



EXPRESSION OF INTEREST (EOI)

IRA/144/2020-2021 - EXPRESSION OF INTEREST FOR PROVISION OF CONSULTANCY SERVICES TO REVIEW THE INSURANCE CONSUMER EDUCATION STRATEGY

1. Background

The Insurance Regulatory Authority (IRA) is a State Corporation established under the Insurance Act, Cap 487 of the Laws of Kenya with the mandate to regulate, supervise and promote development of the insurance industry in Kenya.

In the Authority's Strategic Plan for the period 2018-2022, Consumer Protection and Education is identified as one of the key goals aimed at ensuring that consumers have desired information for making informed decisions. To achieve this goal, the Authority carries out various Consumer Education Awareness Programs to equip the populace with knowledge on insurance matters hence enabling them make informed decisions regarding insurance. In 2015 the Authority developed a Consumer Education Framework to guide the identification, designing, implementation and monitoring of Consumer Education activities for the period 2016- 2020. The framework gave a road map of how various insurance stakeholders and consumers could be reached and educated on insurance matters. The overall goal of the strategy is to positively influence Kenyans to purchase insurance and ultimately increase insurance penetration level in Kenya.

The period for implementing the strategy has come to an end and there is need to review and develop a new strategy. It is on this basis that the Authority has in the 2020-2021FY purposed to review the Consumer education strategy. The Authority seeking engage a reputable firm to undertake the review of the Consumer Education strategy.

2. Objective

The overall aim of the review is to develop a revised Consumer Education Strategy. The review is expected to assess the design of the consumer education strategy; implementation and; the results achieved through implementation in line with the specified expected results providing recommendations on areas of improvement so as to provide basis for development of a new consumer education strategy. The key indicators for review are: -

- a) Design – whether the strategy was developed based on best practices for strategy development;
- b) Effectiveness – whether strategy is producing the expected results;
- c) Efficiency – whether the strategy has been implemented using minimal resources;
- d) Sustainability – whether the strategy is implementable going forward;

- e) Relevance - whether the strategy is adequately aligned to the Authority's goals, mandate and the National agenda;
- f) Impact – the effect the strategy's programs/activities to IRA, Insurance industry, economy and the lives of programs beneficiaries.

3. Scope of services

Review the strategy as follows: -

- a) Assess the various components of the strategy for basis, clarity, adequacy and best practice including assessing the goals, objectives and performance indicators using SMART criteria;
- b) Identify any gaps in the strategy and advise the Authority;
- c) Determine the achievements of the Consumer Education strategy;
- d) Assess the factors that have affected the implementation of the strategy and realization of the intended goals and objectives either positively or negatively. For positive factors, analyze how these factors could be leveraged on for the sustainability of IRA Consumer Education programs while for negative factors provide viable solutions to enhance success of consumer education strategy;
- e) Analyse resource utilization in the execution strategy of the consumer education framework against the results achieved and provide viable options to the Authority to ensure minimal use of resources but with maximum results;
- f) Assess the alignment of the consumer education strategy to the Authority's Strategic focus and flexibility to emerging issues and provide guidance to the Authority;
- g) Assess the capacity of the Authority to implement the strategy in the long term and the extent to which results/ benefits realized will continue into the future;
- h) Identify intended and unintended outcome that resulted from implementation of the strategy's programs/activities for purposes of learning and accountability;
- i) Assess M & E framework for the strategy including identification of any gaps and provide guidance to the Authority going forward to ensure the M & E is more effective;
- j) Identify new channels and methodology of carrying out Consumer Education Programs and activities given the case of COVID-19;
- k) Document lessons learnt.

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

1. Minimum Requirements for Team Leader
 - i) Academic Qualifications
 - Advanced university degree in Social Sciences;
 - A minimum of 5 years of relevant experience in reviewing strategies, including participatory approaches, preferably of financial sector related projects and/or programs.

- ii) Competencies
 - In depth experience in strategy development, monitoring and review;
 - Familiarity with design and implementation of financial literacy programs in Kenya;
 - Understanding of the linkage between financial literacy, sectoral policy and the national policy;
 - Familiarity with financial sector project design, implementation and evaluation;
 - Prior experience in design and leading reviews or evaluations, data analysis skills;
 - Technical competence in the financial sector.
2. Qualifications of resource personnel e.g., university degree in fields related to accounting, actuarial science, business administration, economics, finance, insurance or law;
3. List of key staff relevant to the assignment and their profile; must be composed of relevant staff with a mix of appropriate expertise.
4. Submit evidence of experience in undertaking similar assignments
5. The proposed firm must demonstrate experience in conducting the assignment.

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 2.00 p.m.** The EOI shall be opened immediately on **10th March 2021 at 2.00 p.m.** and in the presence of tenderers’ representatives who choose to attend.

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