

UKULIMA SACCO SOCIETY LIMITED

TENDER NO. UCSCS/RFP/03/2020 - REQUEST FOR PROPOSAL (RFP) FOR THE SUPPLY, IMPLEMENTATION, TESTING, COMMISSIONING OF A CONTACT CENTER SYSTEM/SOLUTION

COSING DATE : TUESDAY 1ST DECEMBER 2020 AT 1200 NOON

NB: ALL BIDDERS ARE ADVISED TO READ CAREFULLY THIS BID DOCUMENT IN ITS ENTIRETY BEFORE MAKING ANY BID

UKULIMA CO-OPERATIVE SOCIETY
P.O. BOX 44071-00100,
NAIROBI, KENYA.

E-Mail: info@ukulimasacco.coop

Website: www.ukulimasacco.coop

NOVEMBER 2020

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Chemarum Victor

SIGNED FOR: CHIEF EXECUTIVE OFFICER

SECTION I – INVITATION TO BID

DATE: 17/11/2020

TENDER NO. UCSCS/RFP/03/2020 - REQUEST FOR PROPOSAL (RFP) FOR THE SUPPLY, IMPLEMENTATION, TESTING, COMMISSIONING OF A CONTACT CENTER SYSTEM/SOLUTION

- 1.1 Ukulima Sacco invites sealed bids from interested Eligible candidates for the supply, implementation, testing, commissioning of a contact center system/solution.
- 1.2 Interested eligible candidates may obtain further information and inspect the Bid documents from Procurement Office, 4th floor Ukulima Cooperative House, Haile Selassie Avenue, during normal working hours from Monday to Friday (excluding any public or gazetted holiday) between **9.00 a.m. & 12.30 p.m.** and **2.30pm to 4.30pm.**
- 1.3 Prices quoted should be net inclusive of all taxes and delivery costs, must be expressed in Kenya shillings and shall remain valid for a period of **120 days** from the Closing date of the Bid.
- 1.4 Tenders must be accompanied by a tender security of 2% of the tendered sum in form of a Guarantee from a reputable Bank or an insurance company approved by PPRA payable to Ukulima Sacco Society Ltd
- 1.5 Tender document to be charged kshs. 1000/= payable through Ukulima Fosa Nairobi.
- 1.6 The Technical Proposal and Financial proposal are to be put in different envelopes clearly marked "**Technical Proposal**" and "**Financial Proposal**" and sealed in one outer envelope. Completed Request for Proposal documents should be deposited in the Tender box located on the **2nd floor of Ukulima Co-Operative House, Haile Selassie Avenue Nairobi.**
- 1.7 Tenders will be opened immediately thereafter and any candidates representatives who choose to attend the opening is asked to provide their telephone numbers and email numbers with the document to enable us send a link to participate through ZOOM
- 1.8 **to** be addressed to:

**The Chief Executive Officer
Ukulima Sacco
P.O. Box 44071-00100 Nairobi**

To be received on or before Tuesday 1st December **2020 at 12.00 noon.**

- 1.9 Clarifications and/or addendums shall be uploaded only on the Ukulima

Sacco website and sent to the official email addresses of the bidders who have registered. Bidders are advised to periodically check the website for any additional information, clarifications and/or addendums.

- 1.10 The Technical Proposal documents and financial proposals will be opened immediately after the closing time in Ukulima Cooperative house, Nairobi in presence of the Candidates or their representatives who choose to attend the opening through ZOOM.

Chemarum Victor

SIGNED FOR: CHIEF EXECUTIVE OFFICER

SECTION II – INSTRUCTIONS TO BIDDERS.

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SECTION II INSTRUCTIONS TO BIDDERS

2.1 Eligible Bidders

- 2.1.1. This Invitation to Bid is open to all Bidders eligible as described in the invitation to Bid. Successful Bidders shall provide the services for the stipulated duration from the date of commencement (hereinafter referred to as the term) specified in the Bid documents.
- 2.1.2. Ukulima Sacco employees, committee members, board members and their relatives (spouse and children) are not eligible to participate in the Bid unless where specially allowed under section 59 of the public procurement and Asset disposal Act 2015.
- 2.1.3. Bidders shall provide the qualification information statement that the Bidder (including all members, of a joint venture and subcontractors) is not associated, or have been associated in the past, directly or indirectly, with a firm or any of its affiliates which have been engaged by Ukulima Sacco to provide consulting services for the preparation of the design, specifications, and other documents to be used for the procurement of the services under this Invitation for Bids.
- 2.1.4. Bidders involved in corrupt or fraudulent practices or debarred from participating in public procurement shall not be eligible.

2.2 Cost of Bidding

- 2.2.1 The Bidder shall bear all costs associated with the preparation and submission of its Bid, and Ukulima Sacco, will in no case be responsible or liable for those costs, regardless of the conduct or outcome of the Bidding process.
- 2.2.2 The price to be charged for the Bid document shall be Kshs1,000/=
- 2.2.3 Ukulima Sacco shall allow the Bidder to review the Bid document free of charge before purchase.

2.3 Contents of Bid documents

- 2.3.1. The Bid document comprises of the documents listed below and addenda issued in accordance with clause 6 of these instructions to Bids
- i) Instructions to Bidders
 - ii) General Conditions of Contract
 - iii) Special Conditions of Contract
 - iv) Schedule of Requirements
 - v) Details of service

- vi) Form of Bid
- vii) Price schedules
- viii) Contract form
- ix) Confidential business questionnaire form
- x) Bid security form
- xi) Performance security form
- xii) Declaration form

2.3.2. The Bidder is expected to examine all instructions, forms, terms, and Specifications in the Bid documents. Failure to furnish all information required by the Bid documents or to submit a Bid not substantially responsive to the Bid documents in every respect will be at the Bidders risk and may result in the rejection of its Bid.

2.4 Clarification of Documents

2.4.1. A prospective candidate making inquiries of the Bid document may notify Ukulima Sacco in writing or by post, fax or email at the entity's address indicated in the Invitation for Bids. Ukulima Sacco will respond in writing to any request for clarification of the Bid documents, which it receives no later than **seven (7) days** prior to the deadline for the submission of Bids, prescribed by Ukulima Sacco. Written copies of the Ukulima Sacco response (including an explanation of the query but without identifying the source of inquiry) will be sent to all prospective Bidders who have received the Bid documents"

2.4.2. Ukulima Sacco shall reply to any clarifications sought by the Bidder within **three (3) days** of receiving the request to enable the Bidder to make timely submission of its Bid.

2.5 Amendment of documents

2.5.1. At any time prior to the deadline for submission of Bids, Ukulima Sacco, for any reason, whether at its own initiative or in response to a clarification requested by a prospective Bidder, may modify the Bid documents by issuing an addendum.

2.5.2. All prospective Bidders who have obtained the Bid documents will be notified of the amendment by post, fax or email and such amendment will be binding on them.

2.5.3. In order to allow prospective Bidders reasonable time in which to take the amendment into account in preparing their Bids, Ukulima Sacco, at its discretion, may extend the deadline for the submission of Bids.

2.6 Language of Bid

2.6.1. The Bid prepared by the Bidder, as well as all correspondence and

documents relating to the Bid exchanged by the Bidder and Ukulima Sacco, shall be written in English language. Any printed literature furnished by the Bidder may be written in another language provided they are accompanied by an accurate English translation of the relevant passages in which case, for purposes of interpretation of the Bid, the English translation shall govern.

2.7 Documents Comprising the Bid

The Bid prepared by the Bidder shall comprise the following components:

- (a) A Bid Form and a Price Schedule completed in accordance with paragraph 9, 10 and 11 below.
- (b) Documentary evidence established in accordance with Clause 2.11 that the Bidder is eligible to Bid and is qualified to perform the contract if its Bid is accepted;
- (c) Bid security furnished is in accordance with Clause 2.12
- (d) Confidential business questionnaire

2.8 Form of Tender

2.8.1 The Bidders shall complete the Form of Tender and the appropriate Price Schedule furnished in the Bid documents, indicating the services to be performed.

2.9 Bid Prices

- 2.9.1 The Bidder shall indicate on the Price schedule the unit prices where applicable and total Bid prices of the services it proposes to provide under the contract.
- 2.9.2 Prices indicated on the Price Schedule shall be the cost of the services quoted including all customs duties and VAT and other taxes payable:
- 2.9.3 Prices quoted by the Bidder shall remain fixed during the term of the contract unless otherwise agreed by the parties. A Bid submitted with an adjustable price quotation will be treated as non-responsive and will be rejected, pursuant to paragraph 2.22.
- 2.9.4 Contract price variations shall not be allowed for contracts not exceeding one year (12 months)
- 2.9.5 Where contract price variation is allowed, the variation shall not exceed 25% of the original contract price.
- 2.9.6 Price variation requests shall be processed by Ukulima Sacco within 30 days of receiving the request.

2.10 Bid Currencies

2.10.1 Prices shall be quoted in Kenya Shillings unless otherwise specified in the appendix to in Instructions to Bidders.

2.11 Bidders Eligibility and Qualifications.

2.11.1 Pursuant to Clause 2.1 the Bidder shall furnish, as part of its Bid, documents establishing the Bidders eligibility to Bid and its qualifications to perform the contract if its Bid is accepted.

2.11.2 The documentary evidence of the Bidders qualifications to perform the contract if its Bid is accepted shall establish to Ukulima Sacco satisfaction that the Bidder has the financial and technical capability necessary to perform the contract.

2.12 Bid Security

2.12.1 The Bidder shall furnish, as part of its Bid, a Bid security for the amount and form specified in the Invitation to Bid.

2.12.2 The Bid security shall be in the amount not exceeding 2 per cent of the Bid price.

2.12.2 The Bid security is required to protect Ukulima Sacco against the risk of Bidder's conduct which would warrant the security's forfeiture, pursuant to paragraph 2.12.7

2.12.3 The Bid security shall be denominated in a Kenya Shillings or in another freely convertible currency and shall be in the form of a **bank guarantee**.

2.12.4 Any Bid not secured in accordance with paragraph 2.12.1 and 2.12.3 will be rejected by Ukulima Sacco as non-responsive, pursuant to paragraph 2.20

2.12.5 Unsuccessful Bidder's security will be discharged or returned as promptly as possible, but not later than thirty (30) days after the expiration of the period of Bid validity prescribed by Ukulima Sacco.

2.12.6 The successful Bidder's Bid security will be discharged upon the Bidder signing the contract, pursuant to paragraph 2.29, and furnishing the performance security, pursuant to paragraph 2.30.

2.12.7 The Bid security may be forfeited:

- (a) If a Bidder withdraws its Bid during the period of Bid validity specified by Ukulima Sacco on the Bid Form; or
- (b) In the case of a successful Bidder, *if* the Bidder fails:

- (i) to sign the contract in accordance with paragraph 30 or
- (ii) to furnish performance security in accordance with paragraph 31.

(c) If the Bidder rejects, correction of an error in the Bid.

2.13 Validity of Bids

2.13.1 Bids shall remain valid for **120 days** or as specified in the invitation to Bid after date of Bid opening prescribed by Ukulima Sacco, pursuant to paragraph 2.18. Ukulima Sacco shall reject a Bid valid for a shorter period as non-responsive.

2.13.2 In exceptional circumstances, Ukulima Sacco may solicit the Bidder's consent to an extension of the period of validity. The request and the responses thereto shall be made in writing. The Bid security provided under paragraph 2.12 shall also be suitably extended. A Bidder may refuse the request without forfeiting its Bid security. A Bidder granting the request will not be required nor permitted to modify its Bid.

2.14 Format and Signing of Bid

2.14.1 The Bidder shall prepare two copies of the Bid, clearly / marking each "**ORIGINAL BID**" and "**COPY OF BID**," as appropriate. In the event of any discrepancy between them, the original shall govern.

2.14.2 The original and all copies of the Bid shall be typed or written in indelible ink and shall be signed by the Bidder or a person or persons duly authorized to bind the Bidder to the contract. All pages of the Bid, except for unamended printed literature, shall be initialed by the person or persons signing the Bid.

2.14.3 The Bid shall have no interlineations, erasures, or overwriting except as necessary to correct errors made by the Bidder, in which case such corrections shall be initialed by the person or persons signing the Bid.

2.15 Sealing and Marking of Bids

2.15.1 The original proposal (Technical Proposal and, if required, Financial Proposal) shall be prepared in indelible ink. It shall contain **no interlineations 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.

2.15.2 For each proposal, the Bidders 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.

2.15.3 The original and all copies of the Technical Proposal shall be placed in a sealed envelope clearly marked "**TECHNICAL PROPOSAL**," and the original and all copies of the Financial Proposal in a sealed envelope clearly marked "**FINANCIAL PROPOSAL**" and warning: "**DO NOT OPEN BEFORE TUESDAY 1ST DECEMBER 2020**." Both envelopes shall be placed into an outer envelope and sealed. This outer envelope shall bear the submission address.

2.15.4 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.

2.15.5 After the deadline for submission of proposals, the Technical and financial Proposal shall be opened immediately by the opening committee.

2.15.6 Deadline for Submission of Bids

2.16.1 Bids must be received by Ukulima Sacco at the address specified under paragraph 2.15.2 no later than Tuesday 1st December 2020 at Noon

2.16.2 Ukulima Sacco Society Ltd may, at its discretion, extend this deadline for the submission of Bids by amending the Bid documents in accordance with paragraph 6, in which case all rights and obligations of Ukulima Sacco and candidates previously subject to the deadline will thereafter be subject to the deadline as extended.

2.16.3 Bulky Bids which will not fit in the Bid box shall be received by Ukulima Sacco at the CEO'S office 2nd floor room 27.

2.16 Modification and withdrawal of Bids

2.17.1 The Bidder may modify or withdraw its Bid after the Bid's submission, provided that written notice of the modification, including substitution or withdrawal of the Bid's is received by Ukulima Sacco prior to the deadline prescribed for the submission of Bids.

2.17.2 The Bidder's modification or withdrawal notice shall be prepared, sealed, marked, and dispatched in accordance with the provisions of paragraph 2.15. A withdrawal notice may also be sent by cable, but followed by a signed confirmation copy, postmarked no later than the deadline for submission of Bids.

2.17.3 No Bid may be modified after the deadline for submission of Bids.

2.17.4 No Bid may be withdrawn in the interval between the deadline for

submission of Bids and the expiration of the period of Bid validity specified by the Bidder on the Bid Form. Withdrawal of a Bid during this interval may result in the Bidder's forfeiture of its Bid security, pursuant to paragraph 2.12.7.

- 2.17.5 Ukulima Sacco may at any time terminate procurement proceedings before contract award and shall not be liable to any person for the termination.
- 2.17.6 Ukulima Sacco shall give prompt notice of the termination to the Bidders and on request give its reasons for termination within 14 days of receiving the request from any Bidder.

2.17 Opening of Bids

- 2.18.1 Ukulima Sacco will open all Bids in the presence of Bidders' representatives who choose to attend the opening through ZOOM, on Tuesday 1st December 2020 at Noon. and in the location specified in the invitation to Bid. The Bidders' representatives who are present shall register through Zoom evidencing their attendance.
- 2.18.3 The Bidders' names, bid modifications or withdrawals, Bid prices, discounts, and the presence or absence of requisite Bid security and such other details as Ukulima Sacco, at its discretion, may consider appropriate, will be announced at the opening.

2.18 Clarification of Bids

- 2.19.1 To assist in the examination, evaluation and comparison of Bids Ukulima Sacco may at its discretion, ask the Bidder for a clarification of its Bid. The request for clarification and the response shall be in writing, and no change in the prices or substance shall be sought, offered, or permitted.
- 2.19.2 Any effort by the Bidder to influence Ukulima Sacco in Ukulima Sacco's Bid evaluation, bid comparison or contract award decisions may result in the rejection of the Bidders Bid.

Comparison or contract award decisions may result in the rejection of the Bidders' Bid.

2.19 Preliminary Examination and Responsiveness

- 2.20.1 Ukulima Sacco will examine the Bids to determine whether they are complete, whether any computational errors have been made, whether required securities have been furnished whether the documents have been properly signed, and whether the Bids are generally in order.

- 2.20.2 Arithmetical errors will be rectified on the following basis. If there is a discrepancy between the unit price and the total price that is obtained by multiplying the unit price and quantity, the unit price shall prevail, and the total price shall be corrected. If the candidate does not accept the correction of the errors, its Bid will be rejected, and its Bid security may be forfeited. If there is a discrepancy between words and figures, the amount in words will prevail.
- 2.20.3 Ukulima Sacco may waive any minor informality or nonconformity or irregularity in a Bid which does not constitute a material deviation, provided such waiver does not prejudice or affect the relative ranking of any Bidder.
- 2.20.4 Prior to the detailed evaluation, pursuant to paragraph 23, Ukulima Sacco will determine the substantial responsiveness of each Bid to the Bid documents. For purposes of these paragraphs, a substantially responsive Bid is one which conforms to all the terms and conditions of the Bid documents without material deviations. Ukulima Sacco's determination of a Bid's responsiveness is to be based on the contents of the Bid itself without recourse to extrinsic evidence.
- 2.20.5 If a Bid is not substantially responsive, it will be rejected by Ukulima Sacco and may not subsequently be made responsive by the Bidder by correction of the nonconformity.

2.20 Conversion to a single currency

- 2.21.1 Where other currencies are used, Ukulima Sacco will convert those currencies to Kenya shillings using the selling exchange rate on the date of Bid closing provided by the central bank of Kenya.

2.21 Evaluation and comparison of Bids.

- 2.22.1 Ukulima Sacco will evaluate and compare the Bids which have been determined to be substantially responsive, pursuant to paragraph 2.20
- 2.22.2 The comparison shall be of the price including all costs as well as duties and taxes payable on all the materials to be used in the provision of the services.
- 2.22.3 Ukulima Sacco's evaluation of a Bid will take into account, in addition to the Bid price, the following factors, in the manner and to the extent indicated in paragraph 2.22.4 and in the technical specifications:
- 2.22.4 and in the technical specifications:
- (a) Operational plan proposed in the Bid.
 - (b) Deviations in payment schedule from that specified in the Special Conditions of Contract.

2.22.4 Pursuant to paragraph 22.3 the following evaluation methods will be applied:

(a) Operational Plan.

Ukulima Sacco Society Ltd requires that the services under the Invitation for Bids shall be performed at the time specified in the Schedule of Requirements. Bids offering to perform longer than Ukulima Sacco's required delivery time will be treated as non-responsive and rejected.

(b) Deviation in payment schedule.

Bidders shall state their Bid price for the payment on a schedule outlined in the special conditions of contract. Bids will be evaluated on the basis of this base price. Bidders are, however, permitted to state an alternative payment schedule and indicate the reduction in Bid price they wish to offer for such alternative payment schedule. Ukulima Sacco may consider the alternative payment schedule offered by the selected Bidder.

2.22.5 The Bid evaluation committee shall evaluate the Bid within 30 days from the date of opening the Bid.

2.22.6 To qualify for contract awards, the Bidder 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.

2.23. Contacting Ukulima Sacco

2.23.1 Subject to paragraph 2.19, no Bidder shall contact Ukulima Sacco on any matter relating to its Bid, from the time of the Bid opening to the time the contract is awarded.

2.23.2 Any effort by a Bidder to influence Ukulima Sacco in its decisions on Bid evaluation, bid comparison or contract award may result in the rejection of the Bidders Bid.

2.24 Award of Contract

a) Post qualification

- 2.24.1 In the absence of pre-qualification, Ukulima Sacco will determine to its satisfaction whether the Bidder that is selected as having submitted the lowest evaluated responsive Bid is qualified to perform the contract satisfactorily.
- 2.24.2 The determination will take into account the Bidder's financial and technical capabilities. It will be based upon an examination of the documentary evidence of the Bidders qualifications submitted by the Bidder, pursuant to paragraph 2.1.2, as well as such other information as Ukulima Sacco deems necessary and appropriate.
- 2.24.3 An affirmative determination will be a prerequisite for award of the contract to the Bidder. A negative determination will result in rejection of the Bidder's Bid, in which event Ukulima Sacco will proceed to the next lowest evaluated Bid to make a similar determination of that Bidder's capabilities to perform satisfactorily.

b) Award Criteria

- 2.24.3 Subject to paragraph 2.29 Ukulima Sacco will award the contract to the successful Bidder whose Bid has been determined to be substantially responsive and has been determined to be the lowest evaluated Bid, provided further that the Bidder is determined to be qualified to perform the contract satisfactorily.
- 2.24.4 Ukulima Sacco reserves the right to accept or reject any Bid and to annul the Bidding process and reject all Bids at any time prior to contract award, without thereby incurring any liability to the affected Bidder or Bidders or any obligation to inform the affected Bidder or Bidders of the grounds for Ukulima Sacco's action. If Ukulima Sacco determines that none of the Bidders is responsive; Ukulima Sacco shall notify each Bidder who submitted a Bid.
- 2.24.5 A Bidder who gives false information in the Bid document about its qualification or who refuses to enter into a contract after notification of contract award shall be considered for debarment from participating in future public procurement.

2.25 Notification of award

- 2.25.1 Prior to the expiration of the period of Bid validity, Ukulima Sacco will notify the successful Bidder in writing that its Bid has been accepted.
- 2.25.2 The notification of award will signify the formation of the Contract subject to the signing of the contract between the Bidder and Ukulima Sacco pursuant to clause 2.29. Simultaneously the other Bidders shall be notified that their Bids have not been successful.

2.25.3 Upon the successful Bidder's furnishing of the performance security pursuant to paragraph 31, Ukulima Sacco will promptly notify each unsuccessful Bidder and will discharge its Bid security, pursuant to paragraph 2.12

2.26 Signing of Contract

2.26.1 At the same time as Ukulima Sacco notifies the successful Bidder that its Bid has been accepted, Ukulima Sacco will simultaneously inform the other Bidders that their Bids have not been successful.

2.26.2 Within fourteen (14) days of receipt of the Contract Form, the successful Bidder shall sign and date the contract and return it to Ukulima Sacco.

2.26.3 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.

2.27 Performance Security

2.27.1 Within thirty (30) days of the receipt of notification of award from Ukulima Sacco, the successful Bidder shall furnish the performance security in accordance with the Conditions of Contract, in the Performance Security Form provided in the Bid documents, or in another form acceptable to Ukulima Sacco.

2.27.2 Failure of the successful Bidder to comply with the requirement of paragraph 2.29 or paragraph 2.30.1 shall constitute sufficient grounds for the annulment of the award and forfeiture of the Bid security, in which event Ukulima Sacco may make the award to the next lowest evaluated or call for new Bids.

2.28 Corrupt or Fraudulent Practices

2.28.1 Ukulima Sacco requires that Bidders observe the highest standard of ethics during the procurement process and execution of contracts. A Bidder shall sign a declaration that he has not and will not be involved in corrupt or fraudulent practices.

2.28.2 Ukulima Sacco will reject a proposal for award if it determines that the Bidder recommended for award has engaged in corrupt or fraudulent practices in competing for the contract in question.

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

APPENDIX TO INSTRUCTIONS TO BIDDERS

The following information regarding particulars of the Bid shall complement or amend the provisions of the instructions to Bidders. Wherever there is a conflict between the provisions of the instructions to Bidders and the provisions of the appendix, the provisions of the appendix herein shall prevail over those of the instructions to Bidders.

Instructions to Bidders	Particulars of appendix to instructions to Bidders
2.1 Eligibility	Particulars of eligible Bidders Service providers offering Contact Center solution, registered in Kenya and meeting all statutory requirements.
2.4 clarification request	Bidders seeking clarification must send the request to info@ukulimasacco.coop This must be received not less than 7 days prior to Bid closure. All issued clarification/addenda will be uploaded on the website Bidders are advised to be checking the website from time to time for any information before their submission of the bid.
2.10 Bid Currencies	Particulars of other currencies allowed. Price should be in Kenya shillings only or any other freely convertible currency
2.12 - Bid security	Bid security required is KES. 2% of the tendered sum in form of a bank guarantee from a reputable bank in Kenya registered by the Central Bank of Kenya valid for 120 days from Bid closing date.
2.13.1 Bid validity	Bid shall remain valid for a period of 120 days from the date of Bid opening.
2.15 Submission, Receipt, and Opening of Proposals	Bidders must submit an original copy of each of the Technical and Financial proposal clearly marked ORIGINAL and 1 other copy of each of the Technical and Financial proposal marked COPY all placed in one envelope and Bid name and number and closing date clearly written on top of the envelope.
2.16 Deadline for submission of Bids	Deadline for Submission of Bids /Closing date shall be Tuesday 1 st December 2020 at Noon.
2.24 Due diligence	Ukulima Sacco may at its own discretion conduct due diligence on the eligible bidders to establish their ability to perform the contract

EVALUATION CRITERIA

Ukulima Sacco will consider the following three categories of criteria to evaluate the Bids;

Stage 1. Compliance to Mandatory requirement

Stage 2. Compliance to technical requirements on capacity to deliver the contract.

Stage 3. Financial evaluation

Stage 4. Due Diligence

1. MANDATORY REQUIREMENTS

The following mandatory requirements must be met notwithstanding other requirements in the Bid document: This stage shall be evaluated on a PASS/FAIL basis.

No.	Documents to be submitted	PASS/FAIL
1.	1 Original and 1 copy of Bid document MUST be paginated/serialized/Numbered sequentially on all pages including attachments from the beginning of the document to the end. This includes ALL the attachments submitted by the bidder and ALL the pages already paginated by Ukulima Sacco.	
2.	Submit an original Bid security of kshs 2% of the tendered sum in form of unconditional bank guarantee from a reputable bank in Kenya registered by the Central Bank of Kenya valid for 120 days from the date of Bid opening	
3.	Confirmation of Directors (CR. 12) for companies - Issued within three months from the Bid closing date.	
4.	Submission of Copy of Certificate of Incorporation/Registration	
5.	Submission of Valid Tax compliance certificate (Expired tax compliance certificates will not be accepted)	
6.	Must be accredited by the ICT Authority to provide ICT software solutions.	
7.	Duly filled, signed and stamped Technical proposal submission form	
8.	Dully filled, signed and stamped Confidential Business Questionnaire.	
9.	Dully filled, signed and stamped Declaration form	
10.	Certified copies of two years audited accounts (2018 & 2019)	

Important Note:

The Bidders who do not satisfy any of the above requirements shall be considered as non-responsive and will not be evaluated further.

TECHNICAL EVALUATION CRITERIA

a) Technical evaluation criteria will be as follows: -

NO	CRITERIA	Maximum points	Bidders Score
1.	Organizational experience	2.5	
	1.1. Company Profile plus organogram		
	1.2. Provide certification details of local or international bodies such as ISO or Gartner certification on the development of contact center software solutions and IT services.	2.5	
	<p>Organizational profiles Information may include, but not limited to, organizational size, countries of operation, achievements and awards, areas of focus and solutions, certifications, number of resources, key clients etc.</p> <p>Proposed team structure and CVs for proposed project resources Bidders must provide list of proposed project resources, citing qualifications and experience, and covering all relevant areas of specializations. As a minimum, Bidders are required to provide detailed curriculum vitae of at least 3 people with previous, similar engagements. In addition, project teams must indicate all relevant project roles, including, but not limited to project director, project manager, functional consultants, technical consultants, trainers, testers, specialists etc.</p>	5	
	Provide five (5) reference for projects undertaken from five (5) corporate clients of similar scope and scale that have been delivered by your company, one of which MUST be a Sacco. For each provide recommendation letters and in client letter head. (2 points each, maximum 10)	10	
	<p>Approach and methodology This will be limited to a maximum of 5 pages. Approach and methodology will also include a detailed work-plan, which (as a minimum) outlines the following for each project phase (and sub phase where necessary):</p> <ol style="list-style-type: none"> 1. Key activities to be carried out; 2. Proposed timelines (based on experience from similar projects) 	50	

3. Nature of projects resources required 4. Training 5. User signoffs 6. Deliverables		
Detailed system and technical requirements Bidders must provide, detailed responses to Ukulima Sacco system and technical requirements, as these will form a critical part of the contract with the successful Bidder	15	
Additional guidance RFP proposal responses, including any supporting documentation, should be prepared in the English language. Material deficiencies in providing requested information may result in rejection of a Bidder's RFP response.	10	
4. Physical address (Evidence of physical address and premises - ownership document/Lease Agreement)	5	
Total	100	

Important note: Bidders scoring 70% and above in the technical evaluation will be invited to make a 45 minutes' presentation.

b) Further Technical Evaluation Criteria: Company presentation - Maximum 30 points.

As part of the technical scoring evaluation, the presentation by the bidders will form a substantial component of the process to identify the best suited media agency to provide media and advertising services as specified in the details of services and in Appendix 1. Ukulima Sacco will give a presentation brief to the successful bidders who score 70 points and above in the technical evaluation at least seven clear days prior to the day they will make the presentation.

The scoring criteria will focus on how best the presentation demonstrates the uniqueness of approach and efficient delivery and effectiveness of the system.

2. FINANCIAL EVALUATION

- i. Only those bids which meet ALL the above requirements will be considered for financial evaluation.
- ii. All items **MUST** be quoted for.
- iii. Checking for errors.
- iv. Checking for fully filled, signed and stamped financial proposal submission form.

v. The lowest evaluated bidder on all items rates/cost will be recommended for award.

3. DUE DILIGENCE

Ukulima Sacco may visit the premises to confirm the details and/or contact the references provided by the bidder for more information.

SECTION III GENERAL CONDITIONS OF CONTRACT

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SECTION III GENERAL CONDITIONS OF CONTRACT

3.1 Definitions

In this contract the following terms shall be interpreted as indicated:

- a) "The contract" means the agreement entered into between Ukulima Sacco and the Bidder as recorded in the Contract Form signed by the parties, including all attachments and appendices thereto and all documents incorporated by reference therein.
- b) "The Contract Price" means the price payable to the Bidder under the Contract for the full and proper performance of its contractual obligations.
- c) "The services" means services to be provided by the contractor including materials and incidentals which the Bidder is required to provide to Ukulima Sacco under the Contract.
- d) "Ukulima Sacco Society Ltd" means the organization sourcing for the services under this Contract.
- e) "The contractor means the individual or firm providing the services under this Contract.
- f) "GCC" means general conditions of contract contained in this section
- g) "SCC" means the special conditions of contract
- h) "Day" means calendar day

3.2 Application

These General Conditions shall apply to the extent that they are not superseded by provisions of other part of contract.

3.3 Standards

3.3.1 The services provided under this Contract shall conform to the 7 standards mentioned in the Schedule of requirements.

3.5 Patent Right's

The Bidder shall indemnify Ukulima Sacco against all third-party claims of infringement of patent, trademark, or industrial design rights arising from use of the services under the contract or any part thereof.

3.6 Performance Security

Within twenty-eight (28) days of receipt of the notification of Contract award, the successful Bidder shall furnish to Ukulima Sacco the performance security where applicable in the amount specified in Special Conditions of Contract.

- 3.6.2 The proceeds of the performance security shall be payable to Ukulima Sacco as compensation for any loss resulting from the Bidder's failure to complete its obligations under the Contract.
- 3.6.3 The performance security shall be denominated in the currency of the Contract or in a freely convertible currency acceptable to Ukulima Sacco and shall be in the form of a **bank guarantee**.
- 3.6.4 The performance security will be discharged by Ukulima Sacco and returned to the candidate not later than thirty (30) days following the date of completion of the Bidder's performance of obligations under the contract, including any warranty obligations under the contract.

3.7 Inspections and Tests

- 3.7.1 Ukulima Sacco or its representative shall have the right to inspect and/or to test the services to confirm their conformity to the Contract specifications. Ukulima Sacco shall notify the Bidder in writing, in a timely manner, of the identity of any representatives retained for these purposes.
- 3.7.2 The inspections and tests may be conducted on the premises of the Bidder or its subcontractor(s). If conducted on the premises of the Bidder or its subcontractor(s), all reasonable facilities and assistance, including access to drawings and production data, shall be furnished to the inspectors at no charge to Ukulima Sacco.
- 3.7.3 Should any inspected or tested services fail to conform to the Specifications, Ukulima Sacco may reject the services, and the Bidder shall either replace the rejected services or make alterations necessary to meet specification requirements free of cost to Ukulima Sacco.
- 3.7.4 Nothing in paragraph 3.7 shall in any way release the Bidder from any warranty or other obligations under this Contract.

3.8 Payment

- 3.8.1 The method and conditions of payment to be made to the Bidder under this Contract shall be specified in SCC

3.9 Prices

Prices charged by the contractor for services performed under the Contract shall not, with the exception of any Price adjustments authorized in SCC, vary from the prices by the Bidder in its Bid or in Ukulima Sacco's request for Bid validity extension as the case may be. No variation in or

modification to the terms of the contract shall be made except by written amendment signed by the parties.

3.10. Assignment

The Bidder shall not assign, in whole or in part, its obligations to perform under this contract, except with Ukulima Sacco's prior written consent.

3.11 . Termination for Default

Ukulima Sacco may, without prejudice to any other remedy for breach of Contract, by written notice of default sent to the Bidder, terminate this Contract in whole or in part:

- a) If the Bidder fails to provide any or all of the services within the period(s) specified in the Contract, or within any extension thereof granted by Ukulima Sacco.
- b) If the Bidder fails to perform any other obligation(s) under the Contract.
- c) If the Bidder, in the judgment of Ukulima Sacco has engaged in corrupt or fraudulent practices in competing for or in executing the Contract.

In the event Ukulima Sacco terminates the Contract in whole or in part, it may procure, upon such terms and in such manner as it deems appropriate, services similar to those undelivered, and the Bidder shall be liable to Ukulima Sacco for any excess costs for such similar services.

3.12 Termination of insolvency

Ukulima Sacco may at the anytime terminate the contract by giving written notice to the contractor if the contractor becomes bankrupt or otherwise insolvent. In this event, termination will be without compensation to the contractor, provided that such termination will not produce or affect any right of action or remedy, which has accrued or will accrue thereafter to Ukulima Sacco.

3.13 Termination for convenience

3.13.1 Ukulima Sacco by written notice sent to the contractor may terminate the contract in whole or in part, at any time for its convenience. The notice of termination shall specify that the termination is for Ukulima Sacco convenience, the extent to which performance of the contractor of the contract is terminated and the date on which such termination becomes effective.

3.13.2 For the remaining part of the contract after termination Ukulima Sacco may elect to cancel the services and pay to the contractor on agreed amount for partially completed services.

3.14 Resolution of disputes

Ukulima Sacco's and the contractor shall make every effort to resolve amicably by direct informal negotiations any disagreement or dispute arising between them under or in connection with the contract.

If after thirty (30) days from the commencement of such informal negotiations both parties have been unable to resolve amicably a contract dispute either party may require that the dispute be referred for resolution to the formal mechanisms specified in the SCC.

3.15 Governing Language

The contract shall be written in the English language. All correspondence and other documents pertaining to the contract, which are exchanged by the parties, shall be written in the same language.

3.16 Force Majeure

The contractor shall not be liable for forfeiture of its performance security, or termination for default if and to the extent that it's delay in performance or other failure to perform its obligations under the Contract is the result of an event of Force Majeure.

3.17 Applicable Law

The contract shall be interpreted in accordance with the laws of Kenya unless otherwise specified in the SCC

3.18 Notices

Any notices given by one party to the other pursuant to this contract shall be sent to the other party by post or by fax or E-mail and confirmed in writing to the other party's address specified in the SCC

A notice shall be effective when delivered or on the notices effective date, whichever is later.

SECTION IV: SPECIAL CONDITIONS OF CONTRACT

- 4.1. Special conditions of contract shall supplement the general conditions of contract, wherever there is a conflict between the GCC and the SCC, the provisions of the SCC herein shall prevail over those in the GCC.
- 4.2. Special conditions of contract with reference to the general conditions of contract.

General conditions of contract reference	Special conditions of contract
3.6 Performance security	A performance security of 10% of the total contract price in the form of a bank guarantee from a reputable commercial bank Registered by Central Bank of Kenya will be required from the winning bidder.
3.8 Payment	Payment will be done within 30 days on receipt of certified invoice and upon determination to Ukulima Sacco's satisfaction that the services were offered as per the contract terms.
3.9 Prices Adjustment Clause	Price adjustments shall not be allowed for the entire contract period
3.14 Resolution of disputes	In case of a dispute between the purchaser and the supplier and incase of failure to amicably solve issues, the dispute shall be referred to the adjudication or arbitration in accordance with the laws of Kenya.
3.17 Applicable law	Contract shall be interpreted in accordance with the laws of Kenya

SECTION V - DESCRIPTION OF SERVICES

This part includes all deliverables under the service contract

Clause	
5.0.	Call Centre and Case management Solution Requirement
I	The proposed system should be based on Service Oriented Architecture and should support granular web-services API for flexible service delivery
II	The system should support to run on , MS windows, UNIX, Linux systems.
III	The system should support multiple virtual contact center based on one physical contact center platform; each VCC have their independent management, reports and dynamic resources.
IV	Call center solution should support multiple languages over the user interface (Agent, Administrator, Supervisor)
V	Application should support multi-channel capabilities to cater to the channels like emails, voice, chat, Facebook and Twitter on a single agent interface
VI	The application / solution should have a provision of including chat from mobile app or website on single agent interface.
VII	Call Centre solution should be capable of integrating with various third party CRMs with use of web-services API and standard connectors (based on web-services API).
VIII	Vendor should demonstrate integration to social media tools (Facebook, Twitter, LinkedIn etc.)
IX	Vendor should demonstrate ability for cross selling of products and services between existing customers
X	Vendor should demonstrate customers' ability to login complaints and enquiries online via web through a self-service portal.
XI	Vendor should demonstrate capabilities of knowledgebase and reuse of best practice
XII	Vendor should demonstrate capabilities of case escalation based on pre-set escalation matrix
XIII	Vendor should demonstrate how the solutions should be multichannel where customers can engage i.e. emails, SMS, phone calls, website portal, customer walk-inn etc.
XIV	Vendor should demonstrate detailed dashboards and MIS reports
XV	Vendor should demonstrate back office workflow to different departments
5.1	Eligibility Criteria
XVI	The vendor should have an experience of 5 years supporting such Technology (please share case-study and reference of 2 customers (with contact details) within the region
XVII	The vendor should be recognized by reputed Industry /Certification bodies or research firms (likes of Gartner, Deloitte, Frost & Sullivan, TMCNet, Nasscom, CMMI, PDSS, ISO etc.). List any two such certifications achieved by the vendor

XVIII	The vendor should have experience in implementing such a solution in another site
XIX	The Provider should have the capability to provide both On Premise and Cloud Solution.
XX	There should be no self-life of the system. All updates and upgrades should be part of solution. i.e. There should be no compulsion to upgrade to a different product in future but the system should provide updates/upgrades at no additional cost.
XXI	Should consist of open-standard and open-platforms and should not require use of proprietary technology i.e. the system should be based on a non-standard telephony protocol for calls between telephone/PC with systems. The system should not be mandating use of a particular 3rd party system like CBS, CRM or a DB but should be able to integrate with use of open-standard protocols and APIs.
XXII	No proprietary hardware should be required. The system should be able to work on COTS (Commercially off the shelf) server machines as processing power and should not require any one particular proprietary hardware as compulsion
5.2	Interactive Voice Response (IVR) Functions
I	The proposed system should provide Interactive Voice Response function to support automatic service to reduce the cost of manual service.
II	The proposed system should provide the unified IVR portal for different set of callers
III	IVR should support the transfer of call to agent and agent to IVR as many times as required
IV	IVR should be capable of handling integrations with third party system for assisting self service
V	The agent can transfer the call to the specified IVR menu.
VI	The proposed system should provide the data for analysis of traversed IVR
VII	IVR solution must allow the creation and modification of IVR messages at administration/supervisor level
VIII	The proposed system should be capable of announcing numbers, digits, currency without the need of a TTS (Text To Speech) Engine
IX	The proposed system should be compatible for multiple language support like English and others
X	The proposed system must be able to understand DTMF signals
XI	The proposed system should have the capability for load balancing
XII	The proposed system should have the capability to support Text-to Speech via standard protocols (MRCP/2.0 in particular)
XIII	The proposed system should have capability to support Automatic Speech Recognition via standard protocols (MRCP/2.0 in particular)

XIV	The proposed system should have the capability to send SMS/ Email over certain events on IVR
XV	IVR should have the ability to incorporate office hours functionality i.e. System should be able to provide office hours integration wherein if the call is received after the office hours, the system should play the after office hours IVR Flow
XVI	IVR should be based out of XML
XVII	The proposed system should be capable to provide a GUI interface to allow customization in IVR flow
XVIII	IVR designer should have the following functionalities
XIX	IVR designer should be a GUI based drag-drop configure tool.
XX	The grammar for IVR should be object-oriented i.e. one can implement a sub-IVR flow and include it in larger flow with input parameters as applicable in an object-oriented programming language.
XXI	IVR designer should facilitate implementation with CTI, ACD, Dialler or third-party systems using web-services or odbc/jdbc rather need of custom development. i.e. the system should facilitate passing a customer input collected at IVR to CTI/ ACD without need to do any custom programming/scripting but from IVR designer itself
XXII	The IVR designer should facilitate nodes for sending SMS/ Email from the interface itself
XXIII	System should provide an easy GUI Tool to change the IVR prompts on the implemented IVR flow
XXIV	System should be capable to support voicemail feature wherein the callers can leave a voice message and can be called back later on the provided number at the desired time
XXV	System should be able to provide office hours integration wherein if the call is received after the office hours, the system should play the after office hours IVR Flow
XXVI	System should be able to identify notorious activities and repeated calls from same number, which may hamper the security or productivity of the business. System should also be able to blacklist such numbers and reject calls from these numbers
XXVII	The system should be capable of announcing the customer's position in the queue before getting connected to the agent.
XXVIII	The system should be capable of announcing the customer's estimated waiting time before getting connected to the agent.
XXIX	The system should have a feature which allows a customer to leave the queue at one position and re-join it on the same position or lower based on the preference received on the previously hold position.
XXX	Customer should be able to assign a call back over IVR. Solution should allow the customer to feed an alternate number if required over an IVR.
XXXI	IVR should have the functionality of assigning the call back automatically if a customer drops the call during waiting time.

XXXII	Screen popup on the agent screen should be on the basis of the data captured over IVR.
XXXIII	Proposed system should provide the feedback mechanism for the customer. Automatic transfer the call to the Feedback IVR and report would be required of the customer feedback captured over IVR.
5.3	Routing Functions
I	The proposed system should support the routing schemes of first in first service for customer
II	The proposed system should support the routing schemes of first idle first service for agent
III	The proposed system should support the routing schemes of skill based routing
IV	The proposed system should support the routing schemes of CLI based routing
V	The proposed system should support the routing schemes of channel based routing
VI	The proposed system should support the routing schemes of preferred agent routing. Based on business logic, the customer can be mapped with a preferred agent. In case the agent is not available or busy (configurable definition of busy or not available), the call gets routed as per general routing logic
VII	The proposed system should support the routing schemes of customer value based routing
VIII	The system should provide hook to be able to enquire a third-party system via web-services API or open-standard method about how the call should be routed dynamically
IX	The system should be able to route the call in preference to the same agent if available (configurable definition of available) who has interacted with the customer in past (say 4 hours)
X	Each agent should have multiple skills. And each skill has priority definition, so that the agent can serve more than one customer groups. And the supervisor shall to be able to change the agent skill on the fly in live environment
XI	Agent can be set on different ranks, so high rank agent can have the priority to answer the calls when more agents are waiting for calls.
XII	The proposed system should support segmented access rate for different customer group. The high-level customer group like HNI customer should be able to access to the system with high access rate and high priority to agent service.
XIII	The proposed system should support queue waiting overtime control and overflow control. After the call in the queue is overtime yield or overflow yield, the call should be able to be routed to other resources, such as IVR, other queue, or specific agent. Provide call back option or release the call with an announcement.

XIV	The proposed system should support multiple queues for different customer group or for different service requirements.
XV	The proposed system should support queuing priority. For the same service requirements, the calls of these one have higher class can be come into the special prior queue.
XVI	The calls should be freely transferred between agent and agent, between agent and IVR, agent and skill queue etc. and the service data should be transferred at the same time with the call.
XVII	The proposed system should support to allow change for music on hold on the fly.
XVIII	The proposed system should support to allow a recording or promotion offer to play during customer on hold
XIX	Multiple queues can be managed and routing can be based on service data from IVR to those queues
XX	Should support the functionality that presents the option to callers in the old queue to hang up without losing their place in queue, and be called back when their call reaches the top of the queue, rather than waiting on hold on defined time interval
XXI	Solution should support the functionality in case an agent leaves the desk without making himself or herself un-available in the system then customer call should be automatically routed to next available agent within a timeout and the agent status should change automatically to break by the system.
5.4	Dialer Functions
I	The proposed system should provide outgoing call functionality for customer care, marketing promotion, and reminders and so on.
II	The proposed system should allow the functionality of dialing any valid contact number visible on knowledge space just by clicking the number
III	Dialer should support preview dialing mode
IV	Dialer should support progressive dialing mode
V	Dialer should support predictive dialing mode
VI	The proposed system should be able to map multiple lead to different queues, dialer should function intelligently as per available agent in each queue
VII	The proposed system should be able to dial multiple calls to the customer simultaneously for a pre-recorded message
VIII	The system should support the outbound policy including the date, time, times of call on different conditions.
IX	The proposed system should be able to do automated surveys using questionnaire and collect feedback on customer service
X	The proposed system should support inbound and outbound blending

XI	The proposed system should support to manage special list and provides the management like add, import, delete, batch modify or batch export about special list
XII	The proposed system should support setting different calling periods for work days and holidays
XIII	The OB (outbound system) need to be integrated with the CRM/customer information to be provided to the agents
XIV	The ability to tag the customer as blacklisted should be supported in the solution
XV	Dialer should have the capability of fetching the contacts for dialing based on the defined priority and weightage of the leads
XVI	Dialer should have the capability of fetching the contacts for dialing based on the phone pattern from the leads
XVII	Dialer should have the capability of fetching the contacts for dialing in the same sequential order as mentioned in the leads
XVIII	Dialer should have the capability of fetching the contacts for dialing from the leads on the basis of defined filters. For instance, in a collection process, dialer should dial only those numbers whose due date is two days after the present date.
XIX	Dialer should have the capability of fetching the contacts for dialing from the leads on the basis of order of some field in the lead list. For instance, dialer should dial the person first with maximum balance.
XX	Dialer should dial limited number of time the callbacks on predefined date and time based on the availability of earlier handled agent. Otherwise, route it to the next available agent after specified number of tries achieved.
XXI	The dialer should have the feature to perform targeted and skill based outbound dialing
XXII	The proposed system should have the capability of studying the behavior of individual customers and then decides the best time to initiate the call. It should be intelligent enough to identify best time to call a person after multiple attempts to a number by considering all previous attempts and not only the last attempt.
XXIII	The proposed system should have functionality to control action on dialing by defining conditions on different lead list. (E.g. if the number of connects from a lead list reaches 100 then the dialer should stop dialing from that particular lead list.)
XXIV	Lead list and call-backs should be managed automatically as per configurable Time Zones
XXV	The proposed solution should have the capability to integrate with third party applications and automate the call list upload process for dialing
XXVI	System should have capability to integrate with third party applications and automate the call list upload process for dialing
5.5	Supervisor Application Functions

I	Application should provide the ability to monitor log in and log out for agents
II	Supervisor should be able to see agents' presence i.e. available agents and those who are either busy or on break
III	Supervisor should be able to snoop into a call – i.e. listen into a call
IV	Supervisor should be able to barge into a call - i.e. take over a call
V	Supervisor should be able to whisper with an agent – ability to speak with the agent without alerting the customer
VI	Supervisor should be able to do conference with agents and customer in real time
VII	Supervisor should be able to terminate a login session of agents - Force logout/login of agents
VIII	Application should provide the support to monitor agent customer interaction in real time
IX	Supervisor should be able to download recorded calls and assign scoring to the respective agents at operations level, unique for each campaign
X	Supervisor should be able to rate calls using a combination of gradient rating (Bad, Fair, Good, Excellent and such) and a YES/NO type. Capability should be there to generate reports for scoring.
XI	Application should support the capability to monitor calls queues and assignment of agents if need arises – i.e. Outbound to Inbound
XII	Supervisor should be able to manage callbacks redefining schedules
XIII	Application should provide support to supervisor to act as agents
XIV	Application should provide a dashboard to monitor productivity real time with major KPIs
XV	Solution should support the supervisor to view whether call has been disconnected at customer end or agent end
XVI	Solution should support to allow supervisor to change the auto-dialing algorithm at run-time without a restart or reset
XVII	Supervisor should be able to assign agents with leads for preview dialing
XVIII	Supervisor GUI allow him/her to manage the contact lists for dialing
XIX	System should be able to integrate and pass the vital statistics to be displayed for business productivity
XX	Supervisor should be able to assign skills to agents and queues from the provided GUI
XXI	Supervisor can map agents with queues.
XXII	Supervisor GUI should allow the queue wise SLA in live dashboard
XXIII	Supervisor should be able to see the past calls related history
XXIV	Supervisor's live dashboard must provide agent's current status including:
	a)Telephony status - if on-call
	b) User presence - if on break, on-call, idle
	c) Since what time user is on call or on break
	d) Number of breaks user has taken

	e) Number of calls user has attended
	f) Number of calls user has dialed
	g) Breakup of all user dispositions
	h) Average wrap-up time of user in past hour
	i) Average call-duration in past hour
	j) Longest call-duration in past hour
	k) Number of callbacks done by user
5.6	Multimedia Capabilities
I	The proposed solution should support the multimedia channels including SMS, Email, Web chat, Facebook/Twitter.
II	Agent can use the multimedia channels combining with other service in the desktop. When agent has ended the conversation with customer the agent can send SMS, Email to help customer remember or understand the content.
III	The proposed solution should be capable of handling the messages of customer using different channels
IV	The system should at least support the social media channels access like
V	1) Facebook
VI	2) Twitter
VII	The proposed system should have the capability to create and assign tickets on customer response on social media.
VIII	The user should be able to access responses of customers of different media like voice, chat, email, sms, Fax, Facebook/twitter on a single screen.
IX	Allows an agent to handle calls, do live chat with the customer, handle communication coming via Email and manage Facebook/twitter interactions from a single unified interface
X	Displays customer interaction history on receiving a new interaction instantaneously through various mediums such voice, email, chat, sms, Facebook/twitter.
XI	Clubs various customer interactions based on certain merging logics (Customer, Subject, Subject + Observer, Subject + Customer) to streamline interaction management.
XII	Implement intelligent routing mechanism to direct customer interactions from configured media sources to relevant agents.
XIII	Empower agents with complete history of customer interactions across mediums to provide personalized customer service
XIV	Equip agents the option of responding to customer interactions through canned responses
XV	Enables easy transfer of customer calls with the simultaneous transmission of customer context
XVI	Provide facility for Agent to add acronym such as "As soon as possible" etc.
XVII	Define SLA for Interaction based on the priority and supervisor should be notified via color threshold
XVIII	Furnish real-time graphical representation of interaction status and SLA

XIX	Allows agent to interact with customers via Facebook Messenger of organization page from the unified agent interface.
XX	The proposed solution should have a feature of Web Chat, which allows customer to contact agents by just one click.
XXI	Web chat tool should have the facility of providing canned chats.
XXII	Web chat tool should allow the uploading of file from either side of the conversation i.e. by the agent or by the customer
XXIII	After the session termination of web chat, solution should provide the feedback form to the customer for rating the interaction
5.7	Recording and Quality Functions
I	The proposed system should provide voice recording system that must record all the conversation of the agents for both inbound and outbound call.
II	System should provide 100% call recording
III	Voice logs are automatically archived and stored through an intelligent algorithm that effectively minimizes strain processing and storage of servers.
IV	Enables the system to record all the activities performed on the computer screen by the agents. It allows the monitoring and supervision of the activities performed by the agents and to analyze their performance.
V	The voice recording should be easily retrievable in desired format by the authorized personnel.
VI	Supervisor should have the option to listen, play, forward, rewind and rate the agent's recording through a single unified interface
VII	The recording should be easily searchable based on following parameters
	a. Date
	b. Time
	c. Call Duration
	d. Agent ID
	e. Caller Number
	f. Number dialed for outbound calls
	The proposed system should allow selective voice recording via API
5.8	Screen Recording
I	The proposed should have inbuilt functionality to record the activities performed on the desktop screen by the agent
II	System should allow screen recording for all or selective agents.
III	The screen recording should be easily searchable based on following parameters
	a. Date
	b. Time
	c. Call type
	d. Agent List
	e. Caller Number
	f. Number dialed for outbound calls
	g. Disposition Status

	h. Customer status
IV	The supervisor or inspector can evaluate agent performance and give the remark on the recordings
V	Proposed system should have the capability to store voice logs for a long duration, as 5 years.
VI	The system should be able to search existing recordings based on business critical keywords. For e.g. "bad" keyword can act as filter for the existing recordings and will give the result containing bad as keyword
VII	Recording Interface or GUI is to be common and should not be a different interface for administrator/ supervisor/ agent
5.9	Reports
I	The report template should be customizable
II	Report to be able to give the number of breaks an agent has taken
III	Report to be set on different KPI parameters like call answered time, agent utilization report, wrap up time, average call handling time etc.
IV	Report should be able to provide the SLA based reporting
V	The report can be released according the predefined time and send in the way of FTP, Email, web to the authorized personnel.
VI	The proposed solution should support Release party report, i.e report stating hung-up details for each call
VII	Queue drop calls report with MSISDN and time stamp
VIII	Proposed system should allow users to gather reports from remote location
IX	The report should have details about missed calls also
X	Proposed solution should provide a report designer tool where reports can be designed by the user on the available data
XI	System should be able to send the email of some reports to defined mail ID
XII	Some reports should comprise of graphical charts exhibiting the statistics
XIII	Automatic archiving of Reports on separate server for backup of the historical data.
5.10	Security and Encryption
I	Vendor must be PCI DSS certified company in order to guarantee security
II	Contact Centre solution should be robust and modular in nature, which allows high flexibility in the system design leading to easiness in achieving add-on modules. Proposed system should provide encrypted data exchange between client machines and Server to ensure higher level of security. All modules including the Application server, management server, reporting server must be configured to be accessed via only Secure Socket Layer (SSL) which uses RSA encryption and Public Key Infrastructure (PKI).
III	System should provide high availability, load balancing and redundancy in the application to ensure the business continuity.
IV	Proposed should be recoverable in case of disaster recovery, where DR site should be separate independent location.

GENERAL EXPERIENCE RECORD

Name of Applicant

All applying firms to complete the information in this form. The information supplied should be on the jobs undertaken by the applicant.

Principal Clients		
Client	No. of Assignments	Nature of Assignments generally

Clients Information

Name of Applicant

Use a separate sheet for each contract.

1.	Name of Client
2.	Client address
3.	Nature of services –
4.	Assignment role (check one) <input type="checkbox"/> Sole PR Consultancy Partnering Agency
5.	Value of the contract and professional fees charged <input style="width: 50px;" type="text"/>
6.	Date of engagement
7.	Date of completion of the services

key employees' summary

Applicants should provide the names of at least **two candidates** qualified to meet the specified requirements stated for each position and provide the data on their experience in separate sheets for each candidate.

Name of applicant

Summarize professional experience for key employees in reverse chronological order. Indicate particular technical and material experience.

No. of Years' experience	Company Position	Relevant and Management experience

Financial capability

Name of applicant

Applicants should provide financial information to demonstrate that they meet the requirements stated in the Instructions to Applicants. Each applicant must fill in this form. If necessary, use separate sheets to provide complete banker information.

Attach copies of Audited accounts for the last 2 years.

Banker	Name of banker	
	Address of banker	
	Telephone 1. 2. 3.	Contact name and title
	Email address	

Summarize actual assets and liabilities in Kenya Shillings equivalent for the previous two years. Based upon known commitments, summarize projected assets and liabilities in Kenya Shillings equivalent for the next two years.

Financial information in Kshs. equivalent	Actual: Previous two years		Projected: Next two years	
	1.	2.	3.	4.
1. Total assets				
2. Current assets				
3. Total liabilities				
4. Current liabilities				

Litigation History

Name of applicant

Applicants should provide information on any history of litigation or arbitration or pending complaints resulting from the professional practice resulting from services done in the last five years or currently under execution

Year	Award FOR or AGAINST Applicant	Name of client, cause of litigation, and matter in dispute	Disputed amount (current value Kshs. equivalent)

REFERENCES

Ukulima Sacco and its authorized representatives may contact the following persons for further information:

<i>General and managerial inquiries</i>	
Contact 1	Telephone 1
Contact 2	Telephone 2
<i>Personnel inquiries</i>	
Contact 1	Telephone 1
Contact 2	Telephone 2
<i>Technical inquiries</i>	
Contact 1	Telephone 1
Contact 2	Telephone 2
<i>Financial inquiries</i>	
Contact 1	Telephone 1
Contact 2	Telephone 2

SECTION VII STANDARD FORMS

1. Technical Proposal Submission form
2. Financial Proposal Submission form
3. Declaration Form
4. Confidential Questionnaire form
5. Bid security form
6. Performance security form
7. Contract form

TECHNICAL PROPOSAL SUBMISSION FORM

[_____Date]

To: *Ukulima Sacco*
P. O BOX 44071- 00100
NAIROBI

Ladies/Gentlemen:

We, the undersigned, offer to provide the services for supply, implementation, testing, commissioning of a contact center system/ solution in accordance with your Bid dated _____[Date] and our Proposal. We are hereby submitting our Bid, which includes this Technical Proposal, [and a Financial Proposal sealed under a separate envelope].

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:]

FINANCIAL PROPOSAL SUBMISSION FORM

_____ [Date]

To: Ukulima Sacco
P. O. BOX 44071-00100
Nairobi

Ladies/Gentlemen:

We, the undersigned, offer to provide the consulting services for supply, implementation, testing, commissioning of a contact center system/ solution in accordance with your Bid 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]

DECLARATION FORM

Date _____

Bid No.

Bid Name

To: Chief Executive
Officer Ukulima Sacco,
Ukulima Co-operative
House,
P.O. Box 44071-00100,
Nairobi, Kenya.

Ladies and Gentlemen,

The Bidder i.e. (full name and complete physical and postal address)
Declare the following: -

- a) That I/ We have not been debarred from participating in public procurement by anybody, institution or person.
- b) That I/ We have not been involved in and will not be involved in corrupt and fraudulent practices regarding public procurement anywhere.
- c) That I/We or any director of the firm or company is not a person within the meaning of paragraph 2.1.2 of ITT (Eligible Bidders) of the Instruction to Bidders.
- d) That I/ We are not insolvent, in receivership, bankrupt or in the process of being wound up and is not the subject of legal proceedings relating to the foregoing.
- e) That I/ We are not associated with any other Bidder participating in this Bid.
- f) That I/We do hereby confirm that all the information given in this Bid is accurate, factual and true to the best of our knowledge.

Yours sincerely,

Name of Bidder

Signature of duly authorized person signing the Bid

Name and Capacity of duly authorized person signing the Bid

Stamp or Seal of Bidder

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 applied to your type of business.

You are advised that it is a serious offence to give false information on this form.

	<p>Part 1 General</p> <p>Business Name.....</p> <p>Location of Business Premises.....Plot No, Street/Road.....Postal addressTel No Fax Email..... Nature of Business</p> <p>Registration Certificate No.</p> <p>Maximum value of business which you can handle at any one time – Kshs.....</p> <p>Name of your bankers..... Branch</p>																									
	<p>Part 2 (a) – Sole Proprietor</p> <p>Your name in full..... Age.....</p> <p>Nationality.....Country of Origin.....</p> <p>Citizenship details</p>																									
	<p>Part 2 (b) – Partnership</p> <p>Given details of partners as follows</p> <table style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 10%;"></th> <th style="width: 30%;">Name</th> <th style="width: 30%;">Nationality</th> <th style="width: 20%;">Citizenship Details</th> <th style="width: 10%;">Shares</th> </tr> </thead> <tbody> <tr> <td>1.</td> <td>.....</td> <td>.....</td> <td>.....</td> <td>.....</td> </tr> <tr> <td>2.</td> <td>.....</td> <td>.....</td> <td>.....</td> <td>.....</td> </tr> <tr> <td>3.</td> <td>.....</td> <td>.....</td> <td>.....</td> <td>.....</td> </tr> <tr> <td>4.</td> <td>.....</td> <td>.....</td> <td>.....</td> <td>.....</td> </tr> </tbody> </table>		Name	Nationality	Citizenship Details	Shares	1.	2.	3.	4.
	Name	Nationality	Citizenship Details	Shares																						
1.																						
2.																						
3.																						
4.																						

Part 2 (c) – Registered Company

Private or Public

State the nominal and issued capital of company
Nominal Kshs.

Issued Kshs.

Given details of all directors as follows

Name	Nationality	Citizenship Details	Shares
1.			
2.			
3.			
4.			

Date.....Signature of Candidate.....

BID SECURITY FORM

Whereas [name of the Bidder]
(hereinafter called "the Bidder") has submitted its Bid dated.....
[date of submission of Bid] for the provision
of

.....
[name and/or description of the services]

(hereinafter called "the Bidder")KNOW ALL
PEOPLE by these presents that WE.....

Of.....having registered office at
[name of procuring entity] (hereinafter called "the Bank") are bound unto.....
[name of procuring entity] (hereinafter called "Ukulima Sacco") in the sum of

for which payment well and truly to be made to the said Ukulima Sacco, the Bank binds itself, its successors, and assigns by these presents. Sealed with the Common Seal of the said Bank this_____ day of 20__.

THE CONDITIONS of this obligation are:

1. If the Bidder withdraws its Bid during the period of Bid validity specified by the Bidder on the Bid Form; or
2. If the Bidder, having been notified of the acceptance of its Bid by the Procuring entity during the period of Bid validity:
 - (a) fails or refuses to execute the Contract Form, if required; or
 - (b) fails or refuses to furnish the performance security, in accordance with the instructions to Bidders;

we undertake to pay to Ukulima Sacco up to the above amount upon receipt of its first written demand, without Ukulima Sacco having to substantiate its demand, provided that in its demand Ukulima Sacco will note that the amount claimed by it is due to it, owing to the occurrence of one or both of the two conditions, specifying the occurred condition or conditions. This guarantee will remain in force up to and including thirty (30) days after the period of Bid validity, and any demand in respect thereof should reach the Bank not later than the above date.

[signature of the bank]

PERFORMANCE SECURITY FORM

To [Ukulima

Sacco]

WHEREAS [name of Bidder]

(hereinafter called "the Bidder") has undertaken, in pursuance of Contract No. ____ [reference number of the contract] dated _____
_____20_____to

supply.....
[Description services] (Hereinafter called "the contract")

AND WHEREAS it has been stipulated by you in the said Contract that the Bidder shall furnish you with a bank guarantee by a reputable bank for the sum specified therein as security for compliance with the Bidder's performance obligations in accordance with the Contract.

AND WHEREAS we have agreed to give the Bidder a guarantee:

THEREFORE, WE hereby affirm that we are Guarantors and responsible to you, on behalf of the Bidder, up to a total of
[amount of the guarantee in words and figures], and we undertake to pay you, upon your first written demand declaring the Bidder to be in default under the Contract and without cavil or argument, any sum or sums within the limits of *[amount of guarantee]*

as aforesaid, without your needing to prove or to show grounds or reasons for your demand or the sum specified therein.

This guarantee is valid until the day of 20

Signature and seal of the Guarantors

[name of bank or financial institution]

[address]

[date]

CONTRACT FORM

THIS AGREEMENT made the __ day of ____ 20__ between [Ukulima Sacco] of [Kenya] (hereinafter called "Ukulima Sacco") of the one part and

..... [name of tended red] of.. [city and country of Bidder] (hereinafter called

"the Bidder") of the other part.

WHEREAS Ukulima Sacco invited Bids for certain Materials and spares. VI [brief description of materials and spares] and has accepted a Bid by the

Bidder for the supply of those materials and spares in the sum of [Contract price in words and figures]

NOW THIS AGREEMENT WITNESSETH AS FOLLOWS:

1. In this Agreement words and expressions shall have the same meanings as are respectively assigned to them in the Conditions of Contract referred to.
2. The following documents shall be deemed to form and be read and construed as part of this Agreement, viz.:
 - (a) the Bid Form and the Price Schedule submitted by the Bidder;
 - (b) the Schedule of Requirements;
 - (c) the Technical Specifications;
 - (d) the General Conditions of Contract;
 - (e) the Special Conditions of Contract; and
 - (f) Ukulima Sacco's Notification of Award.
3. In consideration of the payments to be made by Ukulima Sacco to the Bidder as hereinafter mentioned, the Bidder hereby covenants with Ukulima Sacco to provide the materials and spares and to remedy defects therein in conformity in all respects with the provisions of the Contract
4. Ukulima Sacco hereby covenants to pay the Bidder in consideration of the provision of the materials and spares and the remedying of defects therein, the Contract Price or such other sum as may become payable under the provisions of the contract at the times and in the manner prescribed by the contract.

IN WITNESS whereof the parties hereto have caused this Agreement to be executed in accordance with their respective laws the day and year first above written.

Signed, sealed, delivered by _____ the _____ (for Ukulima
Sacco) Signed, sealed, delivered by _____ the _____ (for
the Bidder)

In the presence of _____.

