

**ADDENDUM SET 1**
**27<sup>th</sup> November 2024.**

To all Prospective bidders,

---

**REF NO. KRA/HQS/RFP-016/2024-2025 – PROVISION OF SELF-FUNDED  
ADMINISTRATION AND CARE MANAGEMENT SERVICES FOR KENYA  
REVENUE AUTHORITY STAFF FOR A PERIOD OF THREE (3) YEARS**


---

Kenya Revenue Authority wishes to inform prospective applicants of the following amendments/clarifications:

NO.	Tender Document reference	ACTIVITY/QUERY	KRA RESPONSE
1.	ITC 6.2 Page 22	<b>Clause 6.2</b> on the tender data sheet to <b>allow</b> members in a Joint Venture to bid.	We wish to advise prospective bidders that Joint ventures are <b>not</b> permitted for this tender.
2.	ITC 20.1 Page 24	We also request for an extension of the tender closing date by a week. - This will give us enough time to incorporate any changes that may be included in the addendum and finalize on the preparation accordingly.	Prospective bidders are advised that we have revised the tender opening date from 29 <sup>th</sup> November 2024 to <b>Thursday, 5<sup>th</sup> December 2024 at 11.00 a.m.</b>
3.	ITC 22.1 Page 25 Preliminary/ mandatory criteria	Clause 9 & 10 is similar, please consider expunging one.	Prospective bidders are hereby advised that Clause no. 9 has been amended to read as follows:  <b>Submit a copy of the current registration certificate from Insurance Regulatory Authority or a healthcare regulatory body (for the year 2024).</b>  Prospective bidders are also advised that clause 10 has been expunged from the preliminary and mandatory evaluation criteria.
4.	ITC 22.2 Page 26 Clause 1b	Following the Pre-bid session held last week on the 21st Nov 2024, I humbly write to request the update of the below clause under TECHNICAL PROPOSAL EVALUATION, Item 1 pg 26. Technical Evaluation criteria "The Company must have successfully offered similar services to at least five (5) large corporate clients that can best demonstrate past experience within the last three (3) years. The details to be submitted from the clients must include; Name and address of the firm, up to date contact person details."	Prospective bidders are advised that this criterion remains unchanged.

NO.	Tender Document reference	ACTIVITY/QUERY	KRA RESPONSE
		<p>This should be amended to specifically focus on SELF-FUNDED Corporates clients that can demonstrate past experiences since the Tender is specific to PROVISION OF SELF-FUNDED ADMINISTRATION AND CARE MANAGEMENT SERVICES FOR KENYA REVENUE AUTHORITY STAFF FOR A PERIOD OF THREE (3) YEARS.</p> <p>Therefore, our request was as below: "The Company must have successfully offered similar services to at least five (5) large SELF-FUNDED ADMINISTRATION AND CARE MANAGEMENT SERVICES corporate clients that can best demonstrate past experience within the last three (3) years. The details to be submitted from the clients must include; Name and address of the firm, up to date contact person details."</p>	
5.	ITC 22.2 Page 26 Clause 1b	<p>Expertise in handling large corporate Clients. Provide reference letters from the five (5) clients (listed above) stating the number of employees.</p> <p>i. 6,0001 employees and above (2 marks each)</p>	Prospective bidders are hereby advised that this criterion has been amended as per the amended Technical Evaluation Criteria attached to this Addendum as <b>"Annex 1 – Amended Technical Evaluation criteria."</b>
6.	ITC 22.2 Page 26 & 27	<p><b>Part b-</b> We kindly request you to change the wording from 'employees' to 'lives' to read, "Provide reference letters from the five clients (listed above) stating the number of lives."</p> <p><b>Part c-</b> "The firm to provide list of hospital and healthcare provider in 7 counties" - This needs to be expunged as we shall be using the provider panel of KRA with us in providing administration support as per TOR.</p> <p><b>Part d-</b> "Provide evidence of branch network in 47 counties"- This needs to be expunged as this has no</p>	<p>KRA wishes to retain this criterion as is since KRA's current staff establishment is over 9,000 employees.</p> <p>Prospective bidders are guided in the terms of reference the administrator needs to provide their list and on-board new service providers upon KRA's request. <i>"The medical scheme administrator is expected to on-board medical service providers across the country and provide a list of all healthcare service providers in their panel across the 47 counties and the East African region."</i> <b>Page 59 of the Terms of Reference.</b></p> <p>This has been amended from 47 counties to 7 KRA regions. The</p>





NO.	Tender Document reference	ACTIVITY/QUERY	KRA RESPONSE
		justification on the provision of administration services as per the TOR.	regions are as listed in the terms of reference in the tender document. Prospective bidders are therefore advised to use the amended Technical Evaluation Criteria attached to this Addendum marked as <b>"Annex 1 – Amended Technical Evaluation criteria."</b>
		<b>Part e-</b> "Recommendation letters from hospitals"- Also needs to be expunged as the provider panel will be KRA current provider panel based on the agreement in place with us vetting new provider and recommending to KRA for Onboarding based on KRA staff needs.	This requirement has been expunged as a technical evaluation criterion from the bidding document.
		<b>Part f &amp; g-</b> "Demonstrate regional presence & list of hospitals within EAC"- Also needs to be expunged on the basis that the provider panel to be implemented will be the KRA provider panel.	<p>This criterion has been amended, as outlined in the Amended Technical Evaluation Criteria attached to this Addendum as <b>Annex 1 – Amended Technical Evaluation.</b></p> <p>KRA has a presence in the East Africa region; therefore, the requirement is stated in the terms of reference, where the service provider must submit a list of hospitals in the East Africa region (Uganda, Rwanda, and Tanzania) and commit to onboarding new service providers upon KRA's request. Additionally, the service provider must provide proof from the hospitals where services have been offered."</p> <p><i>"The medical scheme administrator is expected to on-board medical service providers across the country and provide a list of all healthcare service providers in their panel across the 47 counties and the East African region."</i> <b>Page 59 of the Terms of Reference in the bidding document.</b></p>
	ITC 22.2 Page 27 Clause 1f, 1g	Are there specific countries that KRA is focusing on, given that there are eight member states in the EAC?	This criterion has been provided because KRA is focusing on expanding its presence in the EAC over the course of a three (3) year contract. Currently, we have staff in Uganda, Tanzania, and Rwanda.
	ITC 22.2 Page 28	<b>9 care managers</b> A minimum qualification Degree/ Diploma from a recognized institution	Prospective bidders are advised to use the amended Technical

NO.	Tender Document reference	ACTIVITY/QUERY	KRA RESPONSE
	Clause 3g	in medical field (MBCHB, Pharmacy, Nursing, Clinical Medicine or any other relevant qualification), registration with a respective regulatory body. Minimum of 5 years' experience in a Clinical setting/Medical insurance/Medical Scheme Administration. The care managers need to be distributed in each KRA region (With at least 2 care managers each for Nairobi & Southern region) <b>i. Bachelor's Degree qualification or higher - 0.6 marks each</b>	Evaluation Criteria attached to this Addendum marked as " <b>Annex 1 – Amended Technical Evaluation criteria.</b> "
	ITC 22.2 Page 28  Clause 3i	<b>4 Client services/Call centre officers</b> A minimum qualification diploma from a recognized institution in medical field (MBCHB, Pharmacy, Nursing, Clinical Medicine or any other relevant qualification), and a minimum of 3 years' experience in Clinical setting/Medical Insurance/Medical Scheme Administration. <b>i. Bachelor's Degree – 1 mark each</b>	Prospective bidders are advised to use the amended Technical Evaluation Criteria attached to this Addendum marked as " <b>Annex 1 – Amended Technical Evaluation criteria</b> attached to this addendum.
7.	ITC 29.4 Page 30	We hereby wish to notify prospective bidders that:  Prior to the award of contract, KRA will conduct due diligence or a post-qualification evaluation to confirm and verify the qualifications of the firm with the highest combined technical and financial scores.	
8.	Terms Reference Page 59-64	of The TORs read that the administrator will be required to integrate with the current biometric service provider.  What happens if we have our own biometric system?  Who is your current biometric system provider?  Under current medical schemes provisions part D, please provide limits of inpatient and outpatient and the population distribution	Prospective bidders are advised to adhere to our scope of service provided in the tender document. Our scope <b>does not</b> include provision of a biometric service provider.  The current biometric system provider is LCT Africa.  Prospective bidders are advised that there is no limit for inpatient or outpatient. The limit is on the cover per family as given in the terms of reference page 63 of the bidding document.
9.	ITC 22.1 Clause no. 4 page 25	As part of the clarifications sought, kindly advise on the format of the tender security as the same is not provided in the tender document, what is provided is the format of the advanced payment bond which is more of a performance bond	The tender security format is attached to this document as Annex 2- TENDER SECURITY FORM.



NO.	Tender Document reference	ACTIVITY/QUERY	KRA RESPONSE
<b>Note:</b> <ul style="list-style-type: none"><li>• Prospective applicants are advised to acknowledge receipt of this addendum on <a href="mailto:eprocurement@kra.go.ke">eprocurement@kra.go.ke</a>.</li><li>• Prospective bidders are advised to take note on the revised opening date i.e. Thursday, 5<sup>th</sup> December 2024 at 11.00a.m.</li><li>• Prospective bidders are requested to align their tender security validity dates to the revised tender closing date i.e. to be valid up to 4<sup>th</sup> December 2025.</li></ul>			

The Addendum form part of the bidding document and is binding to all bidders. All other terms and conditions of the tender remain the same. You are therefore required to immediately acknowledge the receipt of this addendum.

Regards,



Martha Wakio

**For: Deputy Commissioner - Supply Chain Management**



**ANNEX 1 – AMENDED TECHNICAL EVALUTION CRITERIA**

No	Technical Evaluation criteria	Max score
1	<b>The Company must have successfully offered similar services to at least five (5) large corporate clients that can best demonstrate past experience within the last three (3) years. The details to be submitted from the clients must include; Name and address of the firm, up to date contact person details</b>	
a.	Attach documentary evidence for the 5 clients in form of copies of LSO or relevant excerpts of the contracts or award letters. From each of the clients listed above where you have successfully offered similar services. (2 marks each)	10
b.	Expertise in handling large corporate Clients. Provide reference letters from the five (5) clients (listed above) stating the number of employees. i. 6,001 employees and above (2 marks each) ii. 4,001 – 6,000 employees (1.5 marks each) iii. 3,001- 4000 employees (1 mark each) iv. 2,000 – 3,000 employees (0.5 marks each) v. Below 2,000 employees (0 mark)	10
c.	The firm must provide a list of Hospitals and Healthcare Service Providers in your panel/network Coverage that KRA staff can access in the 47 Counties in Kenya and commit to on-board medical service providers on request. i. Coverage in 47 counties – (5 marks) ii. Coverage in 40- 46 counties (4 marks) iii. Coverage in 26- 39 counties (3 marks) iv. Coverage in 11 -25 counties (2 marks) iv. Coverage in 0-10 counties (0 mark)	5
d.	Demonstrate capability to Provide Services in Kenya, i.e Provide Evidence of branch network in at least each KRA region (7 KRA regions) as listed in the terms of reference. The firm will be required to demonstrate their ability to handle medical claims and care management through regional offices across the Country. The evidence of an operational office must be given by a valid lease agreement or business permit. (Note: Limit the copies of lease agreements to a maximum of 4 pages per lease agreement). i. Coverage in at least 7 KRA regions –(4 marks) ii. Coverage in 5-6 KRA regions (3 marks) iii. Coverage in 3-4 KRA regions (2marks) iv. Coverage in 2 KRA regions (1 mark) iv. Coverage in only 1 KRA region (0.5 marks)	4



e.	Demonstrate Presence within the East African region (Uganda, Tanzania & Rwanda). Provide Evidence and List of branch network and demonstrate their ability to handle medical claims and care management through regional offices.	1.5
f.	The firm must provide a list of Hospitals and Healthcare Service Providers in your panel/network Coverage that KRA staff can access in the East African region (Uganda, Tanzania & Rwanda) and commit to on-board medical service providers on request.	1.5
<b>2</b>	<b>Adequacy and quality of the proposed methodology, and work plan in responding to the Terms of Reference (TORs): (use Form Tech 3)</b>	
a.	Describe your understanding to the terms of reference and scope of service	5
b.	Outline the additional benefits to the cover over and above the KRA minimum terms of reference	4
c.	Organization and staffing: prepare an outline of the proposed staff for the assignment.	3
<b>3</b>	<b>Key Experts' qualifications and competence for the Assignment: Candidates must submit CVs and academic certificates/testimonials. Failure to provide this documentation will result in no marks being awarded</b> {Notes to Consultant: each position number corresponds to the same for the Key Experts in Form TECH-6 to be prepared by the Consultant}	
a.	<b>Project/ Team Leader</b>	
	Must have a minimum of a Bachelor's degree plus an Associate of the Chartered Insurance Institute or its equivalent (attach copies of qualification certificates) with not less than ten (10) years' relevant experience. i. Bachelor's Degree qualification or higher - 2 marks ii. Above 10 years of experience - 2 marks; Between 6- 10 years of experience - 1 mark; Below 6 years of experience - 0 marks iii. Professional qualification - 1 mark	5
b.	<b>Relationship Manager</b>	
	Must have a minimum of a Bachelor's degree and relevant insurance qualifications (attach copies of qualification certificates) with not less than ten (10) years' experience as a senior manager in the insurance industry. i. Bachelor's Degree qualification or higher - 1 marks ii. Above 10 years of experience - 2 marks; Between 6- 10 years of experience - 1 mark; Below 6 years of experience - 0 mark iii. Insurance professional qualification - 1 mark	4
c.	<b>Medical Doctor</b>	
	Must be a qualified medical doctor with MBCHB or a related field. With a minimum experience of 5 years.	4



	i. Bachelor's Degree qualification or higher - 1 marks ii. Above 5 years of experience - 2 marks; Between 2- 5 years of experience - 1 mark; Below 2years of experience - 0 mark ii. Valid KMPDC license - 1 mark	
	<b>At least one of the three Key staff (listed above i.e. Project Team Lead, Relationship Manager &amp; Medical Doctor) should be occupational health and safety (OSHA) CERTIFIED (attach valid certificate of approval for the safety and Health Adviser)</b>	1.5
<b>d.</b>	<b>1 Claims Manager</b>	
	A Bachelor's degree from a recognized university in a medical field (MBChB, Pharmacy, Nursing, Clinical Medicine, or a related qualification), registration with the relevant regulatory body, and a minimum of six years' experience in care management or a related field. i. Bachelor's Degree qualification or higher - 1 marks ii. Above 6 years' experience in care management - 2 marks; Between 3-6 years' experience - 1 mark; Below 3 years of experience - 0 mark iii. Valid registration with a regulatory body - 1 mark	4
<b>e.</b>	<b>4 Claims analysts</b>	
	A minimum qualification diploma from a recognized institution in medical field (MBCHB, Pharmacy, Nursing, Clinical Medicine or any other relevant qualification), registration with a relevant regulatory body and a minimum of 5 years' experience in medical claims or a related field. i. Diploma qualification or higher - 0.5 marks each; ii. Above 5 years' relevant experience - 0.5marks each; Between 2-5 years' experience - 0.2 marks each; below 2 years of experience - 0 marks; iii. Valid registration with a regulatory body - 0.5 marks each.	6
<b>f.</b>	<b>1 Head of Care Management</b>	
	A Bachelor's degree from a recognized university in medical field ( MBCHB, Pharmacy, Nursing, Clinical Medicine or any other relevant qualification), registration with a relevant regulatory body and a minimum of 6 years' experience in a clinical setting. i. Bachelor's Degree qualification or higher - 1 marks ii. Above 6 years' experience in care management - 2 marks; Between 3-6 years' experience - 1 mark; Below 3 years of experience - 0 mark iii. Valid registration with a regulatory body - 1 mark	4
<b>g.</b>	<b>9 care managers</b>	
	A minimum qualification Degree/Diploma from a recognized institution in medical field (MBCHB, Pharmacy, Nursing, Clinical Medicine or any other relevant qualification), registration with a respective regulatory body. Minimum of 5 years' experience in a	<b>13.5</b>



	<p>Clinical setting/Medical insurance/Medical Scheme Administration.</p> <p>The care managers need to be distributed in each KRA region (With at least 2 care managers each for Nairobi &amp; Southern region)</p> <p>i. Diploma qualification or higher - 0.6 marks each</p> <p>ii. Above 5 years' experience - 0.5 marks for each care manager; Between 2-5 years' experience - 0.3 marks each; Below 2 years' experience- 0.2 mark each.</p> <p>iii. Valid Registration with a regulatory body - 0.4 marks each</p>	
<b>h.</b>	<b>1 Client services/Call centre Supervisor</b>	
	<p>A bachelor's degree from a recognized university in medical field ( MBCHB, Pharmacy, Nursing, Clinical Medicine or any other relevant qualification), registration with a respective regulatory body and a minimum of 6 years' experience in a clinical setting/ medical centre</p> <p>i. Bachelor's Degree qualification and above- 1 mark</p> <p>ii. Above 6 years' experience in care management - 1 mark; Between 3-6 years experience - 0.5 marks; Below 3 years of experience - 0 mark</p> <p>iii. Registration with a regulatory body - 1 mark</p>	<b>3</b>
<b>i.</b>	<b>4 Client services/Call centre officers</b>	
	<p>A minimum qualification diploma from a recognized institution in medical field (MBCHB, Pharmacy, Nursing, Clinical Medicine or any other relevant qualification), and a minimum of 3 years' experience in Clinical setting/Medical Insurance/ Medical Scheme Administration.</p> <p>i. Diploma qualification or higher – 1 mark each</p> <p>ii. Above 3 years' experience in care management - 1 mark each; Between 1-3 years' experience - 0.5 marks each; Below 1 year of experience - 0 mark</p>	<b>8</b>
<b>j.</b>	<b>1 Business Analyst and reporting</b>	
	<p>A bachelor's degree from a recognized university in Actuarial Science or a business related field with a minimum of 5 years' experience in healthcare business analytics.</p> <p>i. Bachelor's Degree - 0.5 marks</p> <p>ii. Above 6 years' experience in care management - 2marks; Between 3-6 years' experience - 1 mark; Below 3 years of experience - 0 mark</p> <p>iii. Valid Registration with a regulatory body - 0.5 marks</p>	<b>3</b>
	<b>Total score</b>	<b>100</b>
	<b>Cut off score</b>	<b>75</b>



ANNEX 2 - FORM OF TENDER SECURITY

Form of Tender Security -[Option 1–Demand Bank Guarantee]

Beneficiary:\_\_\_\_\_

Request for Tender No:\_\_\_\_\_

Date:\_\_\_\_\_

TENDER GUARANTEE No.:\_\_\_\_\_

Guarantor:\_\_\_\_\_

1. We have been informed that \_\_\_\_\_ (here inafter called "the Applicant") has submitted or will submit to the Beneficiary its Tender (here inafter called" the Tender") for the execution of \_\_\_\_\_ under Request for Tenders No.\_\_\_\_("the ITT").

2. Furthermore, we understand that, according to the Beneficiary's conditions, Tenders must be supported by a Tender guarantee.

3. At the request of the Applicant, we, as Guarantor, hereby irrevocably undertake to pay the Beneficiary any sum or sums not exceeding in total an amount of \_\_\_\_\_(\_\_\_\_\_) upon receipt by us of the Beneficiary's complying demand, supported by the Beneficiary's statement, whether in the demand itself or a separate signed document accompanying or identifying the demand, stating that either the Applicant:

(a) has withdrawn its Tender during the period of Tender validity set forth in the Applicant's Letter of Tender ("the Tender Validity Period"), or any extension thereto provided by the Applicant; or

b) having been notified of the acceptance of its Tender by the Beneficiary during the Tender Validity Period or any extension there to provided by the Applicant, (i) has failed to execute the contract agreement, or (ii) has failed to furnish the Performance.

4. This guarantee will expire: (a) if the Applicant is the successful Tenderer, upon our receipt of copies of the contract agreement signed by the Applicant and the Performance Security and, or (b) if the Applicant is not the successful Tenderer, upon the earlier of (i) our receipt of a copy of the Beneficiary's notification to the Applicant of the results of the Tendering process; or (ii) thirty days after the end of the Tender Validity Period.

5. Consequently, any demand for payment under this guarantee must be received by us at the office indicated above on or before that date.

\_\_\_\_\_  
[Date ]

\_\_\_\_\_  
[Signature of the Guarantor]

\_\_\_\_\_  
[Witness]

\_\_\_\_\_  
[Seal]

*Note: All italicized text is for use in preparing this form and shall be deleted from the final product.*



## FORMAT OF TENDER SECURITY [Option 2–Insurance Guarantee]

TENDER GUARANTEE No.: \_\_\_\_\_

1. Whereas ..... [Name of the tenderer] (hereinafter called “the tenderer”) has submitted its tender dated ..... [Date of submission of tender] for the ..... [Name and/or description of the tender] (hereinafter called “the Tender”) for the execution of \_\_\_\_\_ under Request for Tenders No. \_\_\_\_\_ (“the ITT”).

2. KNOW ALL PEOPLE by these presents that WE ..... of ..... [Name of Insurance Company] having our registered office at ..... (hereinafter called “the Guarantor”), are bound unto ..... [Name of Procuring Entity] (hereinafter called “the Procuring Entity”) in the sum of ..... (Currency and guarantee amount) for which payment well and truly to be made to the said Procuring Entity, the Guarantor binds itself, its successors and assigns, jointly and severally, firmly by these presents.

Sealed with the Common Seal of the said Guarantor this \_\_\_\_\_ day of \_\_\_\_\_ 20 \_\_\_\_.

3. NOW, THEREFORE, THE CONDITION OF THIS OBLIGATION is such that if the Applicant:

a) has withdrawn its Tender during the period of Tender validity set forth in the Principal's Letter of Tender (“the Tender Validity Period”), or any extension thereto provided by the Principal; or

b) having been notified of the acceptance of its Tender by the Procuring Entity during the Tender Validity Period or any extension thereto provided by the Principal; (i) failed to execute the Contract agreement; or (ii) has failed to furnish the Performance Security, in accordance with the Instructions to tenderers (“ITT”) of the Procuring Entity's Tendering document.

then the guarantee undertakes to immediately pay to the Procuring Entity up to the above amount upon receipt of the Procuring Entity's first written demand, without the Procuring Entity having to substantiate its demand, provided that in its demand the Procuring Entity shall state that the demand arises from the occurrence of any of the above events, specifying which event(s) has occurred.

4. This guarantee will expire: (a) if the Applicant is the successful Tenderer, upon our receipt of copies of the contract agreement signed by the Applicant and the Performance Security and, or (b) if the Applicant is not the successful Tenderer, upon the earlier of (i) our receipt of a copy of the Beneficiary's notification to the Applicant of the results of the Tendering process; or (ii) twenty-eight days after the end of the Tender Validity Period.

5. Consequently, any demand for payment under this guarantee must be received by us at the office indicated above on or before that date.

---

[Date]

---

[Signature of the Guarantor]

---

[Witness]

---

[Seal]

