



**YOUTH ENTERPRISE DEVELOPMENT FUND**

**P.O.BOX 48610-00100**

**YEDF/TENDER/002/2021-2022**

**RECEIPT NO.....**

**TENDER FOR PROVISION OF MEDICAL INSURANCE  
COVER FOR STAFF AND BOARD MEMBERS  
(OPEN TO UNDERWRITERS ONLY)**

**NB: SEALED BIDS TO BE RETURNED NOT LATER THAN  
MONDAY 7<sup>TH</sup> JUNE, 2021 AT 10.30AM**

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## SECTION I - INVITATION FOR TENDERS

### **OPEN TENDER NO. YEDF/TENDER/002/2021-2022: FOR PROVISION OF MEDICAL INSURANCE COVER FOR STAFF AND BOARD MEMBERS.**

Youth Enterprise Development Fund (YEDF) hereby invites tenderers (**Insurance Underwriters**) to submit sealed tenders for the provision of Medical Insurance Cover **for a period of ONE YEAR.**

The Tender documents detailing the requirements will be obtained from Procurement Office, 4th floor, Renaissance Corporate Park, Elgon Road, Upper hill, Nairobi on working days between 8.00 am and 5.00 pm, upon payment of a non-refundable fee of Ksh.2,000/= in bankers cheque payable to the Youth Enterprise Development Fund. The document can also be viewed and downloaded from our website [www.youthfund.go.ke](http://www.youthfund.go.ke) and Supplier Information Portal [www.supplier.treasury.go.ke](http://www.supplier.treasury.go.ke) free of charge. Bidders who download the tender document from the website must forward their particulars **immediately** for records and communication of any further clarifications or addenda. Enquiries can be made via email address: [info@youthfund.go.ke](mailto:info@youthfund.go.ke). Bidders are advised to regularly visit the YEDF website to obtain any additional/addendum on the tender.

Tenderers should Register their tender document with procurement office after submitting, in plain, sealed envelopes indicating the **“Tender Number and Tender Description”** as described in the tender documents and must be accompanied by a tender security of **2%** of the total bid price in the form of a bank guarantee or banker's cheque from a reputable bank or from an insurance company approved by the Public Procurement Regulatory Authority (PPRA) payable to YEDF valid for **120** days from date of tender opening.

Premiums quoted should be net inclusive of all taxes, must be in Kenya Shillings and should **remain valid for ninety (90) days after date of Tender Opening.** The premiums should be provided on annual basis.

Completed tender documents are to be deposited in the tender box provided at **YEDF, Renaissance Corporate Park 4th floor, Elgon Road, Upper hill, Nairobi** or be addressed to:

**Chief Executive Officer  
Youth Enterprise Development Fund  
P. O. BOX 48610-00100, Nairobi**

So as to be received on or before **Monday 7<sup>th</sup> June, 2021 at 10.30 am.**

The bids shall be opened immediately thereafter in the Boardroom on 4<sup>th</sup> floor Renaissance corporate plaza, in the presence of bidders or their representatives who choose to attend.

YEDFB reserves the right to accept or reject the applications and is not obliged to give reasons for its decision thereof. Any direct or indirect canvassing will lead to automatic disqualification of bidders.

**Chief Executive Officer**

**YOUTH ENTERPRISE DEVELOPMENT  
FUND**

## SECTION II - INSTRUCTION TO TENDERERS

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## **SECTION II - INSTRUCTIONS TO TENDERERS**

### **2.1. Eligible Tenderers**

2.1.1 This Invitation for Tenders is open to all tenderers eligible as described in the Appendix to Instructions to Tenderers. Successful tenderers shall provide the services for the stipulated duration from the date of commencement (hereinafter referred to as the term) specified in the tender documents.

2.1.2 The procuring entity's employees, committee members, Fund members and their relatives (spouse and children) are not eligible to participate in the tender unless where specially allowed under section 131 of the Act.

2.1.3 Tenderers shall provide the qualification information statement that the tenderer (including all members of a joint venture and subcontractors) is not associated, or have been associated in the past, directly or indirectly, with a firm or any of its affiliates which have been engaged by the Procuring entity to provide consulting services for the preparation of the design, specifications, and other documents to be used for the procurement of the services under this Invitation for tenders.

2.1.4 Tenderers involved in the corrupt or fraudulent practices or debarred from participating in public procurement shall not be eligible.

### **2.2 Cost of Tendering**

2.2.1 The Tenderer shall bear all costs associated with the preparation and submission of its tender, and the procuring entity, will in no case be responsible or liable for those costs. Regardless of the conduct or outcome of the tendering process

2.2.2 The price to be charged for the tender document shall not exceed Kshs. 2,000/= for hard copies.

2.2.3 The procuring entity shall allow the tenderer to review the tender document free of charge before purchase.

### **2.3 Contents of Tender Document**

2.3.1 The tender documents comprise the documents listed below and addenda issued in accordance with clause 2.5 of these instructions to tenderers.

- i) Instructions to Tenderers
- ii) General Conditions of Contract
- iii) Special Conditions of Contract
- iv) Schedule of Requirements
- v) Details of Insurance Cover
- vi) Form of Tender
- vii) Price Schedules
- viii) Contract Form
- ix) Confidential Business Questionnaire Form

x) Tender security Form

- xi) Performance security Form
- xii) Insurance Company's Authorization Form

23.2 The Tenderer is expected to examine all instructions, forms, terms and specification in the tender documents. Failure to furnish all information required by the tender documents or to submit a tender not substantially responsive to the tender documents in every respect will be at the tenderers risk and may result in the rejection of its tender.

## **2.4 Clarification of Tender Documents**

24.1 A Candidate making inquiries of the tender documents may notify the Procuring entity by post, fax or by email at the procuring entity's address indicated in the Invitation for tenders. The Procuring entity will respond in writing to any request for clarification of the tender documents, which it receives not later than seven (7) days prior to the deadline for the submission of the tenders, prescribed by the procuring entity. Written copies of the Procuring entities response (including an explanation of the query but without identifying the source of inquiry) will be sent to all candidates who have received the tender documents.

24.2 The procuring entity shall reply to any clarifications sought by the tenderer within 3 days of receiving the request to enable the tenderer to make timely submission of its tender.

24.3 Preference where allowed in the evaluation of tenders shall not exceed 15% (as allowed by Procurement Act)

## **2.5 Amendment of Tender Documents**

25.1 At any time prior to the deadline for submission of tenders, the Procuring entity, for any reason, whether at its own initiative or in response to a clarification requested by a prospective tenderer, may modify the tender documents by issuing an addendum.

25.2 All prospective tenderers who have obtained the tender documents will be notified of the amendment by post, fax or email and such amendment will be binding on them.

25.3 In order to allow prospective tenderers reasonable time in which to take the amendment into account in preparing their tenders, the Procuring entity, at its discretion, may extend the deadline for the submission of tenders.

## **2.6 Language of Tenders**

26.1 The tender prepared by the Tenderer, as well as all correspondence and documents relating to the tender exchanged by the tenderer and the Procuring entity, shall be written in English language. Any printed literature furnished by the tenderer may be written in another language provided they are accompanied by an accurate English translation of the relevant passages in which case, for purposes of interpretation of the tender, the English translation shall govern.

## **2.7 Documents Comprising the Tender**

2.7.1 The tender prepared by the tenderer shall comprise the following components:



- a) A **Form of Tender** and a **Price Schedule completed** in accordance with paragraph **2.8, 2.9 and 2.10** below
- b) Documentary evidence established in accordance with paragraph **2.1.2** that the tenderer is eligible to tender and is qualified to perform the contract if its tender is accepted;
- c) Tender security furnished in accordance with paragraph 2.12 (if applicable)
- d) Declaration Form.

## **2.8. Form of Tender**

2.8.1 The tenderer shall complete the Tender Form and the Price Schedule furnished in the tender documents, indicating the services to be provided.

## **2.9. Tender Prices**

The tenderer shall indicate on the form of tender and the appropriate Price Schedule the **unit prices** and **total tender price** of the services it proposes to provide under the contract.

**Prices** indicated on the Price Schedule shall be the cost of the services quoted including all customs duties and VAT and other taxes payable.

Prices quoted by the tenderer shall remain fixed during the Term of the contract unless otherwise agreed by the parties. A tender submitted with an adjustable price quotation will be treated as non-responsive and will be rejected, pursuant to paragraph 2.20.5

## **2.10. Tender Currencies**

2.10.1 Prices shall be quoted in Kenya Shillings

## **2.11. Tenderers Eligibility and Qualifications**

2.11.1 Pursuant to paragraph 2.1 the tenderer shall furnish, as part of its tender, documents establishing the tenderers eligibility to tender and its qualifications to perform the contract if it's tender is accepted.

2.11.2 **The documentary evidence of the** tenderer's qualifications to perform the contract if its tender is accepted shall establish to the Procuring entity's satisfaction that the tenderer has the financial and technical capability necessary to perform the contract.

## **2.12. Tender Security**

2.12.1 The tenderer shall furnish, as part of its tender, a tender security for the amount and form specified in the **Appendix to Instructions to Tenderers**.

2.12.2 The tender security shall not exceed 2 per cent of the tender price.

2.12.3 The tender security is required to protect the Procuring entity against the risk of Tenderer's conduct which would warrant the security's forfeiture, pursuant to paragraph 2.12.7

2.12.4 The tender security shall be denominated in **Kenya Shillings** or in another **freely convertible currency**, and shall be in the form

- a) Cash.
- b) A bank guarantee.
- c) Such insurance guarantee approved by the Authority (Public Procurement Oversight Authority).
- d) Letter of credit.

2.12.5 Any tender **not secured** in accordance with paragraph **2.12.1.** and **2.12.3** Shall be rejected by the Procuring entity as non-responsive, pursuant to paragraph 2.20.5.

2.12.6 Unsuccessful Tenderer's tender security will be discharged or returned as promptly as possible but not later than **thirty (30)** days after the expiration of the period of tender validity.

2.12.7 The successful Tenderer's tender security will be discharged upon the tenderer signing the contract, pursuant to paragraph 2.29, and furnishing the performance security, pursuant to paragraph 2.30.

2.12.8 The tender security may be forfeited:

- a) if a tenderer withdraws its tender during the period of tender validity.
- b) in the case of a successful tenderer, if the tenderer fails:
  - i) to sign the contract in accordance with paragraph 2.29 or
  - ii) to furnish performance security in accordance with paragraph 2.30.
- c) If the tenderer reject correction of an arithmetic error in the tender.

### **2.13. Validity of Tenders**

2.13.1 Tenders shall remain valid *for 90 days* after date of tender opening pursuant to paragraph 2.18. A tender valid for a shorter period shall be rejected by the Procuring entity as non-responsive.

2.13.2 In exceptional circumstances, the Procuring entity may solicit the Tenderer's consent to an extension of the period of validity. The request and the responses thereto shall be made in writing. The tender security provided under paragraph 2.12 shall also be suitably extended. A tenderer granting the request will not be required nor permitted to modify its tender.

### **2.14. Format and Signing of Tenders**

2.14.1 The tenderer shall prepare an original and a copy of the tender, clearly marking each **"ORIGINAL TENDER"** and **"COPY OF TENDER,"** as appropriate. In the event of any discrepancy between them, the original shall govern.

2.14.2 The original and all copies of the tender **shall be typed or written in indelible ink** and shall be signed by the tenderer or a person or persons duly authorized to bind the tenderer to the contract. All pages of the tender, except for un-amended printed literature, shall be initialed by the person or persons signing the tender.

2.14.3 The tender shall have **no interlineations, erasures, or overwriting** except as necessary to correct errors made by the tenderer, in which case such corrections shall be initialed by the person or persons signing the tender.

### **2.15 Sealing and Marking of Tenders**

**The tenderer shall seal the original and the copy of the tender in separate envelopes, duly marking the envelopes as “ORIGINAL TENDER” and “COPY OF TENDER”. FINANCIAL QUOTES should be put in separate envelopes clearly marked. The envelopes shall then be sealed in an outer envelope.**

**2.15.1** The inner and outer envelopes shall:

- (a) Be addressed to the Procuring entity at the address given in the Invitation to Tender.
- (b) Bear tender number and name in the invitation to tender and the words, **“DO NOT OPEN BEFORE Monday 7<sup>th</sup> June, 2021 at 10.30 am.**

**2.15.2** The inner envelopes shall also indicate the name and address of the tenderer to enable the tender to be returned unopened in case it is **declared “late”**.

2.15.3 If the outer envelope is not sealed and marked as required by paragraph **2.15.2**, the Procuring entity will assume no responsibility for the tender’s misplacement or premature opening.

## **2.16. Deadline for Submission of Tenders**

Tenders must be received by the Procuring entity at the address specified under paragraph 2.15.2 not later **than Monday 7<sup>th</sup> June, 2021 at 10.30 am.**

The Procuring entity may, at its discretion, extend this deadline for the submission of tenders by amending the tender documents in accordance with paragraph 2.5.3 in which case all rights and obligations of the Procuring entity and candidates previously subject to the deadline will thereafter be subject to the deadline as extended.

Bulky tenders which will not fit the tender box shall be received by the procuring entity as provided for in the appendix.

## **2.17. Modification and Withdrawal of Tenders**

2.17.1 The tenderer may modify or withdraw its tender after the tender’s submission, provided that written notice of the modification, including substitution or withdrawal of the tenders, is received by the Procuring entity prior to the deadline prescribed for submission of tenders.

2.17.2 The tenderer’s modification or withdrawal notice shall be prepared, sealed, marked and dispatched in accordance with the provisions of paragraph 2.15. a withdrawal notice may also be sent by fax or email but followed by a signed confirmation copy, postmarked no later than the deadline for submission of tenders.

2.17.3 No tender may be modified after the deadline for submission of tenders.

2.17.4 **No tender may be withdrawn** in the interval between the deadline for submission of tenders and the expiration of the period of tender validity. Withdrawal of a tender during this interval may result in the Tenderer’s forfeiture of its tender security, pursuant to paragraph 2.12.7.

## **2.18. Opening of Tenders**

2.18.1 The Procuring entity will open all tenders in the presence of tenderers' representatives who choose to attend, on Monday 7<sup>th</sup> June, 2021 at 10.30 am and in the location specified in the invitation for tenders. The tenderers' representatives who are present shall sign a register evidencing their attendance.

2.18.2 The tenderers' names, tender modifications or withdrawals, tender prices, discounts, and the presence or absence of requisite tender security and such other details as the Procuring entity, at its discretion, may consider appropriate, will be announced at the opening.

2.18.3 The Procuring entity will prepare minutes of the tender opening, which will be submitted to tenderers that signed the tender opening register and will have made the request.

## **2.19 Clarification of Tenders**

2.19.1 To assist in the examination, evaluation and comparison of tenders the Procuring entity may, at its discretion, ask the tenderer for a clarification of its tender. The request for clarification and the response shall be in writing, and no change in the prices or substance of the tender shall be sought, offered, or permitted.

2.19.2 Any effort by the tenderer to influence the Procuring entity in the Procuring entity's tender evaluation, tender comparison or contract award decisions may result in the rejection of the tenderers' tender.

## **2.20 Preliminary Examination and Responsiveness**

2.20.1 The Procuring entity will examine the tenders to determine whether they are complete, whether any computational errors have been made, whether required sureties have been furnished, whether the documents have been properly signed, and whether the tenders are generally in order.

**2.20.2 Arithmetical errors** will be rectified on the following basis. If there is a **discrepancy between the unit price and the total price** that is obtained by multiplying the unit price and quantity, the unit price shall prevail, and the total price shall be corrected. If the candidate does not accept the correction of the errors, its tender will be rejected, and its tender security forfeited. If there is a **discrepancy between words and figures**, the amount in words will prevail. **(Bidders are required to be careful while filling the tender document, correction of errors is not allowed under the Act).**

2.20.3 The Procuring entity may **waive** any minor informality or **non-conformity** or irregularity in a tender which does not constitute a material deviation provided such waiver does not prejudice or affect the relative ranking of any tenderer.

2.20.4 Prior to the detailed evaluation, pursuant to paragraph 2.20, the Procuring entity will determine the substantial responsiveness of each tender to the tender documents. For purposes of these paragraphs, **a substantially responsive tender is one which conforms to all the terms and conditions of the tender documents without material deviations** the Procuring entity's determination of a **tender's responsiveness** is to be based on the contents of the tender itself without recourse to extrinsic evidence.

2.20.5 If a tender is not substantially responsive, it will be rejected by the procuring entity and may not subsequently be made responsive by the tenderer by correction of the nonconformity.

## **2.21. Conversion to single currency**

2.21.1 Where other currencies are used, the Procuring entity will convert those currencies to Kenya Shillings using the selling exchange rate on the date of tender closing provided by the Central Bank of Kenya.

## **2.22. Evaluation and Comparison of Tenders**

2.22.1 The Procuring entity will evaluate and compare the tenders which have been determined to be substantially responsive, pursuant to paragraph 2.20

2.22.2 The Procuring entity's evaluation of a tender will take into account, in addition to the tender price, the following factors, in the manner and to the extent indicated in paragraph 2.22.3.

(a) Operational plan proposed in the tender;

(b) Deviations in payment schedule from that specified in the Special Conditions of Contract

2.22.3 Pursuant to paragraph 2.22.2., the following evaluation methods will be applied.

(a) Operational Plan/ proposal of the required service

(i) The Procuring entity requires that the services under the Invitation for Tenders shall be performed at the time specified in the Schedule of Requirements. Tenders' offering to perform longer than the procuring entity's required delivery time may be treated as non-responsive and rejected.

(b) Deviation in payment schedule

(i) Tenderers shall state their tender price for the payment on schedule outlined in the special conditions of contract. Tenders will be evaluated on the basis of this base price. Tenderers are, however, permitted to state an alternative payment schedule and indicate the reduction in tender price they wish to offer for such alternative payment schedule. The Procuring entity may consider the alternative payment schedule offered by the selected tenderer.

2.22.4 The tender evaluation committee shall evaluate the tender within the shortest time possible but within the requirements of procurement Act 2015

## **2.23. Contacting the Procuring entity**

2.23.1 Subject to paragraph 2.19 no tenderer shall contact the Procuring entity on any matter relating to its tender, from the time of the tender opening to the time the contract is awarded.

2.23.2 Any effort by a tenderer to influence the Procuring entity in its decisions on tender evaluation, tender comparison, or contract award may result in the rejection of the Tenderers' tender.

## **2.24 Post-qualification**

2241 The Procuring entity will verify and determine to its satisfaction whether the tenderer that is selected as having submitted **the lowest evaluated responsive tender** is qualified to perform the contract satisfactorily.

2242 The determination will take into account the **tenderer financial and technical capabilities**. It will be based upon an examination of the documentary **evidence of the tenderers qualifications** submitted by the tenderer, pursuant to paragraph 2.11.2, as well as such other information as the Procuring entity deems necessary and appropriate

2243 An affirmative determination will be a **prerequisite for award of the contract to the tenderer**. A negative determination will result in rejection of the Tenderer's tender, in which event the Procuring entity will proceed to the next lowest evaluated tender to make a similar determination of that Tenderer's capabilities to perform satisfactorily.

## **2.25 Award Criteria**

2251 Subject to paragraph 2.29 the Procuring entity will award the contract to the successful tenderer whose tender has been **determined to be substantially responsive** and has been determined to be **the lowest evaluated tender**, provided further that the tenderer is determined to be **qualified to perform** the contract satisfactorily

2252 To qualify for contract awards, the tenderer shall have the following:

- a) Necessary qualifications, capability experience, services, equipment and facilities to provide what is being procured.
- b) Legal capacity to enter into a contract for procurement
- c) Shall not be insolvent, in receivership, bankrupt or in the process of being wound up and is not the subject of legal proceedings relating to the foregoing.
- d) Shall not be debarred from participating in public procurement.

## **2.26. Procuring entity's Right to accept or Reject any or all Tenders**

2261 The Procuring entity reserves the right to accept or reject any tender, and to annul the tendering process and reject all tenders at any time prior to contract award, without thereby incurring any liability to the affected tenderer or Tenderers or any obligation to inform the affected tenderer or Tenderers of the grounds for the Procuring entity's action. If the Procuring entity determines that none of the tenders is responsive, the Procuring entity shall notify each tenderer who submitted a tender.

2262 The procuring entity shall give prompt notice of the termination to the tenderers and on request give its reasons for termination within 14 days of receiving the request from any tenderer.

2263 A tenderer who gives false information in the tender document about his qualification or who refuses to enter into a contract after notification of contract award shall be considered for debarment from participating in future public procurement.

## **2.27 Notification of Award**

2.27.1 Prior to the expiration of the period of tender validity, the Procuring entity will notify the successful tenderer in writing that its tender has been accepted.

2.27.2 The notification of award will signify the formation of the contract subject to the signing of the contract between the tenderer and the procuring entity pursuant to clause 2.9. Simultaneously the other tenderers shall be notified that their tenders were not successful.

2.27.3 Upon the successful Tenderer's furnishing of the performance Security pursuant to paragraph 2.29 the Procuring entity will promptly notify each unsuccessful Tenderer and will discharge its tender security, pursuant to paragraph 2.12

## **2.28 Signing of Contract**

2.28.1 At the same time as the Procuring entity notifies the successful tenderer that its tender has been accepted, the Procuring entity will simultaneously inform the other tenderers that their tenders have not been successful.

2.28.2 Within fourteen (14) days of receipt of the Contract Form, the successful tenderers shall sign and date the contract and return it to the Procuring entity.

2.28.3 The contract will be definitive upon its signature by the two parties.

2.28.4 The parties to the contract shall have it signed within 30 days from the date of notification of contract award unless there is an administrative review request.

## **2.29 Performance Security**

2.29.1 The successful tenderer shall furnish the performance security in accordance with the Conditions of Contract, in a form acceptable to the Procuring entity.

2.29.2 Failure by the successful tenderer to comply with the requirement of paragraph 2.29 or paragraph 2.30.1 shall constitute sufficient grounds for the annulment of the award and forfeiture of the tender security, in which event the Procuring entity may make the award to the next lowest evaluated tender or call for new tenders.

## **2.30 Corrupt or Fraudulent Practices**

2.30.1 The Procuring entity requires that tenderers observe the highest standard of ethics during the procurement process and execution of contracts. A tenderer shall sign a declaration that he has not and will not be involved in corrupt or fraudulent practices.

2.30.2 The Procuring entity will reject a proposal for award if it determines that the tenderer recommended for award has engaged in corrupt or fraudulent practices in competing for the contract in question

2.30.3 Further a tenderer who is found to have indulged in corrupt or fraudulent practices risks being debarred from participating in public Procurement in Kenya.



## Appendix to Instructions to Tenderers

The following information for the procurement of insurance services shall complement, supplement, or amend, the provisions on the instructions to tenderers. Wherever there is a conflict between the provisions of the instructions to tenderers and the provisions of the appendix, the provisions of the appendix herein shall prevail over those of the instructions to tenderers.

| Instruction to tender reference | Particulars of Appendix to instructions to tenderers  |
|---------------------------------|---|
| 2.1                             | Indicate eligible Tenderers: <b>Only for Underwriting Insurance Companies Licensed by the IRA to transact Medical Insurance Business.</b>   |
| 2.1.3                           | Qualification Information statement: <b>All preliminary requirements MUST be met</b>  |
| 2.2.2                           | Price to be charged for tender documents – Kshs. 2,000/- for hard copies.   |
| 2.11                            | Particulars of eligibility and qualifications documents of evidence required (Mandatory). <b>Copies of: -</b><br><b>i) Certificate of Registration/Incorporation under the companies Act (CAP 486)</b><br><b>ii) Copy of valid Registration with the Insurance Regulatory Authority (IRA) for 2020</b><br><b>iii) Certificate of valid tax compliance</b><br><b>iv) Audited Accounts for the last three years</b><br><b>v) Properly filled Confidential Business Questionnaire.</b> |
| 2.12.1                          | Particulars of tender security if applicable. <b>Amount of 2% of total bid price valid for 120 days from the date of tender opening, i.e. additional thirty (30) days after the expiry of the tender validity period.</b>   |
| 2.12.4                          | Form of Tender Security. <b>The Tender Security shall be in the form of Bank Guarantee from a reputable bank or a Guarantee from an Insurance Company approved by the Public Procurement Regulatory Authority (PPRA).</b>   |
| 2.13                            | Validity of Tenders: <b>Tenders shall remain valid for 90 days after date of Tender Opening</b>   |
| 2.15.2 (b)                      | State day, date and time of tender closing: <b>Monday 7<sup>th</sup> June, 2021 at 10 30 am.</b>  |
| 2.16.1                          | Deadline for submission of Tenders: <b>Monday 7<sup>th</sup> June, 2021 at 1030 am</b>  |
| 2.16.3                          | Bulky tenders that will not fit in the tender box shall be delivered to the Procurement Unit and will be signed for if required.  |
| 2.18.1                          | Opening of Tenders: Immediately after closing time.   |

### **MANDATORY REQUIREMENTS**

|    |  |
|----|--|
| 1  | Certified Copy of Certificate Registration/Incorporation   |
| 2  | Current valid IRA License and certified by the issuing body  |
| 3  | Current valid AKI Membership Certificate for the year 2021 and certified by the issuing body   |
| 4  | Certified Valid tax compliance and Valid Business Permit   |
| 5  | Bid bond of 2% of tender sum valid for 120 days from day of tender opening in form of bank guarantee.  |
| 6  | Must fill the form of Tender and price schedule in the format provided.  |
| 7  | Must submit a duly filled up confidential business questionnaire in format provided, duly signed and stamped and current CR12.                         |
| 8  | Ethics and Integrity Pact duly filled and signed in the format provided  |
| 9  | Must provide certified audited accounts for at least Three (3) Financial years prior to Tendering. (2020,2019,2018)                                    |
| 10 | Must have paid up capital of at least Kshs.300 Million (Attach Evidence)   |
| 11 | Evidence of Ksh. 100 Million Medical Insurance premiums each year for the last Three years ( attach evidence)  |
| 12 | Underwriting profit in medical of at least ksh. 1million year 2020 as per IRA Report(Attach extract)   |
| 13 | Two copies of the Tender (Copy and Original) book bound ,all pages indexed, serialized, stamped and counter signed                                     |
| 14 | Nationwide coverage of Doctors, specialists and panel of hospitals and undertaking to list any hospital proposed by Youth Enterprise Development Fund. |
| 15 | Undertaking for willingness to offer Extra Gratia  |
| 16 | Give details of 24 hrs help line, ambulance services   |

### **TECHNICAL REQUIREMENTS**

| No. | Category                             | Criteria   | Marks                       | Total |
|-----|--------------------------------------|--|-----------------------------|-------|
| 1   | Firm's Experience                    | Current five (5) Medical Insurance Recommendation/award Letters of over Kes. 25 Million each   | 2 points per recommendation | 10    |
|     |                                      | Current five (5) recommendation letters from hospitals (Mater, Aga-Khan, Mp Shah, Nairobi Hospital, Karen, Gertrudes, Nairobi Womens | 2 points per recommendation | 10    |
| 2   | Financial Capacity                   | Underwriting Profit of Kes. 400M each year for the last three years as per IRA Reports (attach extract) (2020,2019,2018)             | 6 points per year           | 18    |
|     |                                      | Paid Up Capital of Kes. 300 M  | 2 points                    | 2     |
| 3.  | Human Capital                        | Certified certificates and cv's of four technical staffs with insurance qualifications   | 5 points per staff          | 20    |
| 4   | Claims                               | Medical Claims above Kes. 500 M each year for the last three years (2020,2019,2018)  | 3 points per year           | 9     |
| 5   | Credit Worthiness                    | Current and valid reference letter from the firm's bankers   | 5 points                    | 5     |
| 6   | Reinsurance Arrangements             | Reinsurance approval letter from IRA Year 2021   | 5 points                    | 5     |
|     |                                      | Reinsurance treaty year 2021   | 5 points                    | 5     |
| 7   | Credit Rating (To be checked online) | Current GCR Rating with A+,A,A- and attach Online verification.  | 5 points                    | 6     |
| 8   | Scope of the cover                   | Full in-patient Benefits   | 2 points                    | 10    |
|     |                                      | Full out-patient Benefits  | 2 points                    |       |
|     |                                      | Dental and Optical cover   | 2 points                    |       |
|     |                                      | Pre-existing cover/maternity benefits  | 2 points                    |       |
|     |                                      | Value added Benefits   | 2 points                    |       |
|     |                                      |  |                             | 100   |

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

**D) Stage Three: Financial Evaluation**

**Stage 3- Financial Evaluation**

Financial Evaluation shall conduct to determine evaluated price for each bid using the following formula:-

$$\mathbf{T.S\ (80\%) + F.S\ (20\%) = T.T.L\ (100\%)}$$

T.S = Technical Score = (Technical Evaluation) as the technical criteria

F.S = Financial Score (computed as below)

$$\mathbf{FSL \div FSC = FS}$$

FSC = Financial submission of the tender under cons

FSL = Financial score for the lowest tender.

FS = Computed financial score for each tenderer.

|      |   |
|------|---|
|      | T.T.L       =       Total Score   |
| 2.25 | <p><b>AWARD CRITERIA: The contract will be awarded:-</b></p> <p>The tenderer with the highest combined technical and financial score will be awarded Medical insurance Cover for the financial year 2021/2022</p> |
| 2.26 | Particulars of performance security if applicable. N/A  |

## SECTION III - GENERAL CONDITIONS OF CONTRACT

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## **SECTION III: GENERAL CONDITIONS OF CONTRACT**

### **3.1. Definitions**

3.1.1 In this Contract, the following terms shall be interpreted as indicated:

- a) “The Contract” means the agreement entered into between the Procuring entity and the tenderer, as recorded in the Contract Form signed by the parties, including all attachments and appendices thereto and all documents incorporated by reference therein.
- b) “The Contract Price” means the price payable to the tenderer under the Contract for the full and proper performance of its contractual obligations
- c) “The Services” means services to be provided by the tenderer including any documents, which the tenderer is required to provide to the Procuring entity under the Contract.
- d) “The Procuring entity” means the organization Procuring the services under this Contract.
- e) “The Contractor” means the organization or firm providing the services under this Contract.
- f) “GCC” means the General Conditions of Contract Contained in this section.
- g) “SCC” means the Special Conditions of Contract
- h) “Day” means calendar day

### **3.2. Application**

3.2.1 These General Conditions shall apply to the extent that they are not superseded by provisions of other part of the contract

### **3.3. Standards**

3.3.1 The services provided under this Contract shall conform to the standards mentioned in the schedule of requirements.

### **3.4. Use of Contract Documents and Information**

3.4.1 The Contractor shall not, without the Procuring entity’s prior written consent, disclose the Contract, or any provision thereof, or any specification, plan, drawing, pattern, sample, or information furnished by or on behalf of the Procuring entity in connection therewith, to any person other than a person employed by the contractor in the performance of the Contract.

3.4.2 The Contractor shall not, without the Procuring entity’s prior written consent, make use of any document or information enumerated in paragraph 2.4.1 above.

3.4.3 Any document, other than the Contract itself, enumerated in paragraph 2.4.1 shall remain the property of the Procuring entity and shall be returned (all copies) to the Procuring entity on completion of the contract's or performance under the Contract if so required by the Procuring entity

### **3.5. Patent Rights**

3.5.1 The Contractor shall indemnify the Procuring entity against all third- party claims of infringement of patent, trademark, or industrial design rights arising from use of the services under the contract or any part thereof.

### **3.6 Performance Security**

3.6.1 Within twenty-eight (28) days of receipt of the notification of Contract award, the successful tenderer shall furnish to the Procuring entity the performance security where applicable in the amount specified in SCC.

3.6.2 The proceeds of the performance security shall be payable to the Procuring entity as compensation for any loss resulting from the Tenderer's failure to complete its obligations under the Contract.

3.6.3 The performance security shall be denominated in the currency of the Contract, or in a freely convertible currency acceptable to the Procuring entity and shall be in the form of:

- a) Cash.
- b) A bank guarantee.
- c) Such insurance guarantee approved by the Authority.
- d) Letter of credit.

3.6.4 The performance security will be discharged by the Procuring entity and returned to the Candidate not later than thirty (30) days following the date of completion of the Contractor's performance of obligations under the Contract, including any warranty obligations, under the Contract.

### **3.7. Delivery of services and Documents**

3.7.1 Delivery of the services shall be made by the Contractor in accordance with the terms specified by the procuring entity in the schedule of requirements and the special conditions of contract.

### **3.8. Payment**

3.8.1. The method and conditions of payment to be made to the contractor under this Contract shall be specified in SCC

3.8.2. Payment shall be made promptly by the Procuring entity, but in no case later than sixty (60) days after submission of an invoice or claim by the contractor

### **3.9. Prices**

3.9.1 Prices charged by the contractor for Services performed under the Contract shall not, with the exception of any price adjustments authorized in SCC vary from the prices quoted by the tenderer in its tender or in the procuring entity's request for tender validity extension the case



may be. No variation in or modification to the terms of the contract shall be made except by written amendments signed by the parties.

3.9.2 Contract price variations shall not be allowed for contracts not exceeding one year (12 months)

3.9.3 Where contract price variation is allowed the variation shall be guided by the provisions of the public Procurement and Asset Disposal Act 2015 and shall not be effected before expiry of 12 months

3.9.4 Price variation requests shall be processed by the procuring entity within 30 days of receiving the request.

### **3.10. Assignment**

3.10.1 The Contractor shall not assign, in whole or in part, its obligations to perform under this Contract, except with the Procuring entity's prior written consent.

### **3.11. Termination for Default**

3.11.1 The Procuring entity may, without prejudice to any other remedy for breach of Contract, by written notice of default sent to the Contractor terminate this Contract in whole or in part:

- a) If the Contractor fails to provide any or all of the services within the period(s) specified in the Contract, or within any extension thereof granted by the Procuring entity.
- b) If the Contractor fails to perform any other obligation(s) under the Contract
- c) If the Contract in the judgment of the Procuring entity has engaged in corrupt or Fraudulent practices in competing for or in executing the contract.

3.11.2 In the event the Procuring entity terminates the contract in whole or in part, it may procure, upon such terms and in such manner as it deems appropriate, services similar to those un-delivered and the Contractor shall be liable to the Procuring entity for any excess costs for such similar services. However, the contractor shall continue performance of the contract to extent not terminated.

### **3.12. Termination for Insolvency**

3.12.1 The Procuring entity may at any time terminate the contract by giving written notice to the Contractor if the contractor becomes bankrupt or otherwise insolvent. In this event, termination will be without compensation to the contractor, provided that such termination will not prejudice or affect any right of action or remedy, which has accrued or will accrue thereafter to the procuring entity.

### **3.13. Termination for Convenience**

3.13.1 The Procuring entity by written notice sent to the contractor may terminate the contract in whole or in part, at any time for its convenience. The notice of termination shall specify that the termination is for the procuring entities convenience, the extent to which performance of the contractor of the contract is terminated and the date on which such termination becomes effective.

3.13.2 For the remaining part of the contract after termination the procuring entity may elect to cancel the services and pay to the contractor an agreed amount for partially completed services.

### **3.14 Resolution of Disputes**

3.14.1 The procuring entity and the contractor shall make every effort to resolve amicably by direct informal negotiations and disagreement or disputes arising between them under or in connection with the contract

3.14.2 If after thirty (30) days from the commencement of such informal negotiations both parties have been unable to resolve amicably a contract dispute either party may require that the dispute be referred for resolution to the formal mechanisms specified in the SCC.

### **3.15. Governing Language**

3.15.1. The contract shall be written in the English language. All correspondence and other documents pertaining to the contract, which are exchanged by the parties, shall be written in the same language.

### **3.16. Applicable Law**

3.16.1 The contract shall be interpreted in accordance with the laws of Kenya unless otherwise expressly specified in the SCC.

### **3.17 Force Majeure**

3.17.1 The Contractor shall not be liable for forfeiture of its performance security, or termination for default if and to the extent that its delay in performance or other failure to perform its obligations under the Contract is the result of an event of Force Majeure.

### **3.18 Notices**

3.18.1 Any notices given by one party to the other pursuant to this contract shall be sent to the other party by post or by Fax or Email and confirmed in writing to the other party's address specified in the SCC.

3.18.2 A notice shall be effective when delivered or on the notices effective date, whichever is later.

## SECTION IV - SPECIAL CONDITIONS OF CONTRACT

Special Conditions of Contract as relates to the General Conditions of Contract

| Reference of general conditions of contract | Special condition of contract   |
|---|---|
| 3.7 Delivery of Services                    | <b>For a Contract period of One (1) years .</b>   |
| 3.8 Payment                                 | Annual premium will be paid either once (or on equal installments) at the beginning of the policy.  |
| 3.9 Price adjustment                        | <b>No Price adjustments allowed.</b> However, the policy should be able to provide for additional staff / Authority members and or reduction of the same at similar price |
| 3.18 Notices                                | Procuring Entity<br><br><b>Chief Executive Officer YEDF<br/>Renaissance Corporate park 4<sup>th</sup><br/>Floor<br/>P. O. BOX 23035-00100<br/>NAIROBI</b>                 |
| Others                                      | As necessary  |

## SECTION V – SCHEDULE OF REQUIREMENTS

YEDF wishes to engage an insurance underwriting company to provide **Medical Insurance (Both Inpatient and Out Patient) Cover.**

The Insurance Underwriting Company must meet the following conditions: -

- 1) Must be registered with the Insurance Regulatory Authority for the current year and a copy of the current license be submitted.
- 2) Must give, at least ten (10) clients for the current year, preferably five (5) from the public sector with reference letters and the total clients' premiums for the medical insurance.
- 3) **Must submit copies of the audited accounts for 2 previous years.**
- 4) Must attach CV's of key management and technical staff (Finance, Accounts Relations, Case Management).
  - ✓ Must submit copies of the following documents;
  - ✓ Certificate of Registration/Incorporation including certificate of any change of name.
  - ✓ Valid Tax Compliance Certificate
  - ✓ Company profile
- 5) Must provide proof of membership of the Association of Kenya Insurers (AKI).
- 6) **Provide proof of being in medical insurance business for the last five (5) years to date.**
- 7) Completely Fill the Confidential Business Questionnaire.
- 8) The bidders must quote for medical insurance both inpatient and outpatient for the bids to be considered complete **Must complete the form of tender and price schedule in the formats provided.**
- 9) Any other information or documents which in your opinion may assist in the objective evaluation of your proposal.
- 10) All bids admitted at the mandatory qualification shall be subjected to technical, due diligence evaluation and financial evaluation.

## SECTION VI: DETAILS OF MEDICAL INSURANCE COVER

### TERMS OF REFERENCE FOR PROVISION OF MEDICAL INSURANCE

#### 1. BACKGROUND

The Youth Enterprise Development Fund (YEDF) was transformed into a state corporation on 11<sup>th</sup> May 2007. The Fund focuses on Enterprise Development as a key strategy that will increase economic opportunities for, and participation by the Kenyan Youth in Nation building. The Fund seeks to engage the services of a medical and group life insurance provider.

#### 2. OBJECTIVIVES

The main objective will be to facilitate timely and efficient provision of medical attention to YEDF employees.

#### 3. SCOPE OF WORK

##### PART A: MEDICAL COVER FOR YEDF STAFF AND BOARD MEMBERS

##### Category A

|  |                    |                   |                  |
|--|--------------------|-------------------|------------------|
| <b>Grade 1-2</b>   | <b>No of staff</b> | <b>1</b>          |                  |
| <b>Plan</b>  |                    | <b>Cover type</b> | <b>Limit</b>     |
| <b>Inpatient</b>   |                    | <b>Family</b>     | <b>1,200,000</b> |
| <b>Outpatient (Dental kes 40,000&amp;Optical kes 40,000 inclusive)</b> |                    | <b>Family</b>     | <b>200,000</b>   |
| <b>Maternity</b>   |                    | <b>Family</b>     | <b>100,000</b>   |
| <b>Last Expense</b>  |                    | <b>Employee</b>   | <b>100,000</b>   |

##### Category B

|  |                    |                      |                  |
|--|--------------------|----------------------|------------------|
| <b>Grade 3-4</b>   | <b>No.of staff</b> | <b>4</b>             |                  |
| <b>Plan</b>  |                    | <b>Type of cover</b> | <b>Limit</b>     |
| <b>Inpatient</b>   |                    | <b>Family</b>        | <b>1,000,000</b> |
| <b>Outpatient (Dental kes 40,000&amp;Optical kes 40,000 inclusive)</b> |                    | <b>Family</b>        | <b>200,000</b>   |
| <b>Maternity</b>   |                    | <b>Family</b>        | <b>100,000</b>   |
| <b>Last Expense</b>  |                    | <b>Family</b>        | <b>100,000</b>   |

**Category C**

|   |                    |                      |                |
|---|--------------------|----------------------|----------------|
| <b>Grade 5-7</b>  | <b>No of staff</b> | <b>32</b>            |                |
| <b>Plan</b>   |                    | <b>Type of cover</b> | <b>Limit</b>   |
| <b>Inpatient</b>  |                    | <b>Family</b>        | <b>800,000</b> |
| <b>Outpatient(Dental kes 40,000&amp;Optical kes 40,000 inclusive)</b> |                    | <b>Family</b>        | <b>200,000</b> |
| <b>Maternity</b>  |                    | <b>Family</b>        | <b>100,000</b> |
| <b>Last Expense</b>   |                    | <b>Employee</b>      | <b>100,000</b> |

**Category D**

|   |                    |                      |                |
|---|--------------------|----------------------|----------------|
| <b>Grade 8-12</b>   | <b>No of staff</b> | <b>25</b>            |                |
| <b>Plan</b>   |                    | <b>Type of cover</b> | <b>Limit</b>   |
| <b>Inpatient</b>  |                    | <b>Family</b>        | <b>500,000</b> |
| <b>Outpatient(Dental kes 40,000&amp;Optical kes 40,000 inclusive)</b> |                    | <b>Family</b>        | <b>200,000</b> |
| <b>Maternity</b>  |                    | <b>Family</b>        | <b>100,000</b> |
| <b>Last Expense</b>   |                    | <b>Employee</b>      | <b>100,000</b> |

**Category E**

| <b>DIRECTORS</b>  |                       |                      |                  |
|---|-----------------------|----------------------|------------------|
| <b>Plan</b>   | <b>No of people 8</b> | <b>Type of cover</b> | <b>Limit</b>     |
| <b>Inpatient</b>  |                       | <b>Individual</b>    | <b>1,000,000</b> |
| <b>Outpatient(Dental kes 40,000&amp;Optical kes 40,000 inclusive)</b> |                       | <b>Individual</b>    | <b>200,000</b>   |
| <b>Last Expense</b>   |                       | <b>Individual</b>    | <b>100,000</b>   |
|   |                       |                      |                  |

**Category F**

|   |                        |                   |                |
|---|------------------------|-------------------|----------------|
| <b>Plan</b>   | <b>No.of staff 146</b> | <b>Type cover</b> | <b>Limit</b>   |
| <b>Inpatient</b>  |                        | <b>Family</b>     | <b>500,000</b> |
| <b>Outpatient(Dental kes 40,000&amp;Optical kes 40,000 inclusive)</b> |                        | <b>Family</b>     | <b>100,000</b> |
| <b>Maternity</b>  |                        | <b>Family</b>     | <b>100,000</b> |
| <b>Last Expense</b>   |                        | <b>Family</b>     | <b>100,000</b> |

### 3. SCOPE OF WORK

**The Total number of staff to be covered are 208**

**Permanent and pensionable are 62**

**Contract staff are 146**

**N/B: That for contract staff the cover caters for Principal member spouse and two children only.**

**Note: Requirements for categories A-D (M+5)**

**Requirements for category E (M)**

**Requirement for category F (M+3)**

- The cover to cater for the employee's next of kin on the event of death up to ksh 50,000
- To attach a list of service providers with a nationwide coverage
- Employee's last Expense to be covered up to ksh 100,000/-
- Claim notification period not more than 2 weeks.
- Maternity antenatal cases to be offset from the outpatient cover and not from the maternity cover.  
Please note that Maternity to remain strictly for the time of delivery
- The first ever emergency Caesarian section shall be catered for under the standard in patient benefits subject to a limit of Ksh 150,000 per family per annum.

### 4. TERMS OF PAYMENT

The successful firm will be issued with an LSO and payments will be made based on the terms agreed by both parties.

### 5. TERMS OF SERVICE

The successful firm will be contracted to carry out the services for the financial year **2021/2022** renewable Subject to satisfactorily service delivery.

## **SECTION VI - STANDARD FORMS**

### **Notes on the standard Forms**

1. **Form of TENDER** - The form of Tender **MUST** be completed by the tenderer and submitted with the tender documents. It **MUST** also be duly signed and stamped by duly authorized representatives of the tenderer. NB: In case you generate this form do not alter the wordings and its format.
2. **Price Schedule Form** - The price schedule form **MUST** similarly, be completed, signed and submitted with the tender.
3. **Contract Form** - The contract form shall not be completed by the tenderer at the time of submitting the tender. The contract form shall be completed after contract award and should incorporate the accepted contract price.
4. **Confidential Business Questionnaire Form** - This form **MUST** be completed and signed by the tenderer and submitted with the tender documents.
5. **Tender Security Form** - When required by the tender document the tenderer shall provide the tender security either in the form included hereinafter or in another format acceptable to the procuring entity and must be submitted with the tender.
6. **Performance security Form** - The performance security form should not be completed by the tenderer at the time of tender preparation. Only the successful tenderer will be required to provide performance security in the form provided herein or in another form acceptable to the procuring entity.



**Form of Tender (MANDATORY)**

To: .....

Date: .....

Name and address of procuring entity

Tender No. Tender Name

Gentlemen and/or Ladies: -

1. Having examined the Tender documents including Addenda No. (Insert numbers) ..... the receipt of which is hereby duly acknowledged, we the undersigned, offer to provide Insurance Services under this tender in conformity with the said Tender document for the sum of ..... [Total Tender amount in words and figures] or such other sums as may be ascertained in accordance with the Schedule of Prices attached herewith and made part of this Tender.
2. We undertake, if our Tender is accepted, to provide the Insurance Cover Services in accordance with the conditions of the tender.
3. We agree to abide by this Tender for a period of ..... [number] days from the date fixed for Tender opening of the Instructions to Tenderers, and it shall remain binding upon us and may be accepted at any time before the expiration of that period.
4. This Tender, together with your written acceptance thereof and your notification of award, shall constitute a Contract between us subject to the signing of the contract by both parties.
5. We understand that you are not bound to accept the lowest or any tender you may receive.

Dated this: ..... day of..... 20.....

.....  
[Signature]

.....  
[In the capacity of]

Duly authorized to sign tender for and on behalf of .....

## **PREMIUM SUMMARY COSTS**

| Item No. | Description of Insurance Cover   | Total Premium (Kshs.) |
|----------|----------------------------------|-----------------------|
| 1        | Inpatient Cost                   |                       |
| 2        | Outpatient Cost                  |                       |
| 3        | Maternity Cost                   |                       |
| 4        | Dental Cost (Within Outpatient)  |                       |
| 5        | Optical Cost (Within outpatient) |                       |
|          |                                  |                       |

**NB:** Annual premium will be paid either once (or in equal installments, based on Exchequer releases) at the beginning of the policy.

**Signature and Stamp of tenderer:**

---

**Note:** In case of discrepancy between unit premium and total, the unit premium shall prevail.

## CONTRACT FORM

THIS AGREEMENT made the..... day of.....  
20..... between [name of Procurement entity] of .....  
[Country of Procurement entity] (Hereinafter called “the Procuring entity”) of the one part  
and ..... [Name of tenderer] of [city and country of  
tenderer] (hereinafter called “the tenderer”) of the other part:

WHEREAS the Procuring entity invited tenders for the Staff Medical Insurance cover and  
has accepted a tender by the tenderer for the supply of the services in the sum of  
..... [Contract price in words in figures] (Hereinafter called  
“the Contract Price”).

### NOW THIS AGREEMENT WITNESSTH AS FOLLOWS: -

1. In this Agreement words and expressions shall have the same meanings as are respectively assigned to them in the Conditions of Contract referred to.
2. The following document shall be deemed to form and be read and construed as part of this Agreement, viz:
  - i) the Tender Form and the Price Schedule submitted by the tenderer;
  - ii) the Schedule of Requirements the Details of cover
  - iii) the General Conditions of Contract
  - iv) the Special Conditions of Contract; and
  - v) the Procuring Entity’s Notification of Award
3. In consideration of the payments to be made by the Procuring entity to the tenderer as hereinafter mentioned, the tenderer hereby covenants with the Procuring entity to provide the Medical cover and to remedy defects therein in conformity in all respects with the provisions of the Contract.
4. The Procuring entity hereby covenants to pay the tenderer in consideration of the provision of the services and the remedying of defects therein, the Contract Price or such other sum as may become payable under the provisions of the contract at the times and in the manner prescribed by the contract.

IN WITNESS, whereof the parties hereto have caused this Agreement to be executed in accordance with their respective laws the day and year first above written

Signed, sealed, delivered by..... the ..... (for the  
Procuring entity

Signed, sealed, delivered by..... the ..... (for the  
tenderer) in the presence of .....

## CONFIDENTIAL BUSINESS QUESTIONNAIRE (MANDATORY)

You are requested to give the particulars indicated in Part 1 and either Part 2 (a), 2(b) or 2(c) whichever applied to your type of business.

You are advised that it is a serious offence to give false information on this form.

### Part 1 General

Business Name .....

Location of Business Premises .....

Plot No: ..... Street/Road .....

Postal address ..... Tel No. .... Fax.....

Email..... Nature of Business.....

Registration Certificate No .....

Maximum value of business which you can handle at any one time – Kshs. 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

Given details of partners as follows

| Name    | Nationality | Citizenship details | Shares |
|---------|-------------|---------------------|--------|
| 1. .... |             |                     |        |
| 2. .... |             |                     |        |
| 3. .... |             |                     |        |
| 4. .... |             |                     |        |

#### Part 2 (c) – Registered Company

Private or Public

State the nominal and issued capital of company

Nominal Kshs. Issued Kshs.

Given details of all directors as follows

| Name    | Nationality | Citizenship details | Shares |
|---------|-------------|---------------------|--------|
| 1. .... |             |                     |        |
| 2. .... |             |                     |        |
| 3. .... |             |                     |        |
| 4. .... |             |                     |        |

Date ..... Signature of

Candidate .....

## TENDER SECURITY FORM

Whereas *[name of Bidder]* (hereinafter called <the tenderer> has submitted its bid dated *[date of submission of bid]* for the provision of insurance services (hereinafter called <the tender?

KNOW ALL PEOPLE by these presents that WE *[name of bank]* of *[name of country]*, having our registered office at *[name of procuring entity]* (hereinafter called <the procuring entity> in the sum of *[state the amount]* for which payment well and truly to be made to the said procuring entity, the Bank binds itself, its successors, and assigns by these presents. Sealed with the Common Seal of the said Bank this ..... day of ..... 20 .....

THE CONDITIONS of this obligation are: -

- 1) If the tenderer withdraws its tender during the period of tender validity specified by the procuring entity on the Form; or
- 2) If the tender, having been notified of the acceptance of its tender by the procuring entity during the period of tender validity
  - a) Fails or refuses to execute the Contract Form, if required; or
  - b) Fails or refuses to furnish the performance security, in accordance with the Instructions to tenders.

We undertake to pay to the procuring entity up to the above amount upon receipt of its first written demand, without the procuring entity having to substantiate its demand, provided that in its demand the procuring entity will note that the amount claimed by it is due to it, owing to the occurrence of one or both of the conditions, specifying the occurred condition(s).

This tender guarantee will remain in force up to and including thirty (30) days after the period of tender validity, and any demand in respect thereof should reach the Bank not later than the above stated date.

[Authorized Signatories and official stamp of the Bank]

*(Amend accordingly if provided by Insurance Company)*

## PERFORMANCE SECURITY FORM

To: .....  
[Name of procuring entity]

WHEREAS ..... [name of tenderer] (Hereinafter called “the tenderer”) has undertaken, in pursuance of Contract No. [reference number of the contract] dated ..... 20 ..... to ..... supply ..... [description of insurance services] (Hereinafter called “the Contract”)

AND WHEREAS it has been stipulated by you in the said Contract that the tenderer shall furnish you with a bank guarantee by a reputable bank for a sum specified therein as security for compliance with the Tenderer’s performance obligations in accordance with the Contract.

AND WHEREAS we have agreed to give the tenderer a guarantee: THEREFORE WE hereby affirm that we are Guarantors and responsible to you, on behalf of the tenderer, up to a total of ..... [amount of the guarantee in words and figures], and we undertake to pay you, upon your first written demand declaring the tenderer to be in default under the Contract and without cavil or argument, any sum of money within the limits of ..... [Amount of guarantee] as aforesaid, without your needing to prove or to show grounds or reasons for your demand or the sum specified therein.

This guarantee is valid until the ..... day of ..... 20

Signature and seal of the Guarantors

[Name of bank of financial institution] .....

[Address] .....

[Date] .....

(Amend accordingly if provided by Insurance Company)

**YOUTH ENTERPRISE DEVELOPMENT FUND (YEDF)**  
**ETHICS AND INTEGRITY PACT (MANDATORY)**

**TO BE FILLED, DATED, SIGNED AND SUBMITTED BY ALL PERSONS BIDDING  
FOR SUPPLY OF OR PROVISION OF ANY GOODS OR SERVICES FOR YEDF**

**Bidder's undertaking on Ethics and Integrity**

Accepting that transparent business management and fair public administration are the key to social development and national competitiveness, and in an effort to purge corruption and apply sanctions to corrupt businesses, and in full support of the worthy goals of this Integrity Pact, concerning the present proposal for: .....

I.....  
(Lead Consultant's name in the case of an individual consultancy/all personnel of

.....  
(Name of association, partnership, corporation or other entity being a non-individual consultant)  
and its sub-contractors and agents hereby agree that:

1. I/We understand that YEDF is a law-abiding institution and I/We undertake to abide by all the laws of Kenya particularly the laws, rules and regulations governing ethics and integrity and the procurement of goods and services by public agencies in Kenya. I/We shall not conduct any unethical business practices, including but not limited to making false declarations and representations in bidding documents; bid-rigging, collusive bidding, and canvassing.
2. I/We shall not offer any bribe, gifts, entertainment or any other undue benefits directly or indirectly to any officials of YEDF or indeed any other person nor commit any other act with a view to unlawfully influencing the process or outcome of procuring for the goods and/or services herein or the performance of any contract arising from the procurement process.
3. I/We undertake to report to YEDF and the Ethics and Anti-Corruption Commission (EACC) any acts of corruption and unethical practice by any official of YEDF, any of my/our employees, agents, associates, affiliates or indeed any other person that come to our knowledge in the course of procuring the supply and provision of the goods and/or services herein or the performance of any contract arising therefrom.
4. In bidding for the goods and/or services herein or the performance of any contract that may arise therefrom, I/We shall not make any statement which is untrue based on our knowledge, information and belief/ I/We shall fully and truthfully declare my/our ability to provide the goods and/or perform the services and we will not bid for the supply of goods or provision of services which we do not have the capacity to provide whether at all or under the terms required by YEDF
5. I/We declare that we have the legal and operational capacity to make a bid for the goods and/or services herein, including but not limited to the fact that I/We am/not an un-discharged bankrupt, under receivership or liquidation or otherwise insolvent nor suffering from any such or other incapacity that would make our bid or our ability to provide the goods and/or services herein legally or operationally untenable.
6. I/We declare that there is no conflict of interest situation existing between myself/us on the one hand and YEDF on the other with regard to the supply of the goods and/or provision of the services herein that would make my/our bid or contract ethically or legally untenable. If any such conflict arises in the course of the procurement process and before the conclusion of any contract arising therefrom, I/We shall fully and truthfully declare such conflict to YEDF.



7. I/We understand that violation of this pact may lead to the disqualification of my/our bid, to the termination of any contract or obligation between myself/us and YEDF and my/our prosecution.

Signed: .....

Date: .....

Name of Authorized Signatory: .....

