

EGERTON

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UNIVERSITY

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ADDENDUM NOTICE 1

16TH NOV,2021

Egerton University invites qualified and interested bidders via tender notice published on the Public Procurement Information Portal website <https://www.tenders.go.ke> and on the University website <https://www.egerton.ac.ke> dated 5th November,2021 for the following tenders:

Tender Number	Description	Eligibility
EU/ONT/FC/25/2021-2022	Provision of General Insurance (Fire And Peril /Motor Vehicle/Public Liability/Domestic Package/Theft & Burglary/Fidelity Guarantee)	Open
EU/ONT/FC/26/2021-2022	Provision of Insurance (Group Life/Group Personal Accident and WIBA)	Open

Kindly take note of the following clarification/addendum.

1. EU/ONT/FC/25/2021-2022: PROVISION OF GENERAL INSURANCE (FIRE AND PERIL /MOTOR VEHICLE/ PUBLIC LIABILITY/DOMESTIC PACKAGE/ THEFT & BURGLARY/FIDELITY GUARANTEE).

- That the Schedule of **Prices Form** and the **form of tender and Part ii-Schedule Of Insurance** requirements has been amended to include motor vehicle for Tegemeo Institute of Agricultural Policy and Development. (*attached*).
- That the evaluation criteria is therefore amended as shown below.
- The tender opening date has been changed from 22nd November,2021 to 30th November,2021 at 11.00 am EAT.
- Those who had already proceeded the tender security need not process new one. The validity of their tender security shall be calculated from the date of the initial tender opening.
- All other terms and conditions remain the same.

SECTION IV- TENDERING FORMS

1. Form of Tender

INSTRUCTIONS TO TENDERERS

- i) *The Tenderer must prepare this Form of Tender on stationery with its letterhead clearly showing the Tenderer's complete name and business address.*
- ii) *All italicized text is to help Tenderer in preparing this form.*
- iii) *Tenderer must complete and sign CERTIFICATE OF INDEPENDENT TENDER DETERMINATION and the SELF DECLARATION OF THE TENDERER and TENDERER'S ELIGIBILITY - CONFIDENTIAL BUSINESS QUESTIONNAIRE all attached to this Form of Tender.*
- iv) *The Form of Tender shall include the following Forms duly completed and signed by the Tenderer.*
 - a) *Tenderer's Eligibility-Confidential Business Questionnaire*
 - b) *Certificate of Independent Tender Determination*
 - c) *Self-Declaration of the Tenderer*

Date of this Tender submission: _____ [insert date (as day, month and year) of

Tender submission] **ITT No.:** _____ [insert number of ITT process]

1	2	3	4	5	6
No of item to be insured	Brief description of item to be insured	Sum assured Kshs	Insurance period	Insurance Premium per annum	Total Tender Price for Insurance Service for 2 years(Tender Price)
No 1	Fire & Allied perils	3,388,191,000	24 MONTHS		
No 2	Domestic Package	801,105,000	24 MONTHS		
No 3	Burglary & Theft	20,000,000	24 MONTHS		
No 4	Public Liability	5,000,000	24 MONTHS		
No 5	Motor Insurance-Third party	As per the attached	24 MONTHS		
No 6	MOTOR CYCLE THIRD PARTY	As per the attached	24 MONTHS		
No 7	Motor Insurance-private comprehensive	51,400,000.00	24 MONTHS		
No 8	Motor Insurance-Commercial Comprehensive	37,800,000.00	24 MONTHS		
No 9	TRACTORS THIRD PARTY	As per the attached	24 MONTHS		

No 10	Students Insurance Cover(Quote per student)	As a when need arises	24 MONTHS		
N 11	Staff on foreign travel	As a when need arises	24 MONTHS		
N 12	Motor Insurance-private comprehensive-Tegemeo Institute	19,282,578.00	24 MONTHS		
N.13	Motor Vehicle(Third Party-Tegemeo Fleet)-KAC 796B-Beige Colour	As per the attached	24 MONTHS		
N.14	Motorcycle (third Party-Tegemeo Fleet)-KBQ 886 D HONDA CGL 125	As per the attached	24 MONTHS		

To: _____ [insert complete name of Procuring Entity]

- a) **No reservations:** We have examined and have no reservations to the tendering document, including Addenda issued in accordance with ITT 9;
- b) **Eligibility:** We meet the eligibility requirements and have no conflict of interest in accordance with ITT 4;
- c) **Tender-Securing Declaration:** We have not been suspended nor declared ineligible by Egerton University based on execution of a Tender-Securing Declaration or Proposal-Securing Declaration in Kenya in accordance with ITT 21;
- d) **Conformity:** We offer to provide the Insurance Services in conformity with the tendering document of the following: [insert the list of items tendered for and a brief description of the Insurance Services];

SCHEDULE OF TENDERED ITEMS AND PRICES

N/B: In case the bidder is a broker, they are required to only choose only one (1) underwriter for all the classes/policies outlined above. Failure to comply shall render the tender non-responsive.

- e) **Discounts:** The discounts offered and the methodology for their application are:
 - i) The discounts offered are: [Specify in detail each discount offered.]
 - ii) The exact method of calculations to determine the net price after application of discounts is shown below: [Specify in detail the method that shall be used to apply the discounts];
- f) **Tender Validity Period:** Our Tender shall be valid for the period specified in TDS 19.1(as amended if applicable) from the date fixed for the Tender submission deadline (specified in TDS 23.1(as amended if applicable), and it shall remain binding upon us and may be accepted at any time before the expiration of that period;
- g) **Performance Security:** If our Tender is accepted, we commit to obtain a Performance Security in accordance with the tendering document;
- h) **One Tender Per Tenderer:** We are not submitting any other Tender (s) as an individual Tenderer, and we are not participating in any other Tender (s) as a Joint Venture member or as a subcontractor, and meet the requirements of ITT 4.3, other than alternative Tenders submitted in accordance with ITT 14;
- i) **Suspension and Debarment:** We, along with any of our subcontractors, suppliers, consultants, manufacturers, or insurance Providers for any part of the contract, are not subject to, and not controlled by any entity or individual

that is subject to, a temporary suspension or a debarment imposed by the PPRA. Further, we are not in eligible under Kenya's official regulations or pursuant to a decision of the United Nations Security Council;

- j) **State-owned enterprise or institution:** [select the appropriate option and delete the other] [We are not a state-owned enterprise or institution]/ [We are a state-owned enterprise or institution but meet the requirements of ITT 4.6];
- k) **Commissions, gratuities and fees:** We have paid, or will pay the following commissions, gratuities, or fees with respect to the Tendering process or execution of the Contract: [insert complete name of each Recipient, including Insurance Brokers, its full address, the reason for which each commission or gratuity was paid and the amount and currency of each such commission or gratuity,]

Name of Recipient	Address	Reason	Amount

(If none has been paid or is to be paid, indicate “none.”)

[Delete if not appropriate, or amend to suit] We confirm that we understand the provisions relating to Standstill Period as described in this tendering document and the Procurement Regulations.

- (m) **Binding Contract:** We understand that this Tender, together with your written acceptance thereof included in your Form of Acceptance, shall constitute a binding contract between us, until a formal contract is prepared and executed;
- (n) **Not Bound to Accept:** We understand that you are not bound to accept the lowest evaluated cost Tender, the Best Evaluated Tender or any other Tender that you may receive;
- (o) **Fraud and Corruption:** We here by certify that we have taken steps to ensure that no person acting for us or on our behalf engages in any type of Fraud and Corruption.
- (p) **Collusive practices:** We here by certify and confirm that the tender is genuine, non-collusive and made with the intention of accepting the contract if awarded. To this effect we have signed the “Certificate of Independent tender Determination” attached below; and
- (q) **Code of Ethical Conduct:** We under take to adhere by the Code of Ethics for Persons Participating in Public Procurement and Asset Disposal, copy available from (specify website) during the procurement process and the execution of any resulting contract.
- (r) We, the Tenderer, have completed fully and signed the following Forms as part of our Tender:
- (i) Tenderer's Eligibility; Confidential Business Questionnaire – to establish we are not in any conflict to interest.
 - (ii) Certificate of Independent Tender Determination – to declare that we completed the tender without colluding with other tenderers.
 - (iii) Self-Declaration of the Tenderer–to declare that we will, if awarded a contract, not engage in any form of fraud and corruption.
 - (iv) Declaration and commitment to the Code of Ethics for Persons Participating in

Public Procurement and Asset Disposal.

Further, we confirm that we have read and understood the full content and scope of fraud and corruption as informed in “Appendix 1-Fraud and Corruption” attached to the Form of

Tender. Name of the Tenderer: *[insert complete name of person signing the Tender]

Name of the person duly authorized to sign the Tender on behalf of the Tenderer:
**:..... [insert complete name of person duly authorized to sign the Tender]

Title of the person signing the Tender:..... [insert complete title of the person signing
the Tender] Signature of the person named above :..... [insert signature of person
whose name and capacity are shown above]

Date signed:..... [insert date of signing] day of [insert month],
[insert year].

A. TENDERER'S ELIGIBILITY-CONFIDENTIAL BUSINESS QUESTIONNAIRE

Instruction to Tenderer

Tender 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 Egerton University	
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	If a Kenyan tenderer, he/she has provided a current tax clearance certificate or tax exemption certificate issued by the the Kenya Revenue Authority.	
11	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 _____

c) **Partnership**, provide the following

	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.

	Names of Director	Nationality	Citizenship	% Shares owned
1				
2				
3				

e) **DISCLOSURE OF INTEREST**-Interest of the Firm in Egerton University .

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.

	Names of Person	Designation in Egerton	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		

	Type of Conflict	Disclosure YES OR NO	If YES provide details of the relationship with Tenderer
	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 Egerton University 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 Egerton University who would be involved in the implementation or supervision of the Contract.		
9	Has the conflict stemming from such relationship stated in item 7 and 8 above been resolved in a manner acceptable to Egerton University 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)

CERTIFICATE OF INDEPENDENT TENDER DETERMINATION

I, the undersigned, in submitting the accompanying Letter of Tender to the _____ [Name of Procuring Entity] for: _____ [Name and number of tender] in response to the request for tenders made by: _____ [Name of Tenderer] do hereby make the following statements that I certify to be true and complete in every respect:

I certify, on behalf of _____ [Name of Tenderer] that:

1. I have read and I understand the contents of this Certificate;
2. I understand that the Tender will be disqualified if this Certificate is found not to be true and complete in every respect;
3. I am the authorized representative of the Tenderer with authority to sign this Certificate, and to submit the Tender on behalf of the Tenderer;
4. For the purposes of this Certificate and the Tender, I understand that the word "competitor" shall include any individual or organization, other than the Tenderer, whether or not affiliated with the Tenderer, who:
 - a) Has been requested to submit a Tender in response to this request for tenders;
 - b) could potentially submit a tender in response to this request for tenders, based on their qualifications, abilities or experience;
5. The Tenderer discloses that [check one of the following, as applicable]:
 - a) The Tenderer has arrived at the Tender independently from, and without consultation, communication, agreement or arrangement with, any competitor;
 - b) The Tenderer has entered into consultations, communications, agreements or arrangements with one or more competitors regarding this request for tenders, and the Tenderer discloses, in the attached document (s), complete details thereof, including the names of the competitors and the nature of, and reasons for, such consultations, communications, agreements or arrangements;
6. In particular, without limiting the generality of paragraphs (5)(a) or (5)(b) above, there has been no consultation, communication, agreement or arrangement with any competitor regarding:
 - a) prices;
 - b) methods, factors or formulas used to calculate prices;
 - c) the intention or decision to submit, or not to submit, a tender; or
 - d) the submission of a tender which does not meet the specifications of the request for Tenders; except as specifically disclosed pursuant to paragraph (5)(b) above;
7. In addition, there has been no consultation, communication, agreement or arrangement with any competitor regarding the quality, quantity, specifications or delivery particulars of the works or services to which this request for tenders relates, except as specifically authorized by the procuring authority or as specifically disclosed pursuant to paragraph (5)(b) above;
8. The terms of the Tender have not been, and will not be, knowingly disclosed by the Tenderer, directly or indirectly, to any competitor, prior to the date and time of the official tender opening, or of the awarding of the Contract, whichever comes first, unless otherwise required by law or as specifically disclosed pursuant to paragraph (5)(b) above.

Name.....Title.....Date.....Sign.....

STAGE 1: MANDATORY EVALUATION FOR UNDERWRITERS ONLY

	<i>1. MANDATORY REQUIREMENTS</i>	YES/NO
1.	Must provide a copy of certificate of Incorporation/registration	
2.	Must provide Valid Tax Compliance Certificate from KRA	
3.	Must provide a certificate of registration from Insurance Regulatory Authority	
4.	Must provide a copy of CR 12 from registrar of companies, If Certificate of Registration, submit copies of director's ID(s)	
5.	Must provide valid and current Business License from the County where the Business is located	
6.	Properly filled, signed and stamped Tender Eligibility - Confidential Business Questionnaire In Format Provided in the prescribed manner in the tender document.	
7.	Attach Valid Evidence of membership from Association of Kenya Insurer's (AKI)	
8.	Attach Power of Attorney that the signatory of the tender is authorized to sign the Tender on behalf of the tenderer	
9.	Properly filled, signed and stamped form of tender in the prescribed format and instructions in the tender document	
10.	Original Tender security/ Bid bond of Kshs. 500,000.00 valid for 210 days from the date of tender opening, in form of a bank guarantee from a reputable bank recognized by the Central Bank of Kenya, payable to Procuring Entity	
11.	Must have paid up capital of 600 M for General Business.	
12.	MUST have handled fire industrial premiums of Kshs. 100M and Motor Vehicle of Kshs... 100M for the year 2020 (IRA reports)	
13.	Must provide valid audited financial Accounts for the two years (2020, 2019)	
14.	Must have annual gross premiums turnover of at least Ksh.2 Billion each in the last two years (2020 & 2019) with 25 % of this being from non- motor policies excluding medical business.	
15.	Must attach duly filled and signed self-declaration forms as provided in the tender documents (Form SD-1 and SD-2)	
16.	Original and copy: Presentation of the entire tender document with attachments in a logical manner-indicating table of content and page numbers and serialization of the entire tender document in format 1,2,3,4,5,6,...n	
17.	Must submit duly filled Declaration and Commitment to code of ethics form	
18.	Evidence of NHIF compliance; provide valid certificates certified by issuing body.	
19.	Evidence of NSSF compliance; provide valid certificates certified by issuing body	
20.	Properly filled, signed and stamped Certificate of Independent Tender Determination form in the format provided	
21.	Must submit duly filled price schedule in the format provided	
	<i>Underwriters who fail to meet any of each of the above MANDATORY REQUIREMENT will not proceed to Part B. Stage Two: Technical Evaluation</i>	

IMPORTANT NOTE:

N/B Underwriters with two or more subsidiary should attach documentary evidence of the above documents from the respective subsidiaries for both the life and general.

NB: Please note that the authenticity of the above documents provided MAY be verified with the relevant authority and any forgery or false presentation in any one of the above shall lead to automatic disqualification and render the tenderers bid non- responsive

EVALUATION CRITERIA FOR BROKERS ONLY

Interested brokers will be evaluated at the mandatory stage in two stages namely broker mandatory evaluation and part B. proposed underwriter mandatory evaluation stage.

PART 1 A. BROKER MANDATORY EVALUATION CRITERIA

Stage 1: A. Mandatory Evaluation

	<i>1. MANDATORY REQUIREMENTS</i>	YES/NO
1.	Must provide a copy of certificate of Incorporation/registration	
2.	Must provide Valid Tax Compliance Certificate from KRA	
3.	Must provide a certificate of registration from Insurance Regulatory Authority	
4.	Attach Valid Evidence of membership from Association of Insurance brokers of Kenya (AIBK)	
5.	Must provide a copy of CR 12 from registrar of companies, If Certificate of Registration, submit copies of director's ID(s)	
6.	Must provide valid and current Business License from the County where the Business is located	
7.	Properly filled, signed and stamped Tender Eligibility - Confidential Business Questionnaire In Format Provided in the prescribed manner in the tender document.	
8.	Attach Power of Attorney that the signatory of the tender is authorized to sign the Tender on behalf of the tenderer	
9.	Properly filled, signed and stamped form of tender in the prescribed format and instructions in the tender document	
10.	Original Tender security/ Bid bond of Kshs. 500,000.00 valid for 210 days from the date of tender opening, in form of a bank guarantee from a reputable bank recognized by the Central Bank of Kenya, payable to Procuring Entity	
11.	Attach duly signed authorization letter from the proposed underwriter for all the policies being tendered. (i. e this is a 1 broker 1 underwriter tender thus submission of two or more authorization letter from different underwriters shall lead to disqualification from further evaluation) N/B Underwriters with subsidiaries should provide authorization letter from respective subsidiary.	
12.	Must provide valid audited financial Accounts for the two years (2020, 2019)	
13.	Evidence of valid Professional Indemnity policy of at least Kshs.50 Million.	
14.	Must attach duly filled and signed self-declaration forms as provided in the tender documents (Form SD-1 and SD-2)	
15.	Original and copy: Presentation of the entire tender document with attachments in a logical manner-indicating table of content and page numbers and serialization of the entire tender document in format 1,2,3,4,5,6,...n	
16.	Must submit duly filled Declaration and Commitment to code of ethics form	
17.	Evidence of NHIF compliance; provide valid certificates certified by issuing body.	
18.	Evidence of NSSF compliance; provide valid certificates certified by issuing body	
19.	Properly filled, signed and stamped Certificate of Independent Tender Determination form in the format provided	
20.	Must submit duly filled price schedule in the format provided	
	<i>Bidders who fail to meet any of each of the above MANDATORY REQUIREMENT will not proceed to Part B.Underwriter mandatory evaluation</i>	

STAGE 1: B. MANDATORY EVALUATION FOR PROPOSED UNDERWRITER BY BROKER

All interested brokers must submit the following documents and furnish together with their bid copies the following document and shall form part of the mandatory documents from the PROPOSED/RECOMMENDED UNDERWRITER.

N/B Choose only one (1) underwriter for all the policies being tendered for herein.

	<i>I. MANDATORY REQUIREMENTS</i>	YES/NO
1.	Must provide a copy of certificate of Incorporation/registration	
2.	Must provide Valid Tax Compliance Certificate from KRA	
3.	Must provide a certificate of registration from Insurance Regulatory Authority (IRA)	
4.	Attach Valid Evidence of membership from Association of Kenya Insurer's (AKI)	
5.	Must provide a copy of CR 12 from registrar of companies, If Certificate of Registration, submit copies of director's ID(s)	
6.	Must attach duly filled and signed self-declaration forms as provided in the tender documents (Form SD-1 and SD-2)	
7.	Properly filled, signed and stamped Tender Eligibility - Confidential Business Questionnaire In Format Provided	
8.	Must have paid up capital of Kshs.600 M for General Business.	
9.	MUST have handled fire industrial premiums of Kshs. 100M and Motor Vehicle of Kshs. 100M for the year 2020	
10.	Must provide valid audited financial Accounts for the two years (2020, 2019)	
11.	Must have annual gross premiums turnover of at least Ksh.2 Billion each in the last two years (2020 & 2019) with 25 % of this being from non- motor policies excluding medical business.	
12.	Evidence of NHIF compliance; provide valid certificates certified by issuing body.	
13.	Evidence of NSSF compliance; provide valid certificates certified by issuing body	
	<i>Bidders who fail to meet any of each of the above MANDATORY REQUIREMENT will not proceed to Part Technical evaluation</i>	

IMPORTANT NOTE:

N/B Underwriters with two or more subsidiary should attach documentary evidence of the above documents from the respective subsidiaries for both the life and general.

NB: Please note that the authenticity of the above documents provided MAY be verified with the relevant authority and any forgery or false presentation in any one of the above shall lead to automatic disqualification and render the tenderers bid non- responsive.

Stage Two: Technical Evaluation (Total Points 100)

Conditions to be met by the Underwriter /Underwriter Proposed by the Broker in the technical evaluation.

TECHNICAL REQUIREMENTS

No.	General Requirement	Specific Requirement	Maximum Score
1.	Underwriter Current Experience	<p>i. Attach current copies of certified Contracts/award letters for the provision of FIRE AND PERIL COVER to 3 corporate clients each with annual premium of 10 million or above. Max score 9 marks Prorated as follows: $\frac{\text{No. of certified contracts} \times 9 \text{ marks}}{3}$</p> <p>ii. Attach reference /recommendation letter for the provision of FIRE AND PERIL COVER from 3 corporate clients attached above each. Max score 3 marks Prorated as follows: $\frac{\text{No. of certified contracts} \times 3 \text{ marks}}{3}$</p> <p>iii. Attach current copies of certified Contracts//award letters for the provision of MOTOR VEHICLE COVER to 5 corporate clients each with annual premium of 10 million or above. Max score 14 marks Prorated as follows: $\frac{\text{No. of certified contracts} \times 14 \text{ marks}}{5}$</p> <p>iv. Attach reference /recommendation letter for the provision of MOTOR VEHICLE COVER from 5 corporate clients attached above each. Max score 5 marks Prorated as follows: $\frac{\text{No. of certified contracts} \times 5 \text{ marks}}{5}$</p>	31
2	Underwriter Past Experience	<p>i. Attach certified copies of Past Contracts//award letters AND recommendation letters for the provision of FIRE AND PERIL /MOTOR VEHICLE/PUBLIC LIABILITY/DOMESTIC PACKAGE/THEFT & BURGLARY/FIDELITY GUARANTEE/GENERAL COVERS to 3 corporate clients each with annual cumulative premium of 30 million or above. Max score 15 marks Prorated as follows: $\frac{\text{No. of certified contracts} \times 15 \text{ marks}}{3}$</p>	15 marks
3.	Financial capacity	<p>Underwriting Profit of Kshs. 200M or above each year for the last two years (2020,2019) as per IRA Reports. Attach Extracts. Each year profit -6marks Prorated as follows: $\frac{\text{Yearly profit} \times 12 \text{ marks}}{2}$</p>	12 marks
4.	Human Capital	<p>Certified list of 5 key professional staff and their portfolio tasks (attach copies of CVs and certificates certified by a Commissioner of Oaths)</p> <ol style="list-style-type: none"> Principal officer as per IRA-5 marks <ul style="list-style-type: none"> Degree in business related field ACII or AIIK Minimum experience in Industry (10 years) Technical staff: -5 marks At least four with the following qualifications: <ul style="list-style-type: none"> Degree in Bachelor of Commerce (Insurance Option) or Actuarial science Or ACII/AIIK or its equivalent <p>Prorated as follows: $\frac{\text{No. of Technical Staff} \times 5 \text{ marks}}{4}$</p>	10 marks
5.	Claims	<p>Attach documentary evidence of claim settlement for Five claims above Kshs. 5 M each for the last two years (2020,2019)-2 marks per claim</p>	10 marks
6.	Credit Worthiness'	<p>Attach Current and valid reference letter from the firm's bankers demonstrating underwriters credit worthiness - 5 marks</p>	5 marks
7.	Reinsurance Arrangements	<p>Reinsurance approval letter from IRA Year 2021-5 marks</p>	5 marks
8	Credit Ratings	<p>Attach documentary evidence to proof current GCR with a rating of A- or A+- 5marks</p>	5 marks
	Total Score		93 Marks

The Pass mark for Technical Evaluation will be 80%. Candidates that will have attained those points will have their financial proposals evaluated.

NB: Please note that the authenticity of the above documents provided MAY be verified with the relevant authority and any forgery or false presentation in any one of the above shall lead to automatic disqualification and render the tenderers bid non- responsive.

STAGE THREE: FINANCIAL EVALUATION

Under this criterion responsive bidders from the Technical evaluation stage shall be Evaluated as follows. Submit copies of the following documents (Yes/No);

No.	Requirement	Y	No
1.	Attach proof of reinsurer treaty document for the year 2021 (i.e. Egerton University cover runs for a period of two years).- Mandatory		
2.	The Premium quoted must adhere to the recommended IRA guidelines and ratings. - Mandatory		
3.	Premium quoted for 2 years: The broker shall be required to ensure that the premium rates quoted are those filed and approved by IRA for 2021(applicable to broker only) . A copy of the certified premium <i>must be attached and certified by the Principal Officer of the Underwrite-applicable to Both broker/underwriter.</i>		
4.	A copy of certified premium attached in 3 above will be compared with the price schedule in the bid document dully filled and signed by the Broker to check for any arithmetic errors or oversight. Any arithmetic error will be considered as a MAJOR deviation affecting the substance of the tender and the tender will be considered non-responsive .		
5.	Tenders MUST Met the above 4 requirements for their bids to be ranked from the Lowest to the highest Bids. The underwriter/ broker that will submit the overall lowest evaluated premium will be considered for award. NB: The premiums rates quoted will be on a framework contract agreement and will be subject to propionate changes taking into cognizance of the addition and reduction of the number of items, sum insured/assured from time to time. N/B If there is a tie on the lowest quoted price between two firms, the University shall undertake competitive negotiation. The competitive negotiation will be in accordance with section 131-133 of the Public Procurement And Asset Disposal Act 2015.		

NOTE:

- i. Abnormally Low/ High Tenders will be rejected.**
- ii. In compliance with section 82 of the PPAD Act 2015, The tender sum as submitted and read out during the tender opening shall be absolute and final and shall not be the subject of correction, adjustment or amendment in any way by any person or entity.**

SCHEDULE OF PRICES FORM

[Egerton University shall fill in these Forms to indicate the List of Insurance Services required by Egerton University [Columns 1-4 and the Tenderer shall complete columns 5-7 as his /her Tender].

1	2	3	4	5	6	7	8
<i>No of items to be insured</i>	<i>Description of item to be insured</i>	<i>Value to be insured(kshs)</i>	<i>Major contingencies requiring insurance</i>	<i>Insurance period</i>	<i>Insurance premium per specified period(tender price)</i>	<i>Price discount (If any) (kshs)</i>	<i>Total tender price for insurance service (col.6-7) (kshs)</i>
No 1	Fire & Allied perils	3,388,191,000	<i>Refer to Part ii. Schedule of Insurance Requirements</i>	24 MONTHS			
No 2	Domestic Package	801,105,000	<i>Refer to Part ii. Schedule of Insurance Requirements</i>	24 MONTHS			
No 3	Burglary & Theft	20,000,000	<i>Refer to Part ii. Schedule of Insurance Requirements</i>	24 MONTHS			
No 4	Public Liability	5,000,000	<i>Refer to Part ii. Schedule of Insurance Requirements</i>	24 MONTHS			
No 5	Motor Insurance-Third party	As per the attached	<i>Refer to Part ii. Schedule of Insurance Requirements</i>	24 MONTHS			
No 6	MOTOR CYCLE THIRD PARTY	As per the attached	<i>Refer to Part ii. Schedule of Insurance Requirements</i>	24 MONTHS			

			<i>ents</i>				
No 7	Motor Insurance-private comprehensive	51,400,000.00	<i>Refer to Part ii. Schedule of Insurance Requirements</i>	24 MONTHS			
No 8	Motor Insurance-Commercial Comprehensive	37,800,000.00	<i>Refer to Part ii. Schedule of Insurance Requirements</i>	24 MONTHS			
No 9	TRACTOR S THIRD PARTY	As per the attached	<i>Refer to Part ii. Schedule of Insurance Requirements</i>	24 MONTHS			
No 10	Students Insurance Cover(Quote per student) – quote per student	As a when need arises	<i>Refer to Part ii. Schedule of Insurance Requirements</i>	24 MONTHS			
N 11	Staff on foreign travel-quote per person	As a when need arises	<i>Refer to Part ii. Schedule of Insurance Requirements</i>	24 MONTHS			
N 12	Motor Insurance-private comprehensive-Tegemeo Institute	19,282,578.00	<i>Refer to Part ii. Schedule of Insurance Requirements</i>	24 MONTHS			
N.13	Motor Vehicle (Third Party-Tegemeo Fleet)-KAC 796B-Beige Colour	1 pc	<i>Refer to Part ii. Schedule of Insurance Requirements</i>	24 MONTHS			
N.14	Motorcycle (third Party-Tegemeo Fleet)-KBQ 886 D HONDA CGL 125	1 pc	<i>Refer to Part ii. Schedule of Insurance Requirements</i>	24 MONTHS			

N/B: In case the bidder is a broker, they are required to only choose only one (1) underwriter for all the classes/policies outlined above. Failure to comply shall render the tender non-responsive.

Name of Tenderer*[insert complete name of Tenderer]*

Signature of Tenderer..... *[signature of person signing the Tender]*

Date..... *[insert date]*

2. EU/ONT/FC/26/2021-2022: PROVISION OF INSURANCE (GROUP LIFE/GROUP PERSONAL ACCIDENT AND WIBA)

Kindly take note of the following clarification/addendum

- a) That the evaluation criteria is therefore amended as shown below.
- b) The tender opening date has been changed from 22nd November,2021 to 30th November,2021 at 11.00 am EAT.
- c) Those who had already proceeded the tender security need not process new one. The validity of their tender security shall be calculated from the date of the initial tender opening.
- d) All other terms and conditions remain the same.

SECTION III - EVALUATION AND QUALIFICATION CRITERIA

1. General Provision

Wherever a Tenderer is required to state a monetary amount, Tenderers should indicate the Kenya Shilling equivalent using the rate of exchange determined as follows:

- a) For business turn over or financial data required for each year - Exchange rate prevailing on the last day of the respective calendar year (in which the amounts for that year is to be converted) was originally established.
- b) Value of single Contract-Exchange rate prevailing on the date of the contract signature.
- c) Exchange rates shall be taken from the publicly available source identified in the ITT. Any error in determining the exchange rates in the Tender may be corrected by Egerton University .

This section contains the criteria that the Employer shall use to evaluate tender and qualify tenderers. No other factors, methods or criteria shall be used other than specified in this tender document. The Tenderer shall provide all the information requested in the forms included in Section IV, Tendering Forms. Egerton University should use the Standard Tender Evaluation Report for Goods and Works for evaluating Tenders.

Evaluation and contract award Criteria

Egerton University shall use the criteria and methodologies listed in this Section to evaluate tenders and arrive at the Lowest Evaluated Tender. The tender that (i) meets the qualification criteria, (ii) has been determined to be substantially responsive to the Tender Documents, and (iii) is determined to have the Lowest Evaluated Tender price shall be selected for award of contract.

2. Preliminary examination for Determination of Responsiveness

Egerton University will start by examining all tenders to ensure they meet in all respects the eligibility criteria and other requirements in the ITT, and that the tender is complete in all aspects in meeting the requirements of "Part2-Procuring Entity's Insurance Requirements", including checking for tenders with unacceptable errors, abnormally low tenders, abnormally high tenders and tenders that are incomplete. The Standard Tender Evaluation Report for Goods and Works for evaluating Tenders provides clear guidelines on how to deal with review of these requirements. Tenders that do not pass the Preliminary Examination will be considered irresponsive and will not be considered further.

Preliminary Evaluation Criteria

STAGE 1: MANDATORY EVALUATION FOR UNDERWRITERS ONLY

	<i>1. MANDATORY REQUIREMENTS</i>	YES/NO
1.	Must provide a copy of certificate of Incorporation/registration	
2.	Must provide Valid Tax Compliance Certificate from KRA	
3.	Must provide a certificate of registration from Insurance Regulatory Authority	
4.	Must provide a copy of CR 12 from registrar of companies, If Certificate of Registration, submit copies of director's ID(s)	
5.	Must provide valid and current Business License from the County where the Business is located	
6.	Properly filled, signed and stamped Tender Eligibility - Confidential Business Questionnaire In Format Provided in the prescribed manner in the tender document.	
7.	Attach Power of Attorney that the signatory of the tender is authorized to sign the Tender on behalf of the tenderer	
8.	Properly filled, signed and stamped form of tender in the prescribed format and instructions in the tender document	
9.	Must provide a certificate of registration from Insurance Regulatory Authority (IRA)-Must be registered to undertake the quoted classes of insurance (to be confirmed IRA website)	
10.	Original Tender security/ Bid bond of Kshs. 500,000.00 valid for 210 days from the date of tender opening, in form of a bank guarantee from a reputable bank recognized by the Central Bank of Kenya, payable to Procuring Entity	
11.	Must provide valid audited financial Accounts for the three years (2020, 2019, 2018)	
12.	Must have annual gross premiums turnover of at least Ksh.2 Billion each in the last two years (2020 & 2019) with 30 % of this being from non-motor policies excluding medical business.	
13.	Must attach duly filled and signed self-declaration forms as provided in the tender documents (Form SD-1 and SD-2)	
14.	Original and copy: Presentation of the entire tender document with attachments in a logical manner-indicating table of content and page numbers and serialization of the entire tender document in format 1,2,3,4,5,6,...n	
15.	Must submit duly filled Declaration and Commitment to code of ethics form	
16.	Evidence of NHIF compliance; provide valid certificates certified by issuing body.	
17.	Evidence of NSSF compliance; provide valid certificates certified by issuing body	
18.	Properly filled, signed and stamped Certificate of Independent Tender Determination form in the format provided	
19.	Must submit duly filled price schedule in the format provided	
	<i>Underwriters who fail to meet any of each of the above MANDATORY REQUIREMENT will not proceed to Part B. Stage Two: Technical</i>	

IMPORTANT NOTE:

N/B Underwriters with two or more subsidiary should attach documentary evidence of the above documents from the respective subsidiaries for both the life and general.

NB: Please note that the authenticity of the above documents provided MAY be verified with the relevant authority and any forgery or false presentation in any one of the above shall lead to automatic disqualification and render the tenderers bid non-responsive

EVALUATION CRITERIA FOR BROKERS ONLY

Interested brokers will be evaluated at the mandatory stage in two stages namely broker mandatory evaluation and part B. proposed underwriter mandatory evaluation stage.

PART 1 A. BROKER MANDATORY EVALUATION CRITERIA

Stage 1: A. Mandatory Evaluation

	<i>1. MANDATORY REQUIREMENTS</i>	YES/NO
1.	Must provide a copy of certificate of Incorporation/registration	
2.	Must provide Valid Tax Compliance Certificate from KRA	
3.	Must provide a certificate of registration from Insurance Regulatory Authority	
4.	Attach Valid association of insurance brokers of Kenya (AIBK) Certificate For 2021 –to be certified by issuing body	
5.	Must provide a copy of CR 12 from registrar of companies, If Certificate of Registration, submit copies of director's ID(s)	
6.	Must provide valid and current Business License from the County where the Business is located	
7.	Properly filled, signed and stamped Tender Eligibility - Confidential Business Questionnaire In Format Provided in the prescribed manner in the tender document.	
8.	Attach Power of Attorney that the signatory of the tender is authorized to sign the Tender on behalf of the tenderer	
9.	Properly filled, signed and stamped form of tender in the prescribed format and instructions in the tender document	
10.	Original Tender security/ Bid bond of Kshs. 500,000.00 valid for 210 days from the date of tender opening, in form of a bank guarantee from a reputable bank recognized by the Central Bank of Kenya, payable to Procuring Entity	
11.	Attach duly signed authorization letter from the proposed underwriter for all the policies being tendered. (i. e this is a 1 broker 1 underwriter tender thus submission of two or more authorization letter from different underwriters shall lead to disqualification from further evaluation) N/B Underwriters with subsidiaries should provide authorization letter from respective subsidiary.	
12.	Must provide valid audited financial Accounts for the three years (2020, 2019, 2018)	
13.	Evidence of valid Professional Indemnity policy of at least Kshs.50 Million.	
14.	Must attach duly filled and signed self-declaration forms as provided in the tender documents (Form SD-1 and SD-2)	
15.	Original and copy: Presentation of the entire tender document with attachments in a logical manner-indicating table of content and page numbers and serialization of the entire tender document in format 1,2,3,4,5,6,...n	
16.	Must submit duly filled Declaration and Commitment to code of ethics form	
17.	Evidence of NHIF compliance; provide valid certificates certified by issuing body.	
18.	Evidence of NSSF compliance; provide valid certificates certified by issuing body	
19.	Properly filled, signed and stamped Certificate of Independent Tender Determination form in the format provided	
20.	Must submit duly filled price schedule in the format provided	
	<i>Bidders who fail to meet any of each of the above MANDATORY REQUIREMENT will not proceed to Part B.Underwriter mandatory evaluation</i>	

STAGE 1: B. MANDATORY EVALUATION FOR PROPOSED UNDERWRITER BY BROKER

All interested brokers must submit the following documents and furnish together with their bid copies the following document and shall form part of the mandatory documents from the PROPOSED/RECOMMENDED UNDERWRITER.

N/B Choose only one (1) underwriter for all the policies being tendered for herein.

	<i>I. MANDATORY REQUIREMENTS</i>	YES/NO
1.	Must provide a copy of certificate of Incorporation/registration	
2.	Must provide Valid Tax Compliance Certificate from KRA	
3.	Must provide a certificate of registration from Insurance Regulatory Authority (IRA)- Must be registered to undertake the quoted classes of insurance (to be confirmed IRA website)	
4.	Registration as a member of AKI for the year 2021 (attach an AKI certified and stamped copy of certificate)	
5.	Must provide a copy of CR 12 from registrar of companies, If Certificate of Registration, submit copies of director's ID(s)	
6.	Must attach duly filled and signed self-declaration forms as provided in the tender documents (Form SD-1 and SD-2)	
7.	Properly filled, signed and stamped Tender Eligibility - Confidential Business Questionnaire In Format Provided	
8.	Must have paid up capital of 600 M for General And Life 400M OR composite of 1 billion.	
9.	Must provide valid audited financial Accounts for the two years (2020, 2019)	
10.	Must have annual gross premiums turnover of at least Ksh.2 Billion each in the last two years (2020 & 2019) with 30 % of this being from non- motor policies excluding medical business.	
11.	Evidence of NHIF compliance; provide valid certificates certified by issuing body.	
12.	Evidence of NSSF compliance; provide valid certificates certified by issuing body	
	<i>Bidders who fail to meet any of each of the above MANDATORY REQUIREMENT will not proceed to Part Technical evaluation</i>	

IMPORTANT NOTE:

N/B Underwriters with two or more subsidiary should attach documentary evidence of the above documents from the respective subsidiaries for both the life and general.

NB: Please note that the authenticity of the above documents provided MAY be verified with the relevant authority and any forgery or false presentation in any one of the above shall lead to automatic disqualification and render the tenderers bid non- responsive.

Stage Two: Technical Evaluation (Total Points 100)

Conditions to be met by the Underwriter / Underwriter Proposed by the Broker in the technical evaluation.

TECHNICAL REQUIREMENTS

No.	General Requirement	Specific Requirement	Maximum Score
1.	Underwriter Current	<p>i. Attach current copies of certified Contracts for the provision of WIBA cover to 3 corporate clients each with annual premium of 10 million or above. Max score 9 marks Prorated as follows: $\frac{\text{No. of certified contracts} \times 9 \text{ marks}}{3}$</p> <p>ii. Attach reference /recommendation letter for the provision of WIBA cover from 3 corporate clients attached above each. Max score 3 marks Prorated as follows: $\frac{\text{No. of certified contracts} \times 3 \text{ marks}}{3}$</p> <p>iii. Attach current copies of certified Contracts for the provision of GPA/GL cover to 5 corporate clients each with annual premium of 25 million or above. Max score 14 marks Prorated as follows: $\frac{\text{No. of certified contracts} \times 14 \text{ marks}}{5}$</p> <p>iv. Attach reference /recommendation letter for the provision of GPA/GL cover from 5 corporate clients attached above each. Max score 5 marks Prorated as follows: $\frac{\text{No. of certified contracts} \times 5 \text{ marks}}{5}$</p>	31
2	Underwriter Past Experience	<p>i. Attach certified copies of Past Contracts AND recommendation letters for the provision of WIBA/GPA/GL covers to 3 corporate clients each with annual cumulative premium of 30 million or above. Max score 10 marks Prorated as follows: $\frac{\text{No. of certified contracts} \times 10 \text{ marks}}{2}$</p>	10 marks
3.	Financial capacity	<p>Group Life Premiums of Kes. 800M, each year for the last two years (2020 and 2019) as per IRA reports -10 marks per year max 20 marks</p> <p>Profitability –The company MUST have made profits for the last two years as per IRA Reports.-10marks</p>	30 marks
4.	Human Capital	<p>Certified list of 5 key professional staff and their portfolio tasks (attach copies of CVs and certificates certified by a Commissioner of Oaths)</p> <p>1. Principal officer as per IRA-5 marks</p> <ul style="list-style-type: none"> • Degree in business related field • ACII or AIIK • Minimum experience in Industry (10 years) <p>2. Technical staff: -5 marks</p> <p>At least four with the following qualifications:</p> <ul style="list-style-type: none"> • Degree in Bachelor of Commerce (Insurance Option) or Actuarial science • Or ACII/AIIK or its equivalent <p>Prorated as follows: $\frac{\text{No. of Technical Staff} \times 5 \text{ marks}}{4}$</p>	10 marks
5.	Claims	Attach documentary evidence of claim settlement for Five claims above Kes. 5 M each for the last three years (2020,2019,2018)- 1 marks per claim	5 marks
6.	Credit Worthiness'	Attach Current and valid reference letter from the firm's bankers demonstrating underwriters credit worthiness - 5 marks	5 marks

7.	Reinsurance Arrangements	Reinsurance approval letter from IRA Year 2021-2 marks	4 marks
		Reinsurance treaty year 2021-2 marks	
8	Credit Ratings	Attach documentary evidence to proof current GCR with a rating of A- or A+	5marks
	Total score		100

The Pass mark for Technical Evaluation will be 80%. Candidates that will have attained those points will have their financial proposals evaluated.

NB: Please note that the authenticity of the above documents provided MAY be verified with the relevant authority and any forgery or false presentation in any one of the above shall lead to automatic disqualification and render the tenderers bid non- responsive.

STAGE THREE: FINANCIAL EVALUATION

Under this criterion responsive bidders from the Technical evaluation stage shall be Evaluated as follows.

Submit copies of the following documents (Yes/No);

No.	Requirement	Yes	No
1.	Attach proof of reinsurer treaty document for the year 2021 (i.e. Egerton University cover runs for a period of two years).- Mandatory		
2.	The Premium quoted must adhere to the recommended IRA guidelines and ratings. - Mandatory		
3.	Premium quoted for 2 years: The broker shall be required to ensure that the premium rates quoted are those filed and approved by IRA for 2021. A copy of the certified premium <i>must be attached and certified by the Principal Officer of the Underwriter.</i>		
4.	A copy of certified premium attached in 3 above will be compared with the price schedule in the bid document dully filled and signed by the underwriter /Broker to check for any arithmetic errors or oversight. Any errors in the submitted tender arising from a miscalculation of unit price, quantity, subtotal and total bid price shall be considered as a major deviation that affects the substance of the tender and shall lead to disqualification of the tender as non- responsive		

5.	<p>Tenders MUST Met the above 4 requirements for their bids to be ranked from the Lowest to the highest Bids.</p> <p>The underwriter/ broker that will submit the overall lowest evaluated premium will be considered for award.</p> <p>NB: The premiums rates quoted will be on a framework contract agreement and will be subject to propionate changes taking into cognizance of the addition and reduction of the number of items, sum insured/assured from time to time.</p> <p>N/B If there is a tie on the lowest quoted price between two firms, the University shall undertake competitive negotiation.</p> <p>The competitive negotiation will be in accordance with section 131-133 of the Public Procurement And Asset Disposal Act 2015.</p>		
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NOTE:

- i. Abnormally Low/ High Tenders will be rejected.**
- ii. In compliance with section 82 of the PPAD Act 2015, The tender sum as submitted and read out during the tender opening shall be absolute and final and shall not be the subject of correction, adjustment or amendment in any way by any person or entity.**

Thank you.



**Head of Procurement Department
FOR VICE CHANCELLOR**