

FUNDILIMA SACCO SOCIETY LIMITED

P.O Box 62000 - 00200 Nairobi

Tel. No. 020 - 2356669

Email: info@fundilimasacco.co.ke

Website: www.fundilimasacco.com

**TENDER NAME: - FUNDILIMA SACCO SOCIETY
LIMITED TENDER DOCUMENT FOR PROVISION OF
SECURITY SERVICES & MEMBERS LOANS GUARD FOR
THE YEAR 2022**

CATEGORY NAME

INSTRUCTIONS TO TENDERERS

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INVITATION TO TENDER

Fundilima Sacco Society Limited wishes to invite tenders from interested eligible bidders for the provision of the following services: -

1. Provision of Members Loans, Deposits and Funeral Cover Insurance for the year 2022.
2. Provision of Security services i.e. cash in transit (CIT), guarding and alarm system for the year 2022.

Interested eligible bidders may download the tender document from Fundilima Sacco Society website (www.fundilimasacco.com) free of charge.

Duly completed tender documents are to be submitted in plain sealed envelopes clearly marked with the **category name** at the Society offices tender box situated at Jomo Kenyatta University of Agriculture & Technology (JKUAT), Juja, Fedha House during working hours (9.00 a.m. – 4.00 p.m. Monday – Friday) and should be addressed to:

**Chief Executive Officer
Fundilima Sacco Society Ltd
P. O. Box 62000 – 00200,
Nairobi.**

latest by **Friday 12th November 2021 at 12.00 noon.**

Tenders will be opened soon after the closing time in the presence of the candidates' representatives who choose to attend at Fundilima Sacco Society Limited offices.

SECTION 2 - TENDER INSTRUCTIONS

2.1 INTRODUCTION

The Chief Executive Officer would like to invite interested candidates who must qualify by meeting the set criteria as provided by the procuring entity to perform the provision of the following services: -

2.11 Provision of Members Loans, Deposits and Funeral Cover Insurance.

2.12 Provision of Security services i.e. cash in transit (CIT), guarding and alarm system.

2.2 TENDER OBJECTIVE

The main objective of this part is to provide services under relevant tenders/quotations in the Society for the year 2022.

2.3 INVITATION OF TENDER

Service provider registered with Registrar of Companies under the Law of Kenya in respective merchandise or services are invited to submit their tender documents to the Chief Executive Officer, Fundilima SACCO Society Limited so that they may be pre-qualified for submission of tenders/quotations. Tender will be submitted in complete lots singly or in combination. The client requires prospective service provider to supply mandatory information for tender.

2.4 EXPERIENCE

Prospective service providers **MUST** have carried out successfully provisions of **SIMILAR SERVICES** to institutions of similar size and complexity. Potential service providers must demonstrate the willingness and commitment to meet the tender criteria.

2.5 TENDER DOCUMENT

This document includes questionnaire forms and documents required of prospective service provider.

2.6 CONSIDERATION

In order to be considered for the tender prospective supplier **MUST** submit all the information herein requested.

2.7 DISTRIBUTION OF TENDER DOCUMENTS

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

Chief Executive Officer,
Fundilima Sacco Society Limited
P. O. Box 62000– 00200,
Nairobi, Kenya.

2.8 QUESTIONS ARISING FROM DOCUMENTS

Questions that may arise from the tender documents should be directed to the Chief Executive Officer Fundilima Sacco Society Limited whose address is given above.

2.9.1 ADDITIONAL INFORMATION

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

The Society reserves the right to ACCEPT OR REJECT any tender in whole or part without giving reasons whatsoever.

2.10 INVITATION TO TENDERS

Tender documents will be made available only to those tenderers whose qualifications are accepted by Society after scoring more than 70 points soon after the completion of the tender process.

SECTION 3 - INSTRUCTIONS TO CANDIDATES/TENDERERS

3.1 INTRODUCTION

The Fundilima Sacco Society would like to invite interested candidates who must qualify by meeting the set criteria as provided by the procuring entity to perform the provision of the following services: -

2.11 Provision of Members Loans, Deposits and Funeral Cover Insurance.

2.12 Provision of Security services i.e. cash in transit (CIT), guarding and alarm system.

3.2 FORMAT AND SIGNING OF APPLICATIONS

3.2.1 The applicant shall prepare one original documents comprising the tender document, as described in Instructions to Candidates, bound with the section containing the appendix to instructions and clearly marked “ORIGINAL”. In addition, the applicant shall submit one copy of the same tender document clearly marked “COPY”. In the event of discrepancy between them, the original shall prevail.

3.2.2 The original and copy of the tender document shall be named or written in indelible ink (in case of copies, photocopies are also acceptable) and shall be signed by a person or persons duly authorized to sign on behalf of the applicant pursuant to sub clause 2.4.2. The person or persons signing the tender document shall initial all pages of the tender where entries or amendments have been made.

3.2.3 The tender shall be without alterations, omissions or conditions except as necessary to correct errors made by the applicant in each case such corrections shall be initialed by the person or persons signing the tender documents.

3.3 SUBMISSION OF APPLICANTS

3.3.1 Applications for tender shall be submitted in sealed envelopes marked,

TENDER DOCUMENT FOR PROVISION OF MEMBERS LOANS, DEPOSITS AND FUNERAL COVER INSURANCE AND OR TENDER DOCUMENT FOR PROVISION OF SECURITY SERVICES

CATEGORY NAME

and deposited in the tender box situated at Fundilima SACCO office in JKUAT, Juja addressed to:

Chief Executive Officer
Fundilima Sacco Society Limited
P. O. Box 62000 – 00200,
Nairobi, Kenya

So as to be received on or before at 12.00 noon. Applications received after the closing date shall be rejected and returned unopened.

- 3.3.2 The candidate shall seal the original and the copy of the tender document in separate envelopes duly marked the “ORIGINAL” and “COPY”. The envelopes shall then be sealed in an outer separate envelope.

The inner and outer envelopes shall: -

- (a) Be addressed and delivered to the respective locations at the address provided in the invitation for tender and the tender advertisement.
- (b) Bear the category name of the tender document. In addition to the identification required in sub-clause 3.9.1, the inner envelope shall indicate the name and address of the applicant to enable the application to be returned unopened in case it is declared “late” pursuant to clause 3.3.1.

- 3.3.3 The outer envelope:

- (a) If the outer envelope is not sealed and marked as instructed above the Society will assume no responsibility for the misplacement or premature opening of the tender document.
- (b) If the outer envelope discloses the candidate’s identity the Society will not guarantee the anonymity of the tender submission, but this shall not constitute grounds for rejection of the tender document.

- 3.3.4 All the information requested for tender shall be provided in the English language. Where information is provided in any other language, it shall be accompanied by a translation of its pertinent parts into English language. The translation will govern and will be used for interpreting the information

- 3.3.5 Failure to provide information that is essential for effective evaluation of the applicant’s qualifications or to provide timely clarification or substantiations of the information supplied may result in the applicant’s disqualification.

3.4 ELIGIBLE CANDIDATES

- 3.4.1 Service provider registered with registrar of Companies under the Laws of Kenya in respective services area are invited to submit their tender documents to the Chief Executive Officer, Fundilima Sacco Society Limited. The prospective service providers are required to supply mandatory information for tender – FORM PQ-1

- 3.4.2 Candidates shall provide such evidence of their contained eligibility satisfactory to the Society, as the Society shall reasonably request.

4.0 TENDER DATA INSTRUCTIONS

4.1 Tender data Forms

The attached questionnaire forms PQ-1, PQ-2, PQ-3, PQ-4, PQ-5, PQ-6, and PQ-7 & PQ-8 are to be completed by prospective service providers who wish to tender for the services.

The Tender application forms which are not filled out completely and submitted in the prescribed manner may not be considered. All the documents that form part of the proposal must be written in the English language and in ink.

4.2 QUALIFICATION CRITERIA

4.2.1 Tender will be based on meeting the minimum requirements to pass in the criteria set as shown below. The attached questionnaire FORMS PQ-1, PQ-2, PQ-3, PQ-4, PQ-5, PQ-6, PQ-7 & PQ-8 are to be completed by prospective service provider who wish to submit their tender for the specified tender.

4.2.2 The tender application forms – FORM PQ 2 which are not filled out completely and submitted in the prescribed manner will not be considered. The entire document that forms part of the tender must be written in English and in Ink.

4.2.3 It is understood and agreed that the tender Data on prospective bidders is to be used by the Society in determining, according to its sole judgment and discretion, the qualifications of prospective bidder to perform in respect to the Tender lot as described by the client.

4.2.4 Prospective bidders will not be considered qualified unless in the Judgment of Society they possess capability, experience, qualified personnel available and suitability of equipment and net current assets or working capital sufficient to satisfactorily execute the contract for goods/Services.

4.3 ESSENTIAL CRITERIA FOR EVALUATION OF THE TENDER

4.3.1. Experience:

(a) Prospective service provider requires special Experience and capability to organize, supply and delivery of items, or services at short notice.

4.3.2 Personnel

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

4.3.4 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 to be

filled should be provided on FORM PQ-4. However, potential bidders should provide evidence of financial capability to executive contract.

43.3.5 Confidential Business Questionnaire

The general information and details of the nature of business and location should be included in - FORM PQ-5.

4.3.5 Past Performance

For Past performance the following shall be determined by:-

- (a) Past performance will be given due consideration in pre-qualifying bidders form the date of registration. Below 5years..... 6-10years.....above10years.....
- (b) Letters of reference from past customers should be included in FORM PQ-6 where applicable.
- (c) Copies of local purchase and service orders of similar supplies should be included.

4.3.6 Litigation History and Sworn Statement

Application must include information on any history of litigation or arbitration resulting from contract executed in the last one year or currently under execution FORM PQ-7 and a sworn statement by the Tenderer ensuring the accuracy of the information given- FORM PQ-8

4.4 COST OF APPLICATION

The applicant shall bear all costs associated with the preparation and submission of its tender and the Society will in no case be responsible or liable for those costs, regardless of the conduct or outcome of the tender process.

4.5 CLARIFICATION OF TENDER DOCUMENTS

- 4.5.1 The prospective applicant requiring any clarification of the tender documents may notify the Society in writing or by cable (hereinafter the term cable is deemed to include email) at the Society's mailing address indicted in the tender data.
- 4.5.2 The Society will respond in writing to any request for clarification that he receives earlier than 7 days prior to the deadline for the submission of applications. Copies of the Society's response to queries raised by applicants (including an explanation of the query but without identifying the sources of the inquiry) will be sent to all prospective applicants who will have purchased the tender documents.

4.6 AMENDMENT OF PREQUALIFICATION DOCUMENTS

- 4.6.1 At any time prior to the deadline for submission of applications, the Society may, for any reason, whether at his own initiative or in response to a clarification requested by a prospective applicant, modify the tender documents by issuing subsequent Addenda.

4.6.2 The Addendum thus issued shall be part of the tender documents pursuant to Sub- Clause 2.7.2 and shall be communicated in writing or cable to all purchasers of the tender documents. Prospective applicants shall promptly acknowledge receipt of each Addendum by cable to the Society.

4.6.3 In order to afford prospective applicants reasonable time in which to take an Addendum into account in preparing their applications, the Society may, at his discretion, extend the deadline for the submission of applications in accordance with Clause 2.8.1.

4.7 DEADLINE FOR SUBMISSION OF TENDER DOCUMENTS

4.7.1 Applications must be received by the Society at the address specified in Sub-Clause 2.10.1, no later than the time and date stipulated in the notice for tender.

4.7.2 The Society may, at his discretion, extend the deadline for the submission of applications through the issue of an Addendum in accordance with Clause 2.8 in which case all rights and obligations of the Society and the applicants previously subject to the original deadline shall thereafter be subject to the new deadline as extended.

4.8 OPENING OF TENDER DOCUMENTS

4.8.1 The Society will open the applications in the presence of applicants' designated representatives who choose to attend, at the time, date, and location stipulated in the letter of invitation. The applicants' representatives who are present shall sign a register evidencing their attendance.

4.8.2 The Society shall prepare minutes of the opening of the tender documents, including the information disclosed to those present.

4.8.3 Applications not opened and read out at opening shall not be considered further for evaluation, irrespective of the circumstances.

4.9 PROCESS TO BE CONFIDENTIAL

4.9.1 Information relating to the examination, evaluation of applications, and recommendations for the successful candidate shall not be disclosed to applicants or any other persons not officially concerned with such process until approval to the successful applicant has been announced. Any effort by an applicant to influence the Society's processing of applications or approval decisions may result in the rejection of the applications

4.10 CLARIFICATION OF APPLICATIONS AND CONTACTING OF THE SOCIETY

4.10.1 To assist in the examination, evaluation, and comparison of applications, the Society may, at his discretion, ask any applicant for clarification of his/her application.

4.10.2 Subject to Sub-Clause 2.11.1, no applicant shall contact the Society on any matter relating to its application from the time of the opening to the time the tender list is approved. If the applicant wishes to bring additional information to the notice of the Society, it should do so in writing.

4.10.3 Any effort by any applicant to influence the Society in the Society's tender evaluation, tender comparison or tender approval decisions may result in the rejection of the candidate's application.

4.11 EXAMINATION OF TENDER DOCUMENTS AND DETERMINATION OF RESPONSIVENESS

4.11.1 Prior to the detailed evaluation of applications, the Society will determine whether each application

(a) has been properly signed and delivered pursuant to clause 2.3;

(b) is substantially responsive to the requirements of the tender documents; and

(c) provides any clarification and/or substantiation that the Society may require to determine responsiveness pursuant to Sub-Clause 2.15.

4.11.2 A substantially responsive application is one that conforms to all the terms, conditions, and specifications of the tender documents without material deviation or reservation. A material deviation or reservation is one (a) which limits in any substantial way, inconsistent with the tender documents, the Society's rights or the applicant's obligations under the contract; or (b) whose rectification would affect unfairly the competitive position of other applicants presenting substantially responsive applications.

4.11.3 If an application is not substantially responsive, it will be rejected by the Society and may not subsequently be made responsive by correction or withdrawal of the nonconforming deviation or reservation.

4.11.4 The Society will, prior to the approval of the tender may confirm the qualification of each applicant who shall have passed the technical stage the tender process in order to determine whether the applicant possesses all the requirements in the application for the tender document submitted.

4.12 NOTIFICATION OF QUALIFIED APPLICANTS

4.12.1 Applicants whose applications are determined to be successful in accordance with subclause 3.15 will be notified by the Society within thirty (30) days from the date of opening of tender documents.

4.12.2 At the same the Society notifies qualified Applicants that their applications are responsive, the Society shall notify the other Applicants whose applications are not responsive.

4.13 EVALUATION AND COMPARISON OF APPLICATIONS

4.13.1 The Society reserves the right to accept or reject any application, and to annul the tender process and reject all applications, at any time prior to approval of contact, without thereby incurring any liability to the affected applicant or applicants or any obligation to inform the affected Applicant or Applicants of the grounds for the Society's action.

4.14 NOTIFICATION OF APPROVAL

3.14.1 Prior to expiration of the period of tender validity prescribed by the Society, the Society will notify successful applicants.

4.15 ACCEPTANCE OF THE APPROVAL

4.15.1 The successful candidates shall be required to acknowledge in writing the acceptance of their tender to the Society.

4.5 WITHDRAWAL OF TENDER

Should a condition arise between the time firm has tendered the bid and the bid opening date which in the opinion of the client/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 OUTLINED SUPPLY AND DELIVERY PROCEDURES

The applicant should also submit a brief statement of supply and service delivery methods and procedures he plans to use to execute the contract in FORM PQ-2

4.7 Tender Criteria

Required Information Score	Form name	Points
1. Registration Documentation	PO-1	20
2. Tender Data	PQ-2	5
3. Supervisory Personnel	PQ-3	5
4. Financial Position	PQ-4	15
5. Past Experience	PQ-5	20
6. Sworn Statement	PQ-6	5
7. Confidential Questionnaire	PQ-7	20

	8. Litigation History	PQ-8	10
	TOTAL		100
4.8	Qualification Mark		

The qualification mark is 60 points and over.

TENDER DOCUMENTATION

All firms must provide:

- a) A copy of certificate of business registration/incorporation.
- b) A copy of tax compliance certificate.
- c) A copy of VAT and PIN registration certificate.
- d) Copy of CR 12 detailing the firm(s) director(s)
- e) Contact Address and Email addresses.
- f) Day time office Telephone / mobile number. (Working numbers only)
- g) Copy of Certificate of Registration with relevant regulatory bodies.
- h) Business / Company Profile

TENDER DATA

1. Contractor
Identification.....
Legal name of firm.....
Post office
address.....
Street and
Address.....
City.....
Country.....
Telephone
No.....
Person to contact.....
Title.....
2. Organization & Business Information.....

Management
Personnel.....
President.....
Secretary.....
General Manager
Treasurer.....
Other.....
Partnership (if applicable)
Names of Partners.....
3. Business founded or incorporated.....
4. Under present management since.....
5. Net worth equivalent Kshs.....
6. Bank reference and address.....
7. Bonding company reference and address.....
8. Enclose copy of the organization chart of the firm indicating the main fields of activities

SUPERVISORY PERSONNEL

Name.....
Age.....
Academic Qualification.....
Professional Qualification.....
Length of service with contractor or supplier position held
.....
Supply or service experience
a) Name of Client/Customer.....
b) Character and nature of Contract.....

c) Contract value.....
d) Location of Contract.....
e) Period of Contract.....
f) Title and responsibility in Contract.....
.....
g) Other.....

Proposed Technical Personnel

a)
b)
c)
d)
e)
f)
g)

Proposed position in this project if contract is awarded.....

Brief statement of supply and service delivery method the supplier plans to use to execute the contract.....

FORM PQ-4

FINANCIAL POSITION

Attach a copy of firm's two recent certified financial statements giving Summary of assets and current liabilities/or any other financial support.

FORM PQ - 5

PAST EXPERIENCE

NAMES OF THE APPLICANTS CLIENTS IN THE LAST TWO YEARS

NAMES OF APPLICANTS OTHER CLIENTS AND VALUES OF CONTRACT/ORDERS

- (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).....
2. Name of 2nd client (Organization)
- (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).....
3. Name of 3rd Client (Organization)
- (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).....
4. Others.....

FORM PQ-6

SWORN STATEMENT

Having studied the tender 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 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 Tenders/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 tender made.
- d. We enclose all the required documents and information required for the tender evaluation.

Date.....

Applicant's Name.....

Represented by.....

Signature.....

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

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 applies in your name 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.....
 Nature of business..... Current Trade License No.....
 Expiring date..... 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:

	Names	Nationality	Citizenship Details	Shares
1				
2				
3				
4				
5				
6				
7				

Part 2 (C) - Registered Company

Private or Public

State the nominal and issued capital of the company

Nominal Kshs.

Issued Kshs.

Give details of all directors as follows:

	Names	Nationality	Citizenship Details	Shares
1				
2				
3				
4				
5				
6				
7				

Date Signature & Stamp of Tenderer

If Kenyan Citizen indicate under Citizenship Details whether by Birth, naturalization or Registration.

Name of Contractor/Supplier

Contractors/Supplier 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)