

# **Biashara Sacco Society Ltd**



**TENDER NO. BSSL/12(c)/2017-2018**

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**PREQUALIFICATION OF BIDDERS**  
**Provision of Group Life Insurance Services,**  
**FOR THE**  
**PERIOD ENDING DECEMBER 2018.**

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**TENDERER'S NAME: PROVISION OF GROUP LIFE  
INSURANCE SERVICES.**

**REFERENCE: BSSL/12(c)/2017-2018**

**ITEM DESCRIPTION: PREQUALIFICATION OF BIDDERS FOR  
PROVISION OF GROUP LIFE  
INSURANCE SERVICES FOR THE  
PERIOD ENDING DECEMBER 2018.**

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# Tender Notice

Reference: BSSL/12(c)/2017 - 2018

Tender name: **PREQUALIFICATION OF BIDDERS FOR  
PROVISION OF GROUP LIFE INSURANCE  
SERVICES FOR THE PERIOD ENDING  
DECEMBER 2018.**

**1.1** Biashara Sacco Society Ltd invites applications for pre-qualification/registration of Suppliers from interested and eligible bidders for Provision of Group Life Insurance Services for the period ending December 2018.

**1.2** Interested eligible candidates may obtain further information from and inspect the Pre-qualification documents at the Sacco's Head quarter during normal working hours.

**1.3** A complete set of tender documents may be obtained by interested candidates from our website: [www.biasharasacco.com](http://www.biasharasacco.com) or in soft copy from our Headquarter in Nyeri, along Kimathi Way during working hours.

**1.4** Duly completed pre-qualification documents in plain sealed envelopes clearly marked "**Prequalification documents for the supply/provision of goods and services**" and be deposited in the Tender Box in any of our branches or be addressed to:

THE CHIEF EXECUTIVE OFFICER  
BIASHARA SACCO SOCIETY LTD,  
P.O BOX 1895-10100  
NYERI

So as to be received on or before **27<sup>th</sup> December, 2016 at 11.00 A.M.**

**1.5** Tenders will be opened thereafter in the presence of the Candidates or their representatives who choose to attend at The Sacco's Boardroom, Nyeri Kimathi Way Branch.

## **PRE-QUALIFICATION INSTRUCTIONS**

### **2.1 Introduction**

Biashara Sacco Society Ltd invites interested candidates who must qualify by meeting the set criteria as provided by the procuring entity to perform the contract of supply and delivery or provision of goods and services to the society.

### **2.2 Pre-qualification Objective**

The main objective is to procure goods and also provide services under relevant tenders/quotations to the society as and when required during the period ending December 2018.

### **2.3 Invitation of Pre-qualification**

Suppliers registered with Registrar of Companies under the Law of Kenya in respective merchandise or services are invited to submit their PRE-QUALIFICATION documents to THE CHIEF EXECUTIVE OFFICER, BIASHARA SACCO SOCIETY LTD, so that they may be pre-qualified for submission of quotations. Bids will be submitted in complete lots singly or in combination. The prospective Suppliers are required to supply mandatory information for pre-qualification.

### **2.4 Experience**

Prospective suppliers and contractors must have carried out successful supply and delivery of similar items/services to other institution of similar size and complexity. Potential suppliers/contractors must demonstrate the willingness and commitment to meet the pre-qualification criteria.

### **2.5 Pre-qualification Document**

This document includes questionnaire forms and documents required of prospective suppliers.

**2.6** In order to be considered for pre-qualification, prospective suppliers must submit all the information herein requested.

### **2.7 Distribution of Pre-qualification Documents**

**Two copies** of the completed pre-qualification data and other requested information shall be submitted to reach:

THE CHIEF EXECUTIVE OFFICER,  
BIASHARA SACCO SOCIETY LTD,  
P.O BOX 1895-10100,  
NYERI

**Not later than Tuesday, 27<sup>th</sup> December 2016 at 11.00A.M.**

## **2.8 Questions Arising from Documents**

Questions that may arise from the pre-qualification documents should be directed to the Chief Executive Officer's Office or **email biasharasacco@yahoo.com**

## **2.9 Additional Information**

The Society reserves the right to request submission of additional information from prospective bidders.

## **2.10 Invitation to Tender**

Request for quotations will be made available only to those bidders whose qualifications are accepted by Society after scoring more than 75% points after the completion of the pre-qualification process.

## **3. BRIEF CONTRACT REGULATIONS/GUIDELINES**

### **3.1 Taxes on Imported Materials**

The Supplier will have to pay custom duty and VAT as applicable for all imported materials to be supplied unless the item(s) is/are donor funded.

### **3.2 Customs Clearance**

The contractors shall be responsible for custom clearance of their imported goods and materials.

### **3.3 Contract Price**

The contract shall be of unit price type or cumulative of computed unit price and quantities required. Quantities may increase or decrease as determined by demand and on the authority of the client's Management or Tender Committee. Prices quoted should be inclusive of all delivery charges.

### **3.4 Payments**

All local purchase shall be on credit of a minimum of thirty (30) days or as it may be stipulated in the Contract Agreement.

## **4. PRE-QUALIFICATION DATA INSTRUCTIONS**

### **4.1 Pre-qualification data forms**

Bidders are instructed **not to change the format, page arrangements of this document**. They are advised to prepare well arranged attachment(s) as required by the PQs forms. Failure to adhere to this will lead to deduction of 25 points from your overall rating points.

**4.1.1** The attached questionnaire forms PQ-1, PQ-2, PQ-3, PQ-4, PQ-5, PQ-6, PQ-7 and PQ-8, are to be completed by prospective suppliers/contractors/service providers who wish to be pre-qualified for submission of tender for the specific tender.

**4.1.2** **The pre-qualified application forms which are not filled out completely and submitted in the prescribed manner will not be considered. All the documents that form part of the proposal must be written in English and in ink.**

### **4.2 Qualification**

**4.2.1** It is understood and agreed that the pre-qualification data on prospective bidders is to be used by the Society in determining, according to its sole judgment and discretion, the qualifications of prospective bidders to perform in respect to the Tender Category as described by the client.

**4.2.2** Prospective bidders will not be considered qualified unless in the judgment of the Society that they possess capability, experience, qualified personnel available, suitability of equipment and net current assets or

working capital sufficient to satisfactorily execute the contract for the Provision of Group Life Insurance Services for the Period Ending December 2018.

### **4.3 Essential Criteria for Pre-qualification**

**4.3.1** (a) Experience: Prospective bidders shall have at least 3 years' experience in provision of the said services and allied items. The potential supplier/contractor should show competence, willingness, and capacity to service the contract.

(b) Prospective supplier requires special experience and capability to organize supply and delivery of items, or services at short notice.

### **4.3.2 Personnel**

The names, pertinent information, and the CV of the key personnel for individual or group to execute the contract must be indicated in form PQ-3.

### **4.3.3 Financial Condition**

The Supplier's financial condition will be determined by latest financial statement submitted with the prequalification documents as well as letters of reference from their bankers regarding suppliers/contractors credit position. Potential suppliers/contractors will be pre-qualified on the satisfactory information given.

**4.3.4** Special consideration will be given to the financial resources available as working capital, taking into account the amount of uncompleted orders on contract and now in progress (Data on Form PQ-4). However, potential bidders should provide evidence of financial capability to execute the contract.

### **4.3.5 Past Performance**

Past performance will be given due consideration in pre-qualifying bidders. Letter of reference from past customers should be included in Form PQ-6 where applicable.

### **4.4 Statement**

Application must include a sworn statement Form PQ-8 by the Tenderer ensuring the accuracy of the information given.

#### **4.5 Withdrawal of Prequalification**

Should a condition arise between the time the firm is pre-qualified to bid and the bid opening date which in the opinion of the Society could substantially change the performance and qualification of the bidder or his ability to perform such as but not limited to bankruptcy, change in ownership or new commitments, the Society reserves the right to reject the tender from such a bidder even though he was initially pre-qualified.

**4.6** The firm must have a fixed Business Premise and must be registered in Kenya, with certificate of registration or incorporation (memorandum and Article of Association copies must be attached).

**4.6.1** The firm must show proof that it has paid all its statutory obligations and have current Tax compliance certificate

#### **4.7 Prequalification Criteria**

<b>Required Information</b>	<b>Form Type</b>	<b>Points Score</b>
1. Registration Documentation	PQ-1	35
2. Pre-qualification Data	PQ-2	15
3. Supervisory Personnel	PQ-3	10
4. Financial Position	PQ-4	10
5. Confidential Report	PQ-5	10
6. Past Experience	PQ-6	10
7. Litigation History	PQ-7	10
	<b>TOTAL</b>	<b>100</b>

**4.8 The qualification is 75 points and over**



## **FORM PQ-1      PRE-QUALIFICATION**

All firms must provide:-

1. Certified Copies of Certificate of Registration/ Incorporation
2. Copy of VAT Registration Certificate.
3. Tax Compliance Certificate from Kenya Revenue Authority (failure to produce this certificate to approve compliance, will lead to automatic disqualification thus no further evaluation of your application).
4. Copies of PIN certificate of firm/company/individual.
5. Copy of current trading license
6. Certified copy of registration by regulating body

**FORM PQ-2 - PRE-QUALIFICATION DATA**

**REGISTRATION OF SUPPLIERS APPLICATION FORM**

I/We ..... hereby apply for registration  
as supplier(s) of .....

Post Office Address ..... Tel No .....

Email ..... Town .....

Street ..... Name of building .....

Room/Office No. .... Floor No. ....

Full Name of applicant .....

Signature ..... Date .....

Witness's Name .....

Signature ..... Date .....

**2. Organization & Business Information**

Managing Director .....

Chief Executive Officer .....

Finance Director .....

Company Secretary .....

Other .....

Partnership (if applicable)

Names of Partners

3. Business founded or incorporated .....

4. Under present management since .....

5. Net worth equivalent Ksh.....
6. Bank reference and address .....  
.....
7. Bonding company reference and address .....
8. Enclose copy of organization chart of the firm indicating the main fields of activities .....
9. State any technological innovations or specific attributes which distinguish you from your competitors .....
- .....
- .....
10. Indicate terms of trade/sale .....

**PQ-3            SUPERVISORY PERSONNEL**

Name .....

Age .....

Academic Qualification .....

.....

Professional Qualification .....

.....

Length of service with Contractor or Supplier position held .....

.....

(Attach copies of certificates of key personnel in the organization)

**PQ-4 - FINANCIAL POSITION AND TERMS OF TRADE**

- (1) Attach a copy of firm's TWO YEARS certified financial statements giving summary of assets and current liabilities/or any other financial support.
- (2) Attach letters of reference from the bankers regarding supplier's credit position.

**FORM PQ-5**

**CONFIDENTIAL BUSINESS QUESTIONNAIRE**

You are requested to give the particulars indicated in Part I and either Part 2 (a), 2 (b) or 2 (c) whichever applies 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: .....

Nature of Business .....

Location of Business premises .....

Current Trading License No ..... Expiring Date .....

Maximum value of business which you can handle at any time:

KShs.....

Name of your Bankers ..... Branch .....

**Part 2 (a) – Sole Proprietor**

Name (In Full) .....

Nationality ..... Country of Origin .....

Citizenship details .....

**Part 2 (b) – Partnership**

Give details of Partners as follows:-

Name	Nationality	Citizenship details	Shares
1. ....			
2. ....			
3. ....			
4. ....			
5. ....			

**Part 2 (c) Registered Company**

Private or Public .....

Trading Name .....

Reg. No. .... Date of Incorporation .....

State the nominal and issued share capital of the company

Nominal .....

Issued .....

Give details of the directors as follows:-

Name	Nationality	Citizenship details	Shares
1. ....			
2. ....			
3. ....			
4. ....			
5. ....			

(Any additional information can be attached on a different sheet)

**FORM PQ-6 - PAST EXPERIENCE**

**NAMES OF THE APPLICANTS CLIENTS IN THE LAST TWO YEARS  
NAMES OF OTHER CLIENTS AND VALUES OF CONTRACT/ORDERS**

1.
  - i) Name of Client (organization) .....
  - ii) Address of Client (organization) .....
  - iii) Name of Contact Person at the client (organization) .....
  - iv) Telephone No. of Client .....
  - v) Value of Contract .....
  - vi) Duration of Contract (date) .....  
(Attach documental evidence of existence of contract)
  
2. Name of 2<sup>nd</sup> Client (organization)
  - i) Name of Client (organization) .....
  - ii) Address of Client (organization) .....
  - vii) Name of Contact Person at the client (organization) .....
  - viii) Telephone No. of Client .....
  - ix) Value of Contract .....
  - x) Duration of Contract (date) .....  
(Attach documental evidence of existence of contract)
  
3. Name of 3<sup>rd</sup> Client (organization)
  - i) Name of Client (organization) .....
  - ii) Address of Client (organization) .....
  - xi) Name of Contact Person at the client (organization) .....
  - xii) Telephone No. of Client .....
  - xiii) Value of Contract .....
  - xiv) Duration of Contract (date) .....  
(Attach documental evidence of existence of contract)
  
4. Others .....

**FORM PQ-7 - LITIGATION HISTORY**

Name of Contract Supplier.....

Contractors/Suppliers should provide information on any history litigation or arbitration resulting from contracts executed in the last five years or currently under execution.

YEAR	AWARD FOR OR AGAINST	NAME OF CLIENT CAUSE OF LITIGATION AND MATTER IN DISPUTE	DISPUTED AMOUNT (CURRENT VALUE, KSHS. EQUIVALENT)



**FORM PQ-8 - SWORN STATEMENT**

Having studied the pre-qualification information for the above project we/I hereby state:

- a. The information furnished in our application is accurate to the best of our knowledge.
- b. That in case of being pre-qualified we acknowledge that this grants us the right to participate in due time in the submission of a tender or quotation on the basis of provisions in the tender or quotation documents to follow.
- c. When the call for Quotations is issued the legal technical or financial conditions or the contractual capacity of the firm changes we come ourselves to inform you and acknowledge your right to review the pre-qualification made.
- d. We enclose all the required documents and information required for the pre-qualification evaluation.

**Date** .....

**Applicant's Name**.....

**Represented by** .....

**Witnessed by**.....  
**(COMMISSIONER FOR OATHS)**

**Signature** .....

.....  
**(Full name and designation of the person signing and stamp or seal)**

**NOTE:** (Failure to fill this form will lead to automatic disqualification for the bid)