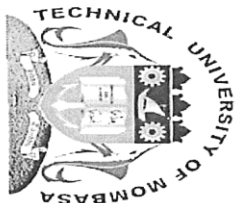




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ADDENDUM:

CHANGE OF ELIGIBILITY CRITERIA AND EXTENSION OF CLOSING/OPENING DATE

This addendum serves the invitation of tenders that appeared on MyGov Newspaper on 26th April, 2022, www.tum.ac.ke and <http://tenders.go.ke>. Bidders are advised to take note of the following changes;

Note:

1. The Tender for: TUM/T/03/2022-2023: Provision of Medical Insurance Cover Eligibility Criteria has been changed from **Underwriters Only to Open**. Detailed Eligibility Criteria is available on our website; www.tum.ac.ke for downloading.
2. The Closing/Opening date for **ALL** the **FOUR** tenders has been extended from 13th May, 2022 10:00 A.M to 17th May, 2022 at 10:00 A.M

THE VICE CHANCELLOR

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TENDER NAME: TENDER FOR PROVISION OF MEDICAL INSURANCE COVER

TENDER REF : TUM/T/03/2022-2023

AMMEDNDED ELIGIBILITY/EVALUATION CRITERIA

S/No	Description	Yes/ No
1.	Submit copy of Certificate of Registration/Incorporation from the Registrar of Companies for the underwriter or the proposed underwriter	
2.	Submit Valid Tax Compliance Certificate from Kenya Revenue Authority for the underwriter or the proposed underwriter (valid as at the date of tender opening)	
3.	Copy of perpetual license of registration with the Insurance Regulatory Authority as an Underwriting Insurance Company for Provision of Medical Insurance or the proposed underwriter must be registered to provide medical insurance cover with the Insurance Regulatory Authority.	
4.	The underwriter or the proposed underwriter must submit membership certificate for year 2022 from the Association of Kenya Insurers (AKI)	
5.	If bidding through a broker/agent one: - (i) Must be have an authorization letter from the proposed underwriter (ii) Must have current and valid copy of registered with the Insurance Regulatory Authority. (iii) Must provide have a professional Indemnity Insurance Cover of at least KShs.100 Million. (iv) Must current and valid copy as a member of the Association of Insurance Brokers of Kenya (AIBK) for 2022 (v) Must have current tax compliance certificate from Kenya Revenue Authority. (valid as at the date of tender opening) (vi) Must have valid copy of MIP Licence from IRA (vii) Copy of Valid County Government Business Permit (viii) Copy of certificate of Confirmation of Directors and Shareholding (CR 12) (Issued within the last 12 Months prior to date of Tender Opening) or National ID cards for sole proprietorships and partnerships for	
6.	Duly filled, signed and stamped Confidential Business Questionnaire	
7.	Copy of Valid County Government Business Permit for underwriter or the proposed underwriter	
8.	Copy of certificate of Confirmation of Directors and Shareholding (CR 12) (Issued within the last 12 Months prior to date of Tender Opening) or National ID cards for sole proprietorships and partnerships for underwriter or the proposed underwriter	



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9.	Tender security amounting to Kenya Shillings Two Hundred Thousand Only (Kshs. 200,000) in form a guarantee from an insurance company licensed by the Insurance Regulatory Authority and listed by the Public Procurement Regulatory Authority (PPRA) or a bank licensed by the Central Bank of Kenya. The tender security shall be valid for 30 days beyond the tender validity period provided in the TDS, i.e. tender security shall be valid for at least 170 days . Tenderers cannot guarantee themselves. Note: The tender security MUST be a hard copy submission.	
10.	Provide duly filled Self-Declaration Form that the Tenderer is Not Debarred by the Public Procurement Regulatory Authority- Form SD1	
11.	Provide duly filled Self Declaration form that the Tenderer will not engage in any Corrupt or Fraudulent Practice- Form SD2	
12.	Provide Power of Attorney giving the name of the person who should be signing the bid, authorizing him to submit / execute the agreement as a binding document	
13.	The bid document “Original” and “Copies” must be sequentially paginated / serialized on each page including all attachments. For pagination, the numbers to be used are Arabic numbers, i.e. 1,2,3,4,5,6,7,8,9,...n) n being the last Arabic number of the tender document. Note; Box files containing pages that are loose or any loose leaf pages are not acceptable; NB: 1. An insurer can only present one bid (either as Underwriter or as be proposed underwriter; (Multiple bids will lead to automatic disqualification) 2. Broker MUST only propose one underwriter	
14.	Submit the required number of copies i.e. One (1) original and One (1 No.) copies	
15.	Duly Filled Price schedule form	
16.	Duly filled Form of Tender	
17.	Duly filled Declaration and Commitment to The Code of Ethics	
18.	Duly filled Certificate of Independent Tender Determination form	
19.	Duly filled Beneficial Ownership Disclosure Form	
20.	Audited financial statements for the previous three financial (3) years (2019, 2020 and 2021)	
21.	Underwriter or proposed underwriter MUST have a paid-up Share Capital of at least Ksh.600,000,000 (Provide IRA extract or other suitable evidence) for Medical Insurance providers.	
22.	Attach documentary proof of the current re-insurance arrangement (attach contract with the reinsurance company)	
23.	Current service provider MUST have cleared ALL pending insurance claims of 30 days and above or Proof of having settle claims as per the contract term and conditions	



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	AT THIS STAGE, THE TENDERER'S SUBMISSION WILL EITHER BE RESPONSIVE OR NON RESPONSIVE. THE NON RESPONSIVE SUBMISSIONS WILL BE ELIMINATED FROM THE ENTIRE EVALUATION PROCESS AND WILL NOT BE CONSIDERED FURTHER	
S/No	Description	Max Scores
1.	<p>Specific experience of the bidder related to the assignment –Max 30 Points</p> <p>Years of experience in Medical Insurance Business</p> <p>i. 10 and Over years' experience (5Marks)</p> <p>ii. Below 10 years prorated i.e. <u>No. of years * 5</u></p> <p style="text-align: center;">10</p> <p>Attach evidence as medical insurance underwriter or proposed underwriter</p> <p>Relevant experience within the last 3 years for five Corporate/ public institution Clients, each with a minimum annual medical premium of Ksh. 50 Million.</p> <p>i. Attach proof Copy of signed contract between the client and service providers/award letter/Policy Endorsements/policy). (Max 2point each)</p> <p>ii. Attach a Letter of recommendation from each of the above five (5) Clients for each attached contract. (Max 2point each)</p> <p style="text-align: center;">Above Client</p> <p>Recommendation Rating</p> <p>i. Excellent (2 marks each)</p> <p>ii. Good (1 mark each)</p> <p>iii. Average (0.5 marks)</p> <p>iv. Poor (0 marks)</p> <p>Submit letters/contract confirming credit facilities for the last one year (2021) or letter/current contracts</p> <p>Any five of the following hospitals: (2.5Marks)</p> <ul style="list-style-type: none"> • Nairobi Hospital • Mater Hospital • Kenyatta National Hospital • Karen Hospital • Aga Khan Hospital • Gertrude Hospital • Avenue Hospital Mombasa • Mombasa Hospital • Pandya Hospital • Aga Khan Hospital • Premier Hospital 	30



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	<ul style="list-style-type: none"> • Nyali Children Hospital <p>Provide a country wide list of approved health providers where you have credit facilities (TUM reserves the right to confirm directly with these providers the existence of credit facilities). The list must include providers in Mombasa, Nairobi, Kisumu, Kilifi, and Kwale, Nakuru, Lamu counties.</p> <p>1-15 Counties-1 mark 16-30 Counties-1.5 Marks 16-31 30 and above Counties- 2.5 Marks</p>	
2	<p>Understanding of the Terms of Reference – Max 20 points</p> <p>Detailed Methodology or Approach for implementing the assignment (5 marks)</p> <p>Work plan/programme of action incorporating all the activities to be undertaken as per the Terms of Reference (5 marks)</p> <p>Demonstrate clear understanding of the Terms of Reference indicating how the client deliverables will be achieved. (10 marks allocated as highlighted below)</p> <p>Giving a brief overview of the following: -</p> <ul style="list-style-type: none"> i Network Coverage - General spread of Health Providers and Specialist Doctors / Consultants presence in the counties– 3 marks ii Scheme administration – 2 marks iii Utilization/ Case management – 5 marks 	20
3	<p>Qualification & Competence - Max 15 points</p> <p>Qualifications and competence of 3 key staff as follows;</p> <p>a) Principal Officer/Account Manager</p> <ul style="list-style-type: none"> • Master’s degree in insurance, law, economics, finance, business or equivalent (attach certificate) (2Marks) • Attach a valid membership certificate from IIK (Insurance Institute of Kenya) (1Marks) • Professional Qualification in ACII/AIHK or equivalent (attach certificate) (1Marks) • A minimum of over 7 years of professional experience in insurance industry (attach CV) (4 marks) <p>b) Two (2) other Technical Officers with the following: -</p> <ul style="list-style-type: none"> • Bachelors’ degree in insurance, law, economics, finance, business or equivalent (attach certificate) (2 Marks) • Attach a valid membership certificate from IIK (Insurance Institute of Kenya) (1 Marks) • Professional Qualification in ACII/AIHK or equivalent (attach certificate) (1Marks) • A minimum of over 5 years of professional experience professional experience in insurance industry (attach CV) (3 marks) <p>Attach CVs and copies of the relevant professional and academic qualifications and valid</p>	15



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	membership certificates and/or licenses from the Professional Bodies	
4	<p>Financial Capability – Max 25 points</p> <p>Financial capability for the last three years (2019,2020 and 2021):</p> <p>i. Current ratio; (Current Assets/Current Liabilities)</p> <ul style="list-style-type: none"> • >1.5 (4 Marks each of the three years) <ul style="list-style-type: none"> • > 1 but ≤ 1.5 (2 Mark each of the three years) • Less than 1 (0 Mark each of the three years) <p>ii. Medical premium turnover for the last two financial years of at least Kshs. 500 million per annum - 4 marks for every year. (Max - 8 marks as allocated above for i. and ii.)</p> <p>The Tenderer shall demonstrate access to, or have available, liquid assets, unencumbered real assets, lines of credit, and other financial means (independent of any contractual advance pay sufficient to meet the medical cover services cash flow (attach letter of credit worthiness from bankers)</p> <p>Of more than 30% of tender sum----- 5 Marks</p> <p>o Of between 20% and 30% of tender sum----- 2.5 Marks</p> <p>o Of between 10% and 20% of tender sum----- 1 Marks</p> <p>o 10% and below of tender sum-----0 Marks</p>	25
5	<p>Suitability of the proposed scheme - Max 10Points</p> <p>Illustrate in narrative form the suitability of the scheme in relation to the scope of services rendered i.e., benefits, and cover for chronic illness for all preexisting conditions and HIV/AIDS s including Covid-19 – (2.5 marks)</p> <p>Illustrate in narrative form the suitability of the scheme provided by the insurer as relates to flexibility and convenience and MUST allow for at least three monthly equal installments premium payment terms (2.5 Marks)</p> <p>Provide details in narrative form of any added benefits and applicability. The products MUST be in line with the requirements (2.5 Marks)</p> <p>The bidder must provide evidence of using medical online insurance management system that can generate member statement and monthly reports (2.5 Marks)</p>	10
	TOTALS	100



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NB: Bidders shall be required to obtain a minimum of 70% at the Technical Evaluation to proceed to next Financial Evaluation stage. Those who score below 70% will be eliminated at this stage from the entire evaluation process and will not be considered further.

Financial Evaluation

- i. Verifying the financials and checking for arithmetical errors, omissions and price comparison among the qualified tenderers in accordance with the evaluation criteria
- ii. Financial Score (F.S.); Formula for Determining the Financial Score: The Lowest Financial Evaluated Bid amongst the bidders with score of 70% and above is to be recommended for award

Particulars of post-qualification if applicable. TUM may inspect the premises and interview management to confirm all this information given etc.

Award Criteria: Award will be made to the bidder with the lowest evaluated price

N/B: These criteria supersedes the criteria in the tender document

HEAD OF PROCUREMENT
FOR: VICE CHANCELLOR
TECHNICAL UNIVERSITY OF MOMBASA