



KENYA FORESTRY RESEARCH INSTITUTE

TENDER NO. KEFRI/EOI/001/2020-2021

TENDER NAME: EXPRESSION OF INTEREST (EOI) FOR CONSULTANCY
SERVICES FOR POST RETIREMENT MEDICAL FUND FOR KEFRI STAFF

RELEASE DATE: 15TH SEPTEMBER 2020

CLOSING DATE: WEDNESDAY, 30TH SEPTEMBER, 2020, AT 11:30 A.M

KENYA FORESTRY RESEARCH INSTITUTE



INVITATION TO TENDER

The Kenya Forestry Research Institute (KEFRI) invites sealed bids from eligible candidates for the below listed tenders;

No	Tender Reference Number	Tender Title	Target Group	Bid Closing Date
1.	KEFRI/ONT/002/2020 - 2021	Proposed Construction of 3No. Seed Stores; Rift Valley Eco-Region Research Programme – Londiani , Rift Valley Eco-Region Research Programme- Turbo Sub center and Central Highlands Eco-Region Research Programme- Muguga	Open/AGPO Registered Firms are encouraged to apply	Wednesday 30 th September 2020 at 11.30am
2.	KEFRI/ONT/003/2020 - 2021	Proposed Renovation of Mau Sub Centre – Sinendet	AGPO – Registered Firms	Wednesday 30 th September 2020 at 11.30am
3	KEFRI/ONT/004/2020 - 2021	Proposed Chainlink Fencing at Tiva Woodlands -Kitui	AGPO – Registered Firms	Wednesday 30 th September 2020 at 11.30am
4	KEFRI/EOI/001/2020 - 2021	Expression of Interest (EOI) For Consultancy Services for Post-Retirement Medical Fund(PRMF) for KEFRI Staff	Open	Wednesday 30 th September 2020 at 11.30am

Tender documents can be downloaded free of charge from KEFRI website www.kefri.org or Public Procurement Information Portal, www.tenders.go.ke. Tenderers who intend to submit a bid are required to submit their contacts through: tenders@kefri.org for the purpose of clarification and/or addendum.

Completed bid documents must be submitted in a plain sealed envelope (“**original**” and “**copy**”)all clearly marked with the tender number and name indicated as per instructions in the tender document and addressed to:

The Director

Kenya Forestry Research Institute

P.O BOX 20412-00200 City Square

Nairobi

and deposited in the tender box situated at the entrance of the Director's office - KEFRI Headquarters, Muguga, so as to be received on or before the bid closing date of **Wednesday 30th September 2020 at 11.30am, the received bids will be open immediately thereafter at the Auditorium Hall - KEFRI Headquarters - Muguga** in the presence of the tenderers or their representatives who choose to attend.

DIRECTOR - KEFRI

1.0 Background

Kenya Forestry Research Institute Defined Contribution Retirement Benefits Scheme (KEFRI DCRBS) is a Defined Contributory Pension Scheme set up by a Trust Deed and Rules dated June 13, 2011 bearing commencement date of July 1, 2011. The fund is presently invested under segregated platform.

The fund is duly registered by both the Retirement Benefits Authority (RBA) and the Kenya Revenue Authority (KRA) under certificate number 01334 and P/20140331/93 respectively. As at March 2020, assets under management stood at **KES. 2.657B** complemented by 796 active members at a weighted average age of 54.10 years.

Legal Notice No. 192 of 2018 provided the guidelines in the Pension Industry, for setting up a Post-Retirement Medical Fund. The fund shall be established **within the existing retirement benefits scheme** to which contributions are made and from which the costs of medical benefits can be met as shall be determined in accordance with **the medical fund rules**. The Board of Trustees and the Sponsor would therefore wish to comply with this Regulation.

2.0 Terms of Reference

The Institute intends to contract the services of an experienced Actuarial Consultant to review the liability profile for the Scheme Members and advice on the various scenarios for setting up the Post-Retirement Medical Fund (PRMF).

The Specific Terms of Reference (TOR) for the consultancy are:

1. Provide advice to the scheme on the **most appropriate design and/or structure** of the PRMF;
2. Provide advice on the **administrative framework and rules** of the PRMF which should include, BUT not limited to:
 - a. Eligibility criteria
 - b. Contribution arrangements
 - c. Benefit access
 - d. Investment framework
 - e. Integration of the benefits with NHIF, etc;
3. Advice on the various **benefit provision mechanisms**;
4. Estimate **the various contribution requirements** under various **benefit scenarios**;
5. Advice on **appropriate contribution** structures;
6. Provide guidance on **integration of the PRMF with existing pension** arrangements including financial implications to the current contribution rates by the members and the employer; and
7. Provide **any other appropriate information and guidance** on implementation of PRMFs.

3.0 Scope of the Assignment

The assignment will involve reviewing the liability profile for the Scheme Members and advise on the various scenarios for setting up the Post-Retirement Medical Fund (PRMF).

The Consultant(s) will be expected to present an Inception report to the Board of Trustees and KEFRI Management before the commencement of the work.

4.0 Reporting/ Supervision/ Presentation

The Consultancy team will work under the overall guidance and management of Director KEFRI in coordination with the Trust Secretary and Deputy Director Human Resource. The Institute and Pension Secretariat will avail the required documents for review by the Consultant and provide any other necessary support that will facilitate the data collection and final presentation.

ELIGIBILITY AND QUALIFICATIONS

(A) Preliminary Evaluation Criteria (Mandatory Requirements)

No	Requirements	Responsiveness YES/NO
MR 1	Must attach Company Registration/Incorporation certificate;	
MR 2	Must attach Valid Tax compliance certificate	
MR 3	Must attach valid Business Permit/Trade License from county Government	
MR 4	Must attach CR 12 /13	
MR 5	Must attach Audited Financial statements for the last two (2) years 2019 & 2018	
MR 6	Completed tender documents (original and copy) must be tape bound and serialized from the first to the last page including all attachments. The numbering/serialization should be done by a numbering machine or computer. Hand written pagination and spiral binding will not be accepted.	
MR 7	Duly filled, signed and stamped business questionnaire	
MR8	Duly filled, signed and stamped self-declaration form	

NB:

Bidders who fulfill all the mandatory requirements will proceed to the technical evaluation

(B) Technical Evaluation Criteria

No	Requirements	Responsiveness YES/NO
1.	Must submit a detailed company profile including the organogram	
2.	List two reputable corporate clients (1 must be in the public sector) where similar undertakings- Postretirement medical fund consultancy or equivalent have been handled between the year 2017-2019 (Attach Evidence - LPO/LSO/Contracts/and recommendation letters from those listed clients.	
3.	<p>i) Qualification and Experience of the Lead Consultant(Attach Certificates and a CV signed and stamped by the CEO or equivalent)</p> <p>Must have at least Bachelor’s Degree in Actuarial Science or its equivalent</p> <p>Must be a Fellow of the Institute of Actuaries or Society of Actuaries as prescribed in the Retirement Benefits Act</p> <p>At least 10 years’ actuarial experience</p> <p>ii) Qualification and Experience of two other Technical staff (Attach Certificates and a CV signed and stamped by the CEO or equivalent)</p> <p>Must have at least Bachelors in Actuarial Science or its equivalent</p> <p>Must be a Fellow of the Institute of Actuaries or Society of Actuaries as prescribed in the Retirement Benefits Act;</p> <p>At least 5 years’ actuarial experience</p>	
4.	Provide a work plan and a detailed methodology on how to execute the assignment on each TOR	

CONFIDENTIAL BUSINESS QUESTIONNAIRE

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 addressTel 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 <table border="0"> <thead> <tr> <th>Name</th> <th>Nationality</th> <th>Citizenship details</th> <th>Shares</th> </tr> </thead> <tbody> <tr> <td>1.</td> <td>.....</td> <td>.....</td> <td>.....</td> </tr> <tr> <td>2.</td> <td>.....</td> <td>.....</td> <td>.....</td> </tr> <tr> <td>3.</td> <td>.....</td> <td>.....</td> <td>.....</td> </tr> <tr> <td>4.</td> <td>.....</td> <td>.....</td> <td>.....</td> </tr> </tbody> </table>	Name	Nationality	Citizenship details	Shares	1.	2.	3.	4.
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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 <table border="0"> <thead> <tr> <th>Name</th> <th>Nationality</th> <th>Citizenship details</th> <th>Shares</th> </tr> </thead> <tbody> <tr> <td>1.</td> <td>.....</td> <td>.....</td> <td>.....</td> </tr> <tr> <td>2.</td> <td>.....</td> <td>.....</td> <td>.....</td> </tr> <tr> <td>3.</td> <td>.....</td> <td>.....</td> <td>.....</td> </tr> <tr> <td>4.</td> <td>.....</td> <td>.....</td> <td>.....</td> </tr> </tbody> </table>	Name	Nationality	Citizenship details	Shares	1.	2.	3.	4.
Name	Nationality	Citizenship details	Shares																		
1.																		
2.																		
3.																		
4.																		
	Date.....Signature of Candidate.....																				

SELF DECLARATION FORM

Date ▯

To:
The Director
Kenya Forestry Research Institute
P.O. Box 20412-00200
Nairobi

The tenderer i.e. (name and address) declare the following:

- a) Has not been debarred from participating in public procurement.

- b) Has not been involved in and will not be involved in corrupt and fraudulent practices regarding public procurement.

Name.....
Title.....
Signature.....
Date.....
Official Stamp.....

(To be signed by authorized representative and officially stamped)

NB: Successful bidders will be considered for invitation to submit their Request for Proposals (RFP)

Submission of the Expression of Interest

Proposals Containing Complete Tender Documents are to enclosed in plain sealed envelopes, marked with the tender number and name and be deposited in the Tender Box situated at the office of the **Director, Kenya Forestry Research Institute** or addressed to the Director, **Kenya Forestry Research Institute** Headquarters, **Muguga, Off Nairobi-Naivasha Road, P.O.Box 20412-00200, Nairobi** so as to be received on or before **Wednesday, 30th September, 2020 at 11.30am**

Note that the qualified consultants maybe subjected to a background check as a condition of engagement and that the Board of Trustees is not bound to accept any of the proposals submitted.