



EXPRESSION OF INTEREST (EOI)

IRA/131/2021-2022 - EXPRESSION OF INTEREST FOR ASSESSMENT OF IMPACT OF CONSUMER EDUCATION PROGRAM

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 insurance consumers and potential consumers are well informed on insurance matters to enable them make informed decisions. To achieve this goal, the Authority carries out various programs dubbed Consumer Education Awareness Programs to equip the populace with knowledge and understanding on insurance matters. It is also expected that as more people become aware of insurance, behaviour towards uptake would improve. Attitude and perception towards insurance is also expected to improve.

The Authority has been carrying out consumer education since 2010 using a mix of approaches and mediums. A baseline survey on impact of consumer education activities was conducted in 2015 and insurance awareness index was determined at 67%. Since then, the Authority has been conducting annual impact assessment surveys to ascertain whether the intended objectives of consumer education activities are being met.

2. Objective

The key objective of the assessment is to ascertain the relevance, efficiency, effectiveness and sustainability of the awareness creation/outreach programs undertaken by IRA over the 2021/2022 FY in terms of achieving the desired results. Specifically, to;

- i. Measure the level of change:
 - insurance awareness from the previous impact assessment;
 - perception, attitude, knowledge and behaviour (in terms of purchasing or likelihood to purchase insurance) towards insurance attributed to the awareness campaigns;
 - awareness about the role of IRA attributed to the awareness campaigns and;
 - Peoples' ability to identify the risks they face;
 - Peoples' ability to make informed choices in regard to insurance matters.

- ii. Ascertain the intended and unintended consequences of the Authority's Consumer Education programs.
- iii. Identify emerging potential and current insurance consumers' information needs and expectations.
- iv. Identify opportunities and partnerships for the Authority to leverage on and enhance awareness creation.
- v. Generate detailed recommendations to inform enhancement of consumer education activities.

3. Scope of services

The consultant shall be expected to develop a detailed assessment framework that will be the criteria of: Relevance; Effectiveness; Efficiency; Impact; Sustainability to answer the specified objectives

The scope of the assessment shall be **July, 2020 to December, 2021**. The areas/activities for assessment are:

- a) Information Education and Communication (IEC) materials;
- b) Radio and TV infomercials;
- c) Training on procurement of insurance services;
- d) Training of Police officers;
- e) Training of insurance champions and focused groups;
- f) Boda Boda.

In terms of geographical coverage, the assessment will cover all the 47 counties and it is expected that the consultant will come up with an appropriate sampling framework to ensure that the sample is representative of the population in the 47 counties and that it is also representative of the specific target groups trained.

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.

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 contract

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/131/2021-2022 - EXPRESSION OF INTEREST FOR PROVISION OF CONSULTANCY SERVICES FOR ASSESSMENT OF IMPACT OF CONSUMER EDUCATION PROGRAM

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: **9th March, 2022 at 10:00 a.m.** The EOI shall be opened immediately on **9th March, 2022 at 10:00 a.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

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 ORNO	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.		
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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.

_____ 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 of2022.

Suppliers' / Company's Official Rubber Stamp