



EXPRESSION OF INTEREST (EOI)

IRA/142/2020-2021 - EXPRESSION OF INTEREST FOR PROVISION OF CONSULTANCY SERVICES TO CONDUCT NATIONAL CUSTOMER SATISFACTION SURVEY

1. Background

The Insurance Regulatory Authority is a state corporation established under the Insurance (Amendment) Act of 2006. The Authority's mandate is to regulate, supervise and develop the insurance industry in Kenya. The regulated members of the insurance industry are Insurance Agents, Insurance Brokers, Medical Insurance Providers, Insurers, Re-Insurers, Motor Assessors, Insurance Investigators, Surveyors, Loss Adjustors, Claim Settling Agents and Risk Managers.

The Authority therefore, has to keep abreast with the changing needs of both the market environment and its customer so as to respond appropriately in-service delivery. It is on this basis that the Authority has been conducting customer satisfaction surveys since 2009. The aim is to ensure that IRA remains focused and responsive to the ever-changing customer needs and preferences. In this regard, the Authority is desirous of hiring a consultant to conduct a national customer satisfaction survey for the Insurance Regulatory Authority with services offered by IRA. The objective is to establish customer satisfaction with IRA service delivery and their needs so as to develop an effective business strategy to increase its productivity.

2. Objective

The overall objective of the consultancy is to conduct a national level survey on customer satisfaction levels with the various services offered by IRA.

Specifically, the study will seek to:

- a) Establish customer understanding on the role and functions of IRA
- b) Establish the needs of IRA customers
- c) Determine the overall customer satisfaction with services offered by the Authority
- d) Determine customer satisfaction drivers and service delivery gaps
- e) Track the performance of IRA on customer satisfaction along various parameters
- f) Measure the population currently accessing quality and efficient Services from IRA
- g) Measure the population currently accessing information on IRA Services
- h) Measure the level of awareness about IRA
- i) Provide recommendations for the improvement of service delivery

3. Scope of services

The following outputs will be expected from the consultant.

1. A detailed proposal covering but not limited to: -
 - a) Background to the study
 - b) Statement of the problem
 - c) Purpose
 - d) Justification
 - e) Detailed methodology clearly demonstrating how the methodology chosen will address the study objectives
 - f) Sampling design and justification for the sampling design chosen
 - g) A skeleton of the appropriate study instrument (broad picture of what shall be covered)
 - h) Detailed work plan for carrying out the assignment
2. Inception report
3. Inception meeting with IRA to discuss, agree and document the Terms of Reference and the applicable Project Management (i.e. the survey) Framework/Structure
4. Develop appropriate data collection instruments for use and discuss with IRA. The instruments have to be approved by IRA for use.
5. Provide periodic updates to the client.
6. Provide the raw data in SPSS to IRA
7. Make a presentation of the report to IRA management and other relevant stakeholders; make appropriate amendments as may be necessary
8. Make presentation of the report to IRA staff, then make appropriate amendments as may be necessary with an aim of finalizing the report
9. Provide a final report both in soft and one bound hard copy. The report should be developed in the generally accepted report format and must contain but not limited to the following:
 - (i). Findings on each of the objectives
 - (ii). Specific conclusions drawn from the findings
 - (iii). Customer satisfaction gaps
 - (iv). Customer satisfaction index
 - (v). The level of awareness of the Insurance Regulatory Authority
 - (vi). Customer satisfaction/Service delivery drivers and ranking
 - (vii). Specific and implementable recommendations to improve service delivery
 - (viii). Lessons learnt – This includes what went well in the project implementation up to conclusion that may be replicated in future projects or what went wrong so that appropriate measures/strategies are put in place to avoid the same mistakes in future
10. Meeting with IRA project team to officially close the project and document

4. Eligibility criteria

The Expression of Interest must be accompanied by the consultants' qualifications, professional capabilities and documentary evidence of having successfully completed assignment/ project of similar nature. Interested firms should provide specific information which will be the basis for shortlisting and further invite to respond to comprehensive terms of reference as indicated below: -

a) Technical/Functional Skills

- (i). **Team leader:** Postgraduate degree in Economics or Commerce or Statistics or Demography plus over ten years of practical experience in managing/lead the design and development of Research/Surveys/Polls; five of which must be in conducting customer satisfaction surveys of national magnitude.

Note: Provide evidence of experience in undertaking customer satisfaction surveys.

- (ii). **Principal Data Analyst:** Post graduate degree in Statistics and at least five years' experience in using Statistical or Demographic information to manage field surveys and reporting

b) Mandatory requirements

- i) Submit a copy of certificate of incorporation/business registration.
- ii) Submit a valid tax compliance/ Exemption certificate from Kenya Revenue Authority.
- iii) Provide Company profile of the firm indicating the contact details including physical address, telephone number, email and contact person on behalf of the bidder.
- iv) Confidential business questionnaire.
- v) Copy of CR 12 for Limited companies.
- vi) Copy of certificate of registration with relevant regulatory bodies.
- vii) Self-declaration letter that the consultant is not debarred in the matters of Public Procurement and Asset Disposal Act, 2015.
- viii) Self-declaration that the person or tenderer will not engage in any corrupt or fraudulent practice.
- ix) Access to Government Procurement Opportunities (AGPO) Certificate from National Treasury where applicable

5. Clarifications

IRA shall promptly respond to all request for any clarification relating to expression of interest where such request is received before the deadline for submission. Any request for clarification must be sent in writing by electronic mailed to:

**Manager Procurement,
Insurance Regulatory Authority,
Zep-Re Place, Longonot Road, Upper hill,
P.O. Box 43505-00100
Nairobi, Kenya
Email: procurement@ira.go.ke**

6. Submission

Completed EOI proposal shall be submitted in ONE (1) "ORIGINAL hard copy and in CD/Flash Disk saved in PDF format clearly labelled your company name and placed in separate sealed envelopes The two envelopes shall be placed in an outer envelope and sealed bear IRA address, EoI name and number and clearly marked "DO NOT OPEN before day, date and time of EOI closing/Opening date.

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The pre-qualification application must be delivered (by hand or registered mail) to:

Tender Box at Insurance Regulatory Authority Offices on Ground Floor, Zep - Re Place, Longonot Road, Upperhill, Nairobi or 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: +254-20-4996000; 254-719-047000
Email: procurement@ira.go.ke; Website: <http://www.ira.go.ke>**

On or before: **10th March, 2021 at 11:00 a.m.** The EOI shall be opened immediately on **10th March, 2021 at 11:00 a.m.** and in the presence of tenderers’ representatives who choose to attend. in the presence of tenderers’ representatives who choose to attend strictly observing MOH protocols on Covid -19 Pandemic.

Only firms shortlisted under this procedure will be invited to submit their Technical and Financial proposals under the Request for Proposals (RFP).

CHIEF EXECUTIVE OFFICER/COMMISSIONER OF INSURANCE

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 Business Registration Certificate or Certificate of Incorporation, Valid Tax Compliance certificate from Kenya Revenue Authority (KRA), Access to Government Procurement Opportunities (AGPO) from the National Treasury (for firms owned by Youth, Women & persons with Disability)

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
Single Business Permit (from a County Government)

No. Expiring Date
(Attach Copy of Permit/ Payment Receipt)

PIN Certificate No.....
(Attach Copy of PIN 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.				

Part 3 – Declaration

I / We, the undersigned state and declare that the above information is correct and that I / We give IRA authority to seek any other references concerning my / our company and application from whatever sources deemed relevant.

Full name.....

Signature.....

For and on behalf of M/s.....

In the capacity of.....

Dated thisday of2021.

Suppliers' / Company's Official Rubber Stamp

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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: _____

**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: -

1. **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.
2. **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.
3. **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*)
4. **THAT** the aforesaid Bidder will not engage /has not engaged in any corruptive practice with other bidders participating in the subject tender
5. **THAT** what is deponed to hereinabove is true to the best of my knowledge information and belief.

Full name.....
Signature.....
Dated thisday of2021.

Suppliers' / Company's Official Rubber Stamp