REQUEST FOR PROPOSAL

FOR

CONSULTANCY SERVICES ON THE MANAGEMENT OF ICPAK MEMBERS, BENEVOLENT BENEFIT SCHEME

REQUEST FOR PROPOSAL NO. ICPAK/RFP 001/2017-2018

INSTITUTE OF CERTIFIED PUBLIC ACCOUNTANTS OF KENYA

P.O BOX 59963-00200, NAIROBI. KENYA

TEL:0727531006,0733856262,

Email:procurement @icpak.com

Website www.icpak.com

January, 2017

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The Institute of Certified Public Accountants of Kenya invites sealed tenders from interested and competent firms for provision of ICPAK Members, Benevolent Fund management services.

TENDER NO.	**ITEM DESCRIPTION**	**TENDER COMMENCEMENT DATE**	**CLOSING DATE**
ICPAK/RFP 001/ 2017-2018.	Consultancy Services for ICPAK Members Benevolent Fund management Services	11/01/2017	25/1/2017 AT 11.00 A.M.

A complete set of tender documents may be obtained by interested candidates free of charge from the ICPAK websites; **http: www.icpak.Com.**Bid Prices quoted should be inclusive of all taxes and any other costs and shall remain valid for (90) days from the closing date of the tender. Completed Tender documents in plain sealed envelopes clearly marked on top with the tender Number and name for the Tender should be addressed to: -

The Chief Executive,
Institute of Certified Public Accountants of Kenya,
P.O Box 59963 – 00200,
NAIROBI.

and be deposited in the Tender Box on 10thfloor, CPA Centre, Ruaraka, Nairobi so as to be received on or before **25th January, 2017 at 10.00 a.m.** Tenders will be opened immediately thereafter **at 10.30 a.m.**

local time in the presence of the candidates/representatives who choose to attend in the Board Room 10th floor, CPA Centre.

Late bids shall be rejected.

CHIEF EXECUTIVE

SECTION I - LETTER OF INVITATION

January, 2017

Dear Sir,

RE: **CONSULTANCY SERVICES ON THE MANAGEMENT OF ICPAK MEMBERS, BENEVOLENT BENEFIT SCHEME**

ICPAK/RFP 001/ 2017-2018.

ICPAK invites proposals from eligible firms to provide consultancy services on the management of ICPAK members

The request for proposals (RFP) includes the following documents:

Section I	-	Letter of invitation
Section II	-	Information to consultants
		Appendix to Consultants information
Section III	-	Terms of Reference
Section IV	-	Technical proposals
Section V	-	Financial proposal
Section VI	-	Standard Contract Form

Your duly completed proposal should be received on or before **10.00a.m. 25/01 /2017.** Upon receipt of this invitation, please inform us whether or not you will submit a proposal for the assignment

Yours sincerely,

CHIEF EXECUTIVE

SECTION II – INFORMATION TO CONSULTANTS (ITC)

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SECTION II: - INFORMATION TO CONSULTANTS (ITC)

2.1 Introduction

2.1.1 The Client named the Appendix to "ITC" will select a firm among those invited to submit a proposal, in accordance with the method of selection detailed in the appendix. The method of selection shall be as indicated by the procuring entity in the Appendix.

2.1.2 The consultants are invited to submit a Technical Proposal and a Financial Proposal in two separate envelopes.

2.1.3 The consultants must familiarize themselves with local conditions and take them into account in preparing their proposals. To obtain first-hand information on the assignment and on the local

conditions, consultants are encouraged to liaise with the client regarding any information that they may require before submitting a proposal.

2.1.4 The Procuring entity will provide the inputs specified in the Appendix "ITC", assist the firm in obtaining licenses and permits needed to carry out the services and make available relevant project data and reports.

2.1.5 Please note that

(i) the costs of preparing the proposal and of negotiating the Contract, including any visit to the Client are not reimbursable as a direct cost of the assignment;

(ii) the Client is not bound to accept any of the proposals submitted.

2.1.6 The procuring entity's employees, committee members, board members and their relative (spouse and children) are not eligible to participate.

2.1.7 The tender document shall be downloaded for free from ICPAK Website

2.2 Clarification and Amendment of RFP Documents

2.2.1 Consultants may request a clarification of any of the RFP documents only up to seven [7] days before the proposal submission date. Any request for clarification must be sent in writing by paper mail, cable, telex, facsimile or electronic mail to the Client's address indicated in the Appendix "ITC". The Client will respond by cable, telex, facsimile or electronic mail to such requests and will send written copies of the response (including an explanation of the query but without identifying the source of inquiry) to all invited consultants who intend to submit proposals.

2.2.2 At any time before the submission of proposals, the Client may for any reason, whether at his own initiative or in response to a clarification requested by an invited firm, amend the RFP. Any amendment shall be issued in writing through addenda. Addenda shall be sent by mail, cable, telex or facsimile to all invited consultants and will be binding on them. The Client may at his discretion extend the deadline for the submission of proposals.

2.3 Preparation of Technical Proposal

2.3.1 The Consultants proposal shall be written in English language

2.3.2 In preparing the Technical Proposal, consultants are expected to examine the documents constituting this RFP in detail. Material deficiencies in providing the information requested may result in rejection of a proposal.

2.3.3 While preparing the Technical Proposal, consultants must give particular attention to the following:

(i) If a firm considers that it does not have all the expertise for the assignment, it may obtain a full range of expertise by associating with individual consultant(s) and/or other firms or entities in a joint venture or sub-consultancy as appropriate. Consultants shall

not associate with the other consultants invited for this assignment. Any firms associating in contravention of this requirement shall automatically be disqualified.

(ii) It is desirable that the majority of the key professional staff proposed be permanent employees of the firm or has an extended and stable working relationship with it.

(iii) Proposed professional staff must as a minimum, have the experience indicated in Appendix, preferably working under conditions similar to those prevailing in Kenya.

(iv) Alternative professional staff shall not be proposed and only one Curriculum Vitae (CV) may be submitted for each position.

2.3.4 The Technical Proposal shall provide the following information using the attached Standard Form;

(i) A brief description of the firm's organization and an outline of recent experience on assignments of a similar nature. For each assignment the outline should indicate *inter alia,* the profiles of the staff proposed, duration of the assignment, contract amount and firm's involvement.

(ii) Any comments or suggestions on the Terms of Reference, a list of services and facilities to be provided by the Client.

(iii) A description of the methodology and work plan for performing the assignment.

(iv) The list of the proposed staff team by specialty, the tasks that would be assigned to each staff team member and their timing.

(v) CVs recently signed by the proposed professional staff and the authorized representative submitting the proposal. Key information should include number of years working for the firm/entity and degree of responsibility held in various assignments during the last five (5) years.

Any additional information

2.3.5 The Technical Proposal **shall not** include any financial information.

2.4 **Preparation of Financial Proposal**

2.4.1 The Financial Proposal should clearly identify as a separate amount, the local taxes, duties, fees, levies and other charges imposed under the law on the consultants.

2.4.2 Consultants shall express the price of their services in Kenya Shillings.

2.4.3 Commissions and gratuities, if any, paid or to be paid by consultants and related to the assignment will be listed in the Financial Proposal Submission Form.

2.4.4 The Proposal must remain valid for 90 days after the submission date. During this period, the consultant is expected to keep available, at his own cost, the professional staff proposed for the assignment. The Client will make his best effort to complete negotiations within this period. If the Client wishes to extend the validity period of the proposals, the consultants shall agree to the extension.

2.5 Submission, Receipt, and Opening of Proposals

2.5.1 The original proposal (Technical Proposal and, if required, Financial Proposal; see para. 1.2) shall be prepared in indelible ink. It shall contain no interlineation or overwriting, except as necessary to correct errors made by the firm itself. Any such corrections must be initialed by the persons or person authorized to sign the proposals.

2.5.2 For each proposal, the consultants shall prepare the number of copies indicated in Appendix "A". Each Technical Proposal and Financial Proposal shall be marked **"ORIGINAL"** or **"COPY"** as appropriate. If there are any discrepancies between the original and the copies of the proposal, the original shall govern.

2.5.3 The original and all copies of the Technical Proposal shall be placed in a sealed envelope clearly marked "**TECHNICALPROPOSAL**," and the original and all copies of the Financial Proposal in a sealed envelope clearly marked **"FINANCIAL PROPOSAL"** and warning: **"DO NOT OPEN WITH THE TECHNICAL PROPOSAL"**. Both envelopes shall be placed into an outer envelope and sealed. This outer envelope shall bear the submission address and other information indicated in the Appendix "ITC" and be clearly marked, **"DO NOT OPEN, EXCEPT IN PRESENCE OF THE OPENING COMMITTEE."**

2.5.4 The completed Technical and Financial Proposals must be delivered at the submission address on or before the time and date stated in the Appendix "ITC". Any proposal received after the closing time for submission of proposals shall be returned to the respective consultant unopened.

2.5.5 After the deadline for submission of proposals, the Technical Proposal shall be opened immediately by the Opening Committee. The Financial Proposal shall remain sealed and deposited with a responsible officer of the client department up to the time for public opening of financial proposals.

2.6 Proposal Evaluation General

2.6.1 From the time the bids are opened to the time the Contract is awarded, if any consultant wishes to contact the Client on any matter related to his proposal, he should do so in writing at the address indicated in the Appendix "ITC". Any effort by the firm to influence the Client in the proposal evaluation, proposal comparison or Contract award decisions may result in the rejection of the consultant's proposal.

2.6.2 Evaluators of Technical Proposals shall have no access to the Financial Proposals until the technical evaluation is concluded.

2.7 Evaluation of Technical Proposal

2.7.1 The evaluation committee appointed by the Client shall evaluate the proposals on the basis of their responsiveness to the Terms of Reference, applying the evaluation criteria.

Each responsive proposal will be given a technical score (TS). A proposal shall be rejected at this stage if it does not respond to important aspects of the Terms of Reference or if it fails to achieve the minimum technical score of **55 out of 70 marks** .

2.8 Public Opening and Evaluation of Financial Proposal

2.8.1 After Technical Proposal evaluation, the Client shall notify those consultants whose proposals did not meet the minimum qualifying mark or were considered non-responsive to the RFP and Terms of Reference, indicating that their Financial Proposals will be returned after completing the selection process. The Client shall simultaneously notify the consultants who have secured the minimum qualifying mark, indicating the date and time set for opening the Financial Proposals and stating that the opening ceremony is open to those consultants who choose to attend. The opening date shall not be sooner than seven (7) days after the notification date. The notification may be sent by registered letter, cable, telex, facsimile or electronic mail.

2.8.2 The Financial Proposals shall be opened publicly in the presence of the consultants' representatives who choose to attend. The name of the consultant, the technical. Scores and the proposed prices shall be read aloud and recorded when the Financial Proposals are opened. The Client shall prepare minutes of the public opening.

2.8.3 The evaluation committee will determine whether the financial proposals are complete (i.e. whether the consultant has costed all the items of the corresponding Technical Proposal and correct any computational errors. The cost of any unpriced items shall be assumed to be included in other costs in the proposal. In all cases, the total price of the Financial Proposal as submitted shall prevail.

Financial evaluation will be conducted by use of the formula where by the lowest tender figure is divided by the tender figure under consideration and multiplied by the allocated weight (30) thus:-

LTF/TF x F,

This section will carry 30 marks and will be calculated as using the below method

{A/B x 100 x 30}%

Where:

A= Lowest price

B= Price quoted by each bidder lowest to the highest

30= the value attached to the price evaluation

2.8.6 The tender evaluation committee shall evaluate the tender within 30 days of from the date of opening the tender.

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

2.8.8 Where contract price variation is allowed, the variation shall not exceed 10% of the original contract price

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

2.9 Negotiations

2.9.1 Negotiations will be held at the same address as "address to send information to the Client" indicated in the Appendix "ITC". The aim is to reach agreement on all points and sign a contract.

2.9.2 Negotiations will include a discussion of the Technical Proposal, the proposed methodology (work plan), staffing and any suggestions made by the firm to improve the Terms of Reference.

2.9.3 Unless there are exceptional reasons, the financial negotiations will not involve the remuneration rates for staff (no breakdown of fees).

2.9.4 Having selected the firm on the basis of, among other things, an evaluation of proposed key professional staff, the Client expects to negotiate a contract on the basis of the experts named in the proposal. Before contract negotiations, the Client will require assurances that the experts will be actually available. The Client will not consider substitutions during contract negotiations unless both parties agree that undue delay in the selection process makes such substitution unavoidable or that such changes are critical to meet the objectives of the assignment. If this is not the case and if it is established that key staff were offered in the proposal without confirming their availability, the firm may be disqualified.

2.9.5 The negotiations will conclude with a review of the draft form of the Contract. To complete negotiations the Client and the selected firm will initial the agreed Contract. If negotiations fail, the Client will invite the firm whose proposal received the second highest score to negotiate a contract.

2.9.6 The procuring entity shall appoint a team for the purpose of the negotiations.

2.10 Award of Contract

2.10.1 The Contract will be awarded following negotiations. After negotiations are completed, the client will promptly notify other consultants on the shortlist that they were unsuccessful and return the Financial Proposals of those consultants who did not pass the technical evaluation.

2.10.2 The selected firm is expected to commence the assignment on the date and at the location specified in Appendix "A".

2.10.3 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.

2.10.4 The procuring entity may at any time terminate procurement proceedings before contract award and shall not be liable to any person for the termination.

2.10.5 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.

2.10.6 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.

2.11 Confidentiality

2.11.1 Information relating to evaluation of proposals and recommendations concerning awards shall not be disclosed to the consultants who submitted the proposals or to other persons not officially concerned with the process, until the winning firm has been notified that it has been awarded the Contract.

2.12 Corrupt or fraudulent practices

2.12.1 The procuring entity requires that the consultants observe the highest standards of ethics during the selection and award of the consultancy contract and also during the performance of the assignment. The tenderer shall sign a declaration that he has not and will not be involved in corrupt or fraudulent practices.

2.12.2 The procuring entity will reject a proposal for award if it determines that the consultant recommended for award has engaged in corrupt or fraudulent practices in competing for the contract in question.

1.12.3 Further a consultant who is found to have indulged in corrupt or fraudulent practices risks being debarred from participating in public procurement in Kenya.

APPENDIX TO INFORMATION TO CONSULTANTS

Note on the Appendix to Information to Consultants

1. The Appendix to information to consultant is intended to assist the procuring entity in providing specific information in relation to corresponding claims in the information to consultants included in Section II and the appendix has to be prepared for each specific consultancy.

2. The Procuring entity should specify in the appendix information and requirements specific to the circumstances of the procuring entity, the assignment of the consultancy and the proposals evaluation criteria that will apply to the RFP Consultancy.

3. In preparing the appendix the following aspects should be taken into consideration.

   (a) The information that specifies or complements provisions of Section II to be incorporated.

   (b) Amendments of Section II as necessitated by the circumstances of the specific consultancy to be also incorporated

   (c) Section II should remain unchanged and any changes or amendments should be introduced through the appendix.

APPENDIX TO INFORMATION TO CONSULTANTS

The following information for procurement of consultancy services and selection of consultants shall complement or amend the provisions of the information to consultants, wherever there is a conflict between the provisions of the information and to consultants and the provisions of the appendix, the provisions of the appendix herein shall prevail over those of the information to consultants.

Clause Reference

2.1 The name of the Client is: **Institute of Certified Public Accountants of Kenya.**

2.1.1The method of selection is: **Quality and cost based selection (QCBS)**

2.1.2 Technical and Financial Proposals are requested: **Yes**

The name, objectives, and description of the assignment are: **Consultancy Services for the Management of ICPAKs Benevolent Benefits Scheme**

2.1.3 A pre-proposal conference will be held: **NO**

The name(s), address(es) and telephone numbers of the Client's official(s) are

Institute of Certified Public Accountants, CPA Centre, 10th floor P.O. Box 59963-00200 Nairobi
Telephone: +254 733 856 262, +254 727 531 006; Website: http://www.icpak.com

2.1.4 The Client will provide the following inputs: ICPAK will avail staff member(s) to provide the needed support including logistical arrangements where such support is requested.
2.1.7 Taxes: **all applicable taxes**

2.5.2 Consultants must submit an original copy of the proposal.

2.5.3 Proposals must be submitted not later than the following date and time:
At 10.00 A.M. on 25/01/2017

2.6.1 The address to send information to the Client is: **As provided above**

2.6.3 The minimum technical score required to pass is: **55% out of 70%**

EVALUATION CRITERIA

In Selecting the scheme manager, submitted bids will be evaluated as follows:

1) Mandatory requirements

	A duly filled, signed and stamped expression of interest form	
	Certificate of Registration / Incorporation	
	Current Tax Compliance Certificate	
	Valid Company Pin Certificate	
	Compliance Certifications by relevant authorities; Capital Markets Authority, Insurance Regulation Authority or the Retirements Benefits Authority.	
	Copy of an endorsement certificate for the Professional Indemnity with a cover limit of at least Kshs. 75 Million per event	
	Copies of the last three (3) years audited financial statements	

2 Technical Evaluation

1	**Company Profile with key director's details**	**3**
	Company Profile	2
	Key director disclosure and their nationality	1
2	**Specific Experience of the entity related to the assignment**	**15**
	Years of Operation 2-5 years	1
	5-10 years	2
	10-15 years	3
	15-20 years	4
	Over 20 years	5
	Number of schemes under management each with over 5,000 members 1 – 5	1
	6 – 10	2
	11 – 20	3
	21 – 30	4
	31 and above	5
	Current Value of portfolio (Asset Under Management) - in Kshs Kshs. 1 - 4 Billion	1
	Kshs. 5 - 9 Billion	2
	Kshs. 10 - 14 Billion	3
	Kshs. 15 – 19 Billion	4
	Over Kshs. 20 Billion	5
3	**Academic qualification and experience of the key staff for the assignment**	**10**
	Persons having Masters' Degree with 8 years' experience in Fund/Scheme management • 0.5 marks for each, not exceeding 3 marks - Academics • 0.5 mark for each individual Eight years' experience in Fund/scheme management (in years), not exceeding 3 marks - Experience	6

	Persons having Bachelors' Degree with over 8 years' experience in Fund/Scheme management • 0.5 marks for each, not exceeding 1.5 marks - Academics • 0.5 mark for each, not exceeding 1.5 marks – Experience Persons having Diploma with over 8 years' experience in Fund/Scheme management • 0.5 marks for each, not exceeding 0.5 marks - Academics • 0.5 mark for each, not exceeding 0.5 marks – Experience	3 1
4	**Outline of ICPAK Members Benevolent Scheme Management proposals and last benefit settlement plan**	**18**
	Eligibility and the scope of coverage	5
	Disbursement schedule and amounts in (Kshs)	5
	Claim management turn-around time • Within 3 days	8
	• Within 7 days	4
	• Within 14 days	2
	• Within 30 days	0
5	**Analysis of ICPAK Members Benevolent Scheme growth projections and guarantee of at least 7.5 % return of investment**	**15**
	Highlight of fund manager's Investment philosophy	2
	Outline of Risk Management framework / Disaster recovery policy	3
	Projections of investment returns guarantee of: • Above 7.5%	10
	• Between 6 – 7.49%	7.5
	• Between 4.5 – 5.99%	4
	• Between 3 – 4.49%	2
	• Between 1.5 – 2.99%	1
6	**Operating Systems, Reporting and Client Services**	**9**
	Presence of a support software system to maintain and update portfolio information	3
	Allocation of at least Two Staff to manage ICPAK Benevolent Scheme relationship	2
	Guarantee monthly frequency of reporting the scheme performance.	4
	TOTAL SCORE TECHNICAL EVALUATION	***70***

2 Financial Evaluation

Financial evaluation will be conducted by use of the formula where by the lowest tender figure is divided by the tender figure under consideration and multiplied by the allocated weight (30) thus:- LTF/TF x F,

This section will carry 30 marks and will be calculated as using the below method

{A/B x 100 x 30}%

Where:

A= Lowest price

B= Price quoted by each bidder lowest to the highest

30= the value attached to the price evaluation

SECTION III - TECHNICAL PROPOSAL

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1. Technical proposal submission form
2. Firms references Comments and suggestions of consultants on the Terms of reference and on data, services and facilities to be provided by the procuring entity
3. Description of the methodology and work plan for performing the assignment
4. Team composition and Task assignments
5. Format of curriculum vitae (CV) for proposed Professional staff
6. Time schedule for professional personnel
7. Activity (work schedule)

1. TECHNICAL PROPOSAL SUBMISSION FORM

[_____ *Date*]

To:_____[*Name and address of Client)*

Ladies/Gentlemen:

We, the undersigned, offer to provide the consulting services for _____ _____[*Title of consultingservices*] in accordance with your Request for Proposal dated _____[*Date*] and our Proposal. We are hereby submitting our Proposal, which includes this Technical Proposal, [and a Financial Proposal sealed under a separate envelope-*where applicable*].

We understand you are not bound to accept any Proposal that you receive.

We remain,

Yours sincerely,

_____*[Authorized Signature]:*

_____*[Name and Title of Signatory]*
:
_____*[Name of Firm]*
:
_____*[Address:]*

2. FIRM'S REFERENCES

Relevant Services Carried Out in the Last Five Years That Best Illustrate Qualifications.

Using the format below, provide information on each assignment for which your firm either individually, as a corporate entity or in association, was legally contracted.

Assignment Name:	Country

Location within Country:	Professional Staff provided by Your Firm/Entity(profiles):
Name of Client:	Clients contact person for the assignment.
Address:	No of Staff-Months; Duration of Assignment:
Start Date (Month/Year):	Completion Date (Month/Year): Approx. Value of Services (Kshs)
Name of Associated Consultants. If any: Staff provided by	No of Months of Professional AssociatedConsultants:
Name of Senior Staff (Project Director/Coordinator, Team Leader) Involved and Functions Performed:	
Narrative Description of project:	
Description of Actual Services Provided by Your Staff:	

Firm's Name: _____

Name and title of signatory; _____

3. COMMENTS AND SUGGESTIONS OF CONSULTANTS ON THE TERMS OF REFERENCE AND ON DATA, SERVICES AND FACILITIES TO BE PROVIDED BY THE CLIENT.

<u>On the Terms of Reference:</u>

1.

2.

3.

4.

5.

<u>On the data, services and facilities to be provided by the Client:</u>

1.

2.

3.

4.

5.

5. TEAM COMPOSITION AND TASK ASSIGNMENTS

1. Technical/Managerial Staff

Name	Position	Task

2. Support Staff

Name	Position	Task

6. FORMAT OF CURRICULUM VITAE (CV) FOR PROPOSED PROFESSIONAL STAFF

Proposed Position: _____

Name of Firm: _____

Name of Staff: _____

Profession: _____

Date of Birth: _____

Years with Firm: _____ Nationality: _____

Membership in Professional Societies: _____

Detailed Tasks Assigned: _____

Key Qualifications:

[Give an outline of staff member's experience and training most pertinent to tasks on assignment. Describe degree of responsibility held by staff member on relevant previous assignments and give dates and locations].

Education:

[Summarize college/university and other specialized education of staff member, giving names of schools, dates attended and degree[s] obtained.]

Employment Record:

[Starting with present position, list in reverse order every employment held. List all positions held by staff member since graduation, giving dates, names of employing organizations, titles of positions held, and locations of assignments.]

Certification:

I, the undersigned, certify that these data correctly describe me, my qualifications, and my experience.

_____ Date: _____
[Signature of staff member]
_____ *Date;*
_____
[*Signature of authorised representative of the firm*]

Full name of staff member: _____

Full name of authorized representative: _____

7. TIME SCHEDULE FOR PROFESSIONAL PERSONNEL

Months/Weeks (in the Form of a Bar Chart)

Name	Position	Reports Due/ Activities	1	2	3	4	5	6	7	8	9	10	11	12	Number of months

Reports Due: _____

Activities Duration: _____

Signature: _____
(Authorized representative)

Full Name: _____

Title: _____

Address: _____

8. ACTIVITY (WORK) SCHEDULE

(a). Field Investigation and Study Items

[1st,2nd,etc, are months from the start of assignment)

	1st	2nd	3rd	4th	5th	6th	7th	8th	9th	10th	11th	12th	
Activity (Work)													
_____													
_____													
_____													
_____													

(b). Completion and Submission of Reports

Reports	Date
1. Inception Report	
4.Interim Progress Report (a)First Status Report (b)Second Status Report	
3. Draft Report	
4. Final Report	

SECTION IV: - FINANCIAL PROPOSAL

Notes on preparation of Financial Proposal

4.1 The Financial proposal prepared by the consultant should list the costs associated with the assignment. These costs normally cover remuneration for staff, subsistence, transportation, services and equipment, printing of documents, surveys etc as may be applicable. The costs should be broken done to be clearly understood by the procuring entity.

4.2 The financial proposal shall be in Kenya Shillings or any other currency allowed in the request for proposal and shall take into account the tax liability and cost of insurances specified in the request for proposal.

4.3 The financial proposal should be prepared using the Standard forms provided in this part

SECTION IV - <u>FINANCIAL PROPOSAL STANDARD FORMS</u>

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1. Financial proposal submission Form
2. Summary of costs

1. FINANCIAL PROPOSAL SUBMISSION FORM

_____*[Date]*

To: _____

_____

_____

[Name and address of Client]

Ladies/Gentlemen:

We, the undersigned, offer to provide the consulting services for (_____) *[Title of consulting services]*in accordance with your Request for Proposal dated (_____) *[Date]* and our Proposal. Our attached Financial Proposal is for the sum of (_____) *[Amount in words and figures]* inclusive of the taxes.

We remain,

Yours sincerely,

_____ *[Authorized Signature]*
:
_____ *[Name and Title of Signatory]:*

_____ *[Name of Firm]*

_____ *[Address]*

2. SUMMARY OF COSTS

Costs	Currency(ies)	Amount(s)
Subtotal Taxes Total Amount of Financial Proposal		_____

LETTER OF NOTIFICATION OF AWARD

Address of Procuring Entity

_____

_____

To: _____

_____

_____

_____

RE: Tender No. _____

Tender Name _____

This is to notify that the contract/s stated below under the above mentioned tender have been awarded to you.

_____

_____

1. Please acknowledge receipt of this letter of notification by signifying your acceptance.

2. The contract/contracts shall be signed by the parties within 30 days of the date of this letter but not earlier than 14 days from the date of the letter.

3. You may contact the officer(s) whose particulars appear below on the subject matter of this letter of notification of award.

   (FULL PARTICULARS) _____

   _____

SIGNED FOR ACCOUNTING OFFICER