



A PRACTICAL APPLICATION OF THE NEW STANDARD TENDER DOCUMENTS: PREPARATION OF TENDER DOCUMENT FOR PROCUREMENT OF INSURANCE SERVICES

7-11 MARCH, 2022 | 30 CPD POINTS | MERICA HOTEL, NAKURU

TARGET GROUP

Public and private sector organizations, County procurement and supply chain management Directors, Managers, Officers and Assistants, County Secretaries, Executive Committee Members, County Finance Officers and other officials involved in the procurement process.

INTRODUCTION

The Standard Tender Documents (STDs) are published for mandatory use in Procurement by all public sector procuring entities. It is also a best practice for the private sector procuring entities. The STDs contain the formats that support the processes prescribed in the Public Procurement and Asset Disposal Act, 2015 and the Public Procurement and Asset Disposal Regulations, 2020. Diligent application of these STDs fosters compliance, minimizes process and document errors and mitigates costs and risks of appeal and litigation.

This five-day practical workshop is therefore designed to equip participants with necessary skills and knowledge to fully understand how to develop the tender document for procurement of Insurance Services, the challenges encountered in developing the tender documents and how to overcome them.

COURSE OBJECTIVE

By the end of the workshop participants should be able to:

- ❖ Appreciate the statutory requirements for use of standard tender documents;
- ❖ Have a Thorough understanding of the structure and content of the STD Procurement of Insurance Services;
- ❖ Appreciate the areas of the STD for Procurement of Insurance Services that require customization; and
- ❖ Prepare the tender document for procurement of Insurance Services.

COURSE OBJECTIVE

1. An Overview of the Procurement Process.

Procurement planning, development of specifications, requisitioning, preparation of tender documents, invitation to bid, clarifications, submission of bids, opening of bids, evaluation of bids, professional opinion writing, award of tender, notification of intention to award contract, award of contract, execution of contract, contract implementation/ delivery of project and Payment.

WORKSHOP FEES

MEMBER

NON-MEMBER

Ksh. 60,000

PLUS (+) 16% VAT

Ksh. 65,000

PLUS (+) 16% VAT



2. Overview of the STD for Procurement of Insurance Services.

Structure and contents of the STD for procurement of insurance services (preface, appendix to preface, instructions to tenderers, tender data sheet, evaluation and qualification criteria, tendering forms, schedule of requirements, general conditions of contract, special conditions of contract and the Insurance Policy).

3. Preparation of Invitation to Bid.

Services (covers) to be procured, method of procurement, eligible services providers, where and how to obtain the tender documents and applicable charges, tender security requirements, location for tender submission, opening date, time and venue

Practice: Preparation of Invitation to Bid for Procurement of Insurance Services using given data/Case Study.

4. Preparation of Tender Data Sheet.

Instructions to the tenderers (general provisions, preparation of tenders, submission and opening of tenders, evaluation and comparison of tender and award of contract procedures.

Practice: Preparation of tender data sheet for Procurement of Insurance Services.

5. Preparation of Tender Evaluation Criteria

Pre-qualification criteria, eligibility criteria, evaluation criteria, qualification criteria (membership certificate, annual gross premium turnover, past experience, minimum share capital, technical staff, claims management and settlement, credit rating), post-qualification and award criteria; challenges in developing evaluation criteria for procurement of Insurance Services.

Practice: Preparation of tender evaluation Criteria for Procurement of Insurance Services.

6. Preparation of Schedule of Requirements.

Number of items to be insured, description of the items, value of items , major contingencies requiring insurance and insurance/cover period

Practice: Preparation of schedule of requirements/Prices Form for Procurement of Insurance covers.

7. Preparation of Special Conditions of Contract.

Parties to the contract, notices, commencement, completion, coverage duration, liquidated damages and settlement of disputes.

Practice: Preparation of the special conditions of contract for procurement of Insurance covers.

8. Preparation of Notification of Intention to Award Tender.

Contents of the notification of intention to award tender format and customization.

Practice: Preparation of Notification of Intention to award tender for Procurement of Insurance covers using provided evaluation report data.

COURSE DELIVERY

Sessions are interactive. Delivery will be through formal PowerPoint presentation, discussions, Q/A sessions, Exercises, Case Studies and role-plays.

ACCOMMODATION

Participants are required to make their own travel and accommodation arrangements.

WORKSHOP BOOKINGS

Book your space online via: events.kism.or.ke
For further workshop inquiries and registration, please contact: 011 1024800 / 0769 878 227 or email: programs@kism.or.ke

TRAINING CERTIFICATE

An e-certificate of participation will be issued and workshop Presentations sent to participants via email. KISM Members attending the workshop will earn 30 CPD points.

COVID 19 PREVENTIVE MEASURES

1. All participants will be subjected to mandatory body temperature check before entering the training hall.
2. 2.0M social distancing will be maintained throughout the training period.
3. Sufficient sanitizing facilities will be provided at the training venue.
4. Individual participants are urged to take personal responsibility to keep the virus at bay.
5. Individual participants are urged to ensure that the MOH guidelines on management of COVID 19 are observed at their chosen residential places.

PAYMENT OF WORKSHOP FEES

1. No participant will be admitted to the workshop without either of the following documents in regards to payment of the above training fees:
2. Bankers' cheque (Personal cheques will not be accepted), Bank deposit slip, money order, Mpesa payment reference, evidence of funds transfer, or any other evidence of payment.
3. LPO/LSO
4. A commitment letter, from the employer, listing the delegates sent to the workshop and a statement expressing commitment to pay the fees at a later date.