



EXPRESSION OF INTEREST (EOI)

IRA/105/2021-2022 - 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 Framework/Structure
4. Develop the study instruments the complete appropriate study 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 presentation of the report to IRA staff, then make appropriate amendments as may be necessary with an aim of finalizing the report
8. Make a presentation of the report to IRA management and other relevant stakeholders; make appropriate amendments as may be necessary
9. Provide a final report both in soft and one bound hard copy. The report should contain sub-reports of each of the surveys. Each report should be developed in the generally accepted report format and must contain but not limited to the following: -
 - a) Findings on each of the objectives
 - b) Specific conclusions drawn from the findings
 - c) Implementable recommendations
 - d) Satisfaction index of the various surveys
 - e) Staff competency level
 - f) Lessons learnt
10. Meeting with IRA project team to officially close the project and document

4. Eligibility criteria

The tender is targeted to the firms owned by Youth. However, it is also open to all other eligible bidders and margin of price preference will be awarded to the targeted group. 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: -

Technical/Functional Skills

i. Team leader

Academic Qualifications

- Postgraduate degree in Economics or Statistics or Demography or Social Sciences or equivalent.

Experience

- A minimum of 10 years of relevant experience in managing/leading the design and development of Research/Surveys/Polls
- At least 5 years of experience in conducting customer satisfaction surveys of national magnitude

ii) Other Team Members

Academic Qualifications

- University degree in Economics or Statistics or Demography or social Sciences or equivalent.

Experience

- A combination of team experience of undertaking ten customer satisfaction or market conduct surveys of national magnitude.

5. Evaluation Criteria

The following evaluation criteria will be applied based on **Pass** or **Fail** in each applicable item: -

a) Mandatory requirements

1.	Mandatory Requirements	Provided Yes/No
a)	Submit a copy of certificate of incorporation/business registration.	
b)	Submit a valid tax compliance/Exemption certificate from Kenya Revenue Authority	
c)	Provide Company profile of the firm indicating the contact details including physical address, telephone number, email and contact person on behalf of the bidder	
d)	Confidential business questionnaire	
e)	Copy of CR 12 for Limited companies issued within the last one year	
f)	Copy of certificate of registration with relevant regulatory bodies where applicable	
g)	Self-declaration letter that the consultant is not debarred in the matters of Public Procurement and Asset Disposal Act, 2015	
i)	Self-declaration that the person or tenderer will not engage in any corruption or fraudulent practice	
j)	A valid Access to Government Procurement Opportunities (AGPO) Certificate from National Treasury where applicable	
	Qualified / Not Qualified	

b) Qualification Criteria

1. Firms experience
2. Provision of relevant references
3. Qualification of Key Staff Proposed for the assignment
4. Proof of adequate resources to execute the assignment

6. 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**

7. 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.

“IRA/105/2021-2022 - EXPRESSION OF INTEREST FOR PROVISION OF CONSULTANCY SERVICES TO CONDUCT NATIONAL CUSTOMER SATISFACTION SURVEY”

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

Tender Box at Insurance Regulatory Authority Offices on 10th Floor, ZepRe 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: **8th March, 2022 at 10:00 a.m.** The EOI shall be opened immediately on **8th March, 2022 at 10:00 a.m.** and 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

TENDERER'S ELIGIBILITY-CONFIDENTIAL BUSINESS QUESTIONNAIRE

Instruction to Tenderer

Tenderer is instructed to complete the particulars required in this Form, *one form for each entity if Tender is a JV*. Tenderer is further reminded that it is an offence to give false information on this Form.

a) Tenderer's details

	ITEM	DESCRIPTION
1	Name of the Procuring Entity	
2	Reference Number of the Tender	
3	Date and Time of Tender Opening	
4	Name of the Tenderer	
5	Full Address and Contact Details of the Tenderer.	1. Country 2. City 3. Location 4. Building 5. Floor 6. Postal Address 7. Name and email of contact person.
6	Current Trade License Registration Number and Expiring date	
7	Name, country and full address (<i>postal and physical addresses, email, and telephone number</i>) of Registering Body/Agency	
8	Description of Nature of Business	
9	Maximum value of business which the Tenderer handles.	
10	State if Tenders Company is listed in stock exchange, give name and full address (<i>postal and physical addresses, email, and telephone number</i>) of state which stock exchange	

General and Specific Details

b) **Sole Proprietor**, provide the following details.

Name in full _____ Age _____
Nationality _____ Country of Origin _____
Citizenship _____

c) **Partnership**, provide the following details.

	Names of Partners	Nationality	Citizenship	% Shares owned
1				
2				
3				

d) **Registered Company**, provide the following details.

- (i) Private or public Company _____
(ii) State the nominal and issued capital of the Company

Nominal Kenya Shillings
(Equivalent).....

Issued Kenya Shillings
(Equivalent).....

- (iii) Give details of Directors as follows.

S/No	Names of Director	Nationality	Citizenship	% Shares owned
1				
2				
3				

e) **DISCLOSURE OF INTEREST - Interest of the Firm in the Procuring Entity.**

- i) are there any person/persons in.....(Name of Procuring Entity) who has/have an interest or relationship in this firm? Yes/ No.....

If yes, provide details as follows.

S/No	Names of Person	Designation in the Procuring Entity	Interest or Relationship with Tenderer
1			
2			
3			

ii) Conflict of interest disclosure

	Type of Conflict	Disclosure YES OR NO	If YES provide details of the relationship with Tenderer
1	Tenderer is directly or indirectly controls, is controlled by or is under common control with another tenderer.		
2	Tenderer receives or has received any direct or indirect subsidy from another tenderer.		
3	Tenderer has the same legal representative as another tenderer		
4	Tender has a relationship with another tenderer, directly or through common third parties, that puts it in a position to influence the tender of another tenderer, or influence the decisions of the Procuring Entity regarding this tendering process.		
5	Any of the Tenderer's affiliates participated as a consultant in the preparation of the design or technical specifications of the works that are the subject of the tender.		
6	Tenderer would be providing goods, works, non- consulting services or consulting services during implementation of the contract specified in this Tender Document.		
7	Tenderer has a close business or family relationship with a professional staff of the Procuring Entity who are directly or indirectly involved in the preparation of the Tender document or specifications of the Contract, and/or the Tender evaluation process of Such contract.		

8	Tenderer has a close business or family relationship with a professional staff of the Procuring Entity who would be involved in the implementation or supervision of the such Contract.		
9	Has the conflict stemming from such relationship stated in item 7 and 8 above been resolved in a manner acceptable to the Procuring Entity throughout the tendering process and execution of the Contract.		

f) Certification

On behalf of the Tenderer, I certify that the information given above is complete, current and accurate as at the date of submission.

Full Name _____ Title or Designation _____

(Signature)

(Date)

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.

[Signature of staff member]

Date: _____

[Signature of authorized representative of the firm]

Date: _____

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 of2022.

Suppliers' / Company's Official Rubber Stamp