 4.
- 5.

ON THE DATA, SERVICES AND FACILITIES TO BE PROVIDED BY THE CLIENT:

- 1.
- 2.
- 3.
- 4.
- 5.

4. DESCRIPTION OF THE METHODOLOGY AND WORK PLAN FOR PERFORMING THE ASSIGNMENT

5. TEAM COMPOSITION AND TASK ASSIGNMENTS

1. Core Technical/Research Staff

Name	Position	Task

2. Support Staff

Name	Position	Task

6. FORMAT OF CURRICULUM VITAE (CV) FOR PROPOSED PROFESSIONAL STAFF

Proposed Position: _____

Name of Firm: _____

Name of Staff: _____

Profession: _____

Date of Birth: _____

Years with Firm: _____ Nationality: _____

Membership in Professional Societies: _____

Detailed Tasks Assigned: _____

Key Qualifications:

[Give an outline of staff member's experience and training most pertinent to tasks on assignment. Describe degree of responsibility held by staff member on relevant previous assignments and give dates and locations].

Education:

[Summarize college/ Company and other specialized education of staff member, giving names of schools, dates attended and degree[s] obtained.]

Employment Record:

[Starting with present position, list in reverse order every employment held. List all positions held by staff member since graduation, giving dates, names of employing organizations, titles of positions held, and locations of assignments.]

Certification:

I, the undersigned, certify that these data correctly describe me, my qualifications, and my experience.

_____ Date: _____
[Signature of staff member]

_____ Date; _____
[Signature of authorized representative of the firm]

Full name of staff member: _____

Full name of authorized representative: _____

7. TIME SCHEDULE FOR PROFESSIONAL PERSONNEL

[illegible]

Reports Due: _____

Activities Duration: _____

Signature: _____
(Authorized representative)

Full Name: _____

Title: _____

Address: _____

8. ACTIVITY (WORK) SCHEDULE

(a). Field Investigation and Study Items

[1st, 2nd, etc, are months from the start of assignment)

[illegible]

(b). Completion and Submission of Reports

Reports	Date
1. Inception Report	
4. Interim Progress Report (a) First Status Report (b) Second Status Report	
3. Draft Report	
4. Final Report	

9. CONFIDENTIAL BUSINESS QUESTIONNAIRE FORM

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

NB. Attach Company Registration Certificate or Certificate of Incorporation, Valid Tax Compliance certificate from Kenya Revenue Authority (KRA), Valid Single Business Permit from County Government, PIN Certificate with this form.

Part 1 - General:

Business Name
(Attach Copy of Registration Certificate/Certificate Incorporation)

Location of Business Premises

Plot No. Street/Road

Postal Address.....Tel. No. (Landline).....

Mobile Phone(s):.....

Website:..... E-mail:.....

Nature of Business

Current Single Business Permit from a Local Authority

No. Expiring Date
(Attach Copy of Valid permit)

V.A.T No.....
(Attach Copy of V.A.T Certificate)

Tax Compliance Certificate No..... Expiring Date.....
(Attach Copy of Valid Tax Compliance from Kenya Revenue Authority)

Maximum value of business which you can handle at any one time:
K£.....

Name of your bankers Branch

Part 2 (a) Sole Proprietor:

Your name in full Age
Nationality Country of origin
Citizenship details

Part 2 (b) Partnership

Give details of partners as follows:

	Name	Nationality	Citizenship Details	Shares
1.				
2.				

Part 2 (c) Registered Company:

Private or Public

State the nominal and issued capital of the company:-

Nominal K£

Issued K£

Give details of all Directors as follows:-

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

I certify that the above information is correct.

Authorized Signature..... **Date:**

Affix Rubber Stamp

10. SELF DECLARATION FORMS (r 62)
REPUBLIC OF KENYA
PUBLIC PROCUREMENT REGULATORY AUTHORITY (PPRA)
SELF DECLARATION THAT THE PERSON/TENDERER WILL NOT ENGAGE IN
ANY CORRUPT OR FRAUDULENT PRACTICE

I,of P. O. Box being a resident
of

..... in the Republic of do hereby
make a statement as follows:-

A. **THAT** I am the Chief Executive/Managing Director/Principal
Officer/Director of (*insert name of the*
Company) who is a Bidder in respect of **Tender No.** for
.....(*insert tender title/description*) for(*insert name of*
the Procuring entity) and duly authorized and competent to make this statement.

B. **THAT** the aforesaid Bidder, its servants and/or agents /subcontractors will not
engage in any corrupt or fraudulent practice and has not been requested to pay any
inducement to any member of the Board, Management, Staff and/or employees and/or
agents of(*insert name of the Procuring entity*) which is the procuring
entity.

C. **THAT** the aforesaid Bidder, its servants and/or agents /subcontractors have not
offered any inducement to any member of the Board, Management, Staff and/or
employees and/or agents of(*name of the procuring entity*)

D. **THAT** the aforesaid Bidder will not engage /has not engaged in any corrosive practice
with other bidders participating in the subject tender

E. **THAT** what is deponed to hereinabove is true to the best of my knowledge
information and belief.

.....
(Title) (Signature) (Date)

Bidder's Official Stamp

I certify that the above information is correct.

Authorized Signature..... Date:

Affix Rubber Stamp

SECTION IV: FINANCIAL PROPOSAL

Notes on preparation of Financial Proposal

1. The Financial proposal prepared by the consultant should list the costs associated with the assignment. These costs normally cover remuneration for staff, subsistence, transportation, services and equipment, printing of documents, surveys etc. as may be applicable. The costs should be broken down to be clearly understood by the procuring entity.
2. The financial proposal shall be in Kenya Shillings or any other currency allowed in the request for proposal and shall take into account the tax liability and cost of insurances specified in the request for proposal.
3. The financial proposal should be prepared using the Standard forms provided in this part

FINANCIAL PROPOSAL STANDARD FORMS

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1. FINANCIAL PROPOSAL SUBMISSION FORM (in Company letterhead)

_____ [Date]

**The Chief Executive Officer
Insurance Regulatory Authority
10th Floor, Zep Re Place, Longonot Road, Upperhill,
P.O. Box 43505-00100
Nairobi, Kenya.**

Ladies/Gentlemen:

We, the undersigned, offer to provide the consulting services for (_____) [*Title of consulting services*] in accordance with your Request for Proposal dated (_____) [*Date*] and our Proposal. Our attached Financial Proposal is for the sum of (_____) [*Amount in words and figures*] inclusive of the taxes.

We remain,

Yours sincerely,

:
_____ [*Authorized Signature*]

:
_____ [*Name and Title of Signatory*]:

: _____ [*Name of Firm*]

: _____ [*Address*]

2. SUMMARY OF COSTS

Costs	Currency(ies)	Amount(s)
Subtotal		
Taxes		
Total Amount of Financial Proposal		_____

3. BREAKDOWN OF PRICE PER ACTIVITY

Activity _____	No.:	Description:_____
Price Component		Amount(s)
Remuneration		
Reimbursable		
Miscellaneous Expenses		
Subtotal		_____

4. REAKDOWN OF REMUNERATION PER ACTIVITY

Activity No. _____ Name: _____				
Names	Position	Input (Staff months, days or hours as appropriate.)	Remuneration Rate	Amount
Regular staff (i) (ii)				
Consultants				
Grand Total				

5. REIMBURSABLES PER ACTIVITY

Activity No: _____ **Name:**_____

No.	Description	Unit	Quantity	Unit Price	Total Amount
1.	Air travel	Trip			
2	Road travel	Kms			
3.	Rail travel	Kms			
4.	Subsistence Allowance	Day			
	Grand Total				

6. MISCELLANEOUS EXPENSES

Activity No. _____ Activity Name: _____

No.	Description	Unit	Quantity	Unit Price	Total Amount
1.	Communication costs (telephone, telegram, telex)				
2.	Drafting, reproduction of reports				
3.	Equipment: computers etc.				
4	Software				
Grand Total					

SECTION V: TERMS OF REFERENCE

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SECTION V – TERMS OF REFERENCE – PROVISION OF CONSULTANCY SERVICES ON POST-RETIREMENT MEDICAL FUND

1. Background

The Insurance Regulatory Authority is a statutory government agency established under the Insurance Act (Amendment) 2006, CAP 487 of the Laws of Kenya to regulate, supervise and develop the insurance industry.

The Authority wishes to invite consultancy services for an establishment of a Post-Retirement Medical Fund (PRMF) for its staff members and their dependents to enable them access adequate, affordable and comprehensive healthcare in retirement.

2. Purpose of Consultancy

The purpose of consultancy is to design and recommend a feasible approach in setting up an implementable Post-Retirement Medical Fund which meets the objectives of all IRA Staff. The operational framework of the medical fund must have the components, which seek to provide a retirement healthcare solution to retired members of staff and their dependents with a view of meeting the objectives of the fund.

3. Objectives

The consultant will be required to assess post-retirement medical needs, estimating liability and advising on funding requirements as well as an operational design of the fund. The elements of the consultant to inter alia include: -

- (a) To propose a medical package to IRA staff that is adequate, affordable, sustainable, comprehensive and easy to administer.
- (b) Compliance with existing retirement benefits legal framework, including the Post-Retirement Medical Funds guidelines issued by the Retirement Benefits Authority.
- (c) Foster inclusivity and balances to diverse staff needs on retirement healthcare.

4. Scope of Services

The consultancy will involve undertaking the following: -

- (a) Conduct a review to be acquainted with the demographic and financial profiles of the Authority's staff.
- (b) Conduct a survey on staff to understand their needs and inclinations.
- (c) Study the existing staff retirement benefit scheme, insurance schemes and policies, National Hospital Insurance Fund (NHIF) and existing legal framework, including the provisions of the post-retirement medical funds guidelines published by the Retirement Benefits Authority(RBA) and possibility of synchronization of the PRMF with the existing staff retirement benefit scheme.
- (d) Advise the Authority on the optimal design and operation of the post-retirement medical fund including but not limited to setting up, eligibility, benefits access, design and structure of the fund, investment, guarantees, management and administration and any other necessary criteria.
- (e) Estimate the cost implications for provision of post-retirement medical benefits on different scenarios for the different categories of staff and advise on the viable funding options for covering the cost estimated.
- (f) Advise on tax implications based on the current tax regime on retirement arrangements, contributions restrictions and any other funding considerations.
- (g) Benchmark the proposed arrangement with other funds established for similar purpose and best practice.
- (h) Provide any other relevant guidance for the implementation of the post-retirement medical fund.

5. Expected Output/Deliverable

The Consultant will be required to complete the assignment within a period of 10 weeks. The Consultant will submit to IRA for approval of the following outputs which are provided as guide: -

- (a) Recommend with justifications an optimal design(s) of a post-retirement medical fund for Authority employees that complies with the existing legal framework.
- (b) Provide different benefit packages and cost estimates under this fund for the principal members & beneficiaries.
- (c) Advise on contribution levels required for different benefit packages, considering the various staff profiles.
- (d) Comment on other considerations including terms of service, affordability, existing financial commitments, incentives etc.

- (e) Provide a summary of staff feedback on the undertaken survey.
- (f) Present the final report to management and staff of the Authority.
- (g) A recommendation on the way forward.

The outputs and deliverables should take the following format: -

Outputs	Time Frame for Delivery
<u>Inception Report</u> to include <i>inter alia</i> the detailed proposed methodology and a Work Implementation Plan	Within 1 weeks of contract signature
<u>First Progress Report</u> to <i>inter alia</i> include: <ul style="list-style-type: none"> • Review of current status and other existing Post-Retirement Medical Fund • Initial Findings, Issues and proposed actions • The Post-Retirement Medical Fund proposed 	Within 3 weeks of contract signature
<u>Draft Final Report</u> to <i>inter alia</i> include: <ul style="list-style-type: none"> • Recommended Optimal Design(s) of PRMF • Implementation plan Draft PRMF to include: • A Description of the PRMF 	Within 6 weeks of contract signature
<u>Presentations of findings</u> to Contract Implementation Team, IRA Management Team, Staff and other Stakeholders	Within 7 weeks of contract signature
<u>Final Report</u> incorporating feedback from the IRA management and staff	Within 10 weeks of contract signature

6. Terms of Payment

- i. Twenty (20) percent of the Contract Price shall be paid on the commencement date and upon submission of the inception report.

- ii. Forty (40) percent of the lump-sum amount shall be paid upon submission of the draft final report.
- iii. Forty (40) percent of the lump-sum amount shall be paid upon submission acceptable final report.

SECTION VI - STANDARD FORMS OF CONTRACT

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SAMPLE CONTRACT FOR CONSULTING SERVICES

SMALL ASSIGNMENTS LUMP-SUM PAYMENTS

CONTRACT

This Agreement, [hereinafter called “the Contract”) is entered into this _____[Insert starting date of assignment], by and between _____[Insert Client’s name] of [or whose registered office is situated at]_____ [insert Client’s address]/(hereinafter called “the Client”) of the one part AND

_____ [Insert Consultant’s name] of [or whose registered office is situated at]_____ [insert Consultant’s address]/(hereinafter called “the Consultant”) of the other part.

WHEREAS the Client wishes to have the Consultant perform the services [hereinafter referred to as “the Services”, and

WHEREAS the Consultant is willing to perform the said Services,

NOW THEREFORE THE PARTIES hereby agree as follows:

1. Services

- (i) The Consultant shall perform the Services specified in Appendix A, “Terms of Reference and Scope of Services,” which is made an integral part of this Contract.
- (ii) The Consultant shall provide the personnel listed in Appendix B, “Consultant’s Personnel,” to perform the Services.
- (iii) The Consultant shall submit to the Client the reports in the form and within the time periods specified in Appendix C, “Consultant’s Reporting Obligations.”

2. Term

The Consultant shall perform the Services during the period commencing on _____ [Insert starting date] and continuing through to _____ [Insert completion date], or any other period(s) as may be subsequently agreed by the parties in writing.

3. Payment

A. Ceiling

For Services rendered pursuant to Appendix A, the Client shall pay the Consultant an amount not to exceed _____
[Insert amount]. This amount has been established based on the understanding that it includes all of the Consultant's costs and profits as well as any tax obligation that may be imposed on the Consultant.

B. Schedule of Payments

The schedule of payments is specified below (Modify in order to reflect the output required as described in Appendix C.)

Kshs _____ upon the Client's receipt of a copy of this Contract signed by the Consultant;

Kshs _____ upon the Client's receipt of the draft report, acceptable to the Client; and

Kshs _____ upon the Client's receipt of the final report, acceptable to the Client.

Kshs _____ Total

C. Payment Conditions

Payment shall be made in Kenya Shillings unless otherwise specified not later than thirty [30] days following submission by the Consultant of invoices in duplicate to the Coordinator designated in Clause 4 here below. If the Client has delayed payments beyond thirty (30) days after the due date hereof, simple interest shall be paid to the Consultant for each day of delay at a rate three percentage points above the prevailing Central Bank of Kenya's average rate for base lending.

4. Project Administration

A. Coordinator.

The Client designates _____[insert name] as Client's Coordinator; the Coordinator will be responsible for the coordination of activities under this Contract, for acceptance and approval of the reports and of other deliverables by the Client and for receiving and approving invoices for payment.

B. Reports.

The reports listed in Appendix C, "Consultant's Reporting Obligations," shall be submitted in the course of the assignment and will constitute the basis for the payments to be made under paragraph 3.

5. Project Performance Standards

The Consultant undertakes to perform the Services with the highest standards of professional and ethical competence and integrity. The Consultant shall promptly replace any employees assigned under this Contract that the Client considers unsatisfactory.

6. Confidentiality

The Consultant shall not, during the term of this Contract and within two years after its expiration, disclose any proprietary or confidential information relating to the Services, this Contract or the Client's business or operations without the prior written consent of the Client.

7. Ownership of Material

Any studies, reports or other material, graphic, software or otherwise prepared by the Consultant for the Client under the Contract shall belong to and remain the property of the Client. The Consultant may retain a copy of such documents and software.

8. Consultant not to be Engaged in certain Activities

The Consultant agrees that during the term of this Contract and after its termination the Consultant and any entity affiliated with the Consultant shall be disqualified from providing goods, works or services (other than the Services and any continuation thereof) for any project resulting from or closely related to the Services.

9. Insurance

The Consultant will be responsible for taking out any appropriate insurance coverage

10. Assignment

The Consultant shall not assign this Contract or sub-contract any portion of it without the Client's prior written consent.

11. Law Governing Contract and Language

The Contract shall be governed by the laws of Kenya and the language of the Contract shall be English Language.

**12. Dispute
Resolution**

Any dispute arising out of the Contract which cannot be amicably settled between the parties shall be referred by either party to the arbitration and final decision of a person to be agreed between the parties. Failing agreement to concur in the appointment of an Arbitrator, the Arbitrator shall be appointed by the chairman of the Chartered Institute of Arbitrators, Kenya branch, on the request of the applying party.

FOR THE CLIENT

FOR THE CONSULTANT

Full name; _____

Full name;_____

Title: _____

Title: _____

Signature;_____

Signature;_____

Date;_____

Date;_____

List of Appendices (Forming Part of the Contract)

Appendix A: -Terms of Reference and Scope of Services

Appendix B: -Consultant's Personnel

Appendix C: -Consultant's Reporting Obligations

Appendix D: -Tender Security

ANNEXES

ANNEX 1: 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

ANNEX 2: FORM RB 1

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 of20.....

SIGNED

Board Secretary