



REQUEST FOR PROPOSAL

**REQUEST FOR PROPOSAL – PROVISION OF CONSULTANCY
SERVICES FOR ASSESSMENT OF PERFORMANCE,
EFFICIENCY AND COMPLIANCE OF MEP SYSTEMS –
BRITAM CENTER AND BRITAM TOWER**

RFP-2024-002-004

RELEASE DATE: 15th April 2024

CLOSING DATE: 26th April 2024

EXPRESSION OF INTENT TO PARTICIPATE IN TENDER

This form is to be completed on receipt of the tender document from Britam Holdings Plc.

This page is to be completed immediately and scan copy in PDF format e-mailed to Procurement tenders@britam.com. The data contained in this form will be used to send out any addenda that may arise. Firms that do not register their interest by completing this form may not be sent addenda that may arise.

Name of the firm’s representative completing this form:

Firm’s Name: _____

Address: _____

Tel No: _____

Email Address: _____

Signature: _____ Date: _____

Signed by (Name): _____

Position in Firm: _____

1 INTRODUCTION

1.0 Purpose of the Tender

The Britam Holdings Plc ("Britam") invites qualified firms to submit their quotations for exterior façade and window cleaning maintenance services.

This Request for Proposal (RFP) is being made available to interested service providers on an open tender basis. This document is intended to provide vendors with sufficient understanding of the Britam's requirements to enable them to respond.

For the purposes of the RFP, it is necessary to disclose information in this document, and its schedules, which is considered confidential and should therefore not be used (otherwise other than in furtherance of this tender) or disclosed to any third party without explicit prior written consent of Britam.

Britam on its part also acknowledges that it is requesting through this RFP for information that is confidential and therefore commits in equal terms to reciprocal confidentiality.

1.1 Acknowledgement of Bidding Documents

Britam invites proposals for Provision of Consultancy Services for Assessment of Performance, Efficiency and Compliance on MEP Services in accordance with the requirements set out in this document. Within three (3) working days of receipt of the RFP, the Bidder is required to acknowledge receipt of the RFP and notify his intention to submit a bid by email to Britam at tenders@britam.com. The mail will include the signed registration template on Page 4 of this document.

Working days are defined as being any day of the week between Monday and Friday (0800 – 1700 Hrs) excluding weekends and gazetted public holidays in the Republic of Kenya).

Failure to do so shall be perceived as an intention not to submit a bid and the Bidder will be eliminated from the bid process and required to destroy the RFP document in keeping with confidentiality requirements.

1.2 Point of Contact

All enquiries or correspondence concerning the details of this tender should be addressed, in the first instance by e-mail to: **tenders@britam.com** and **admin@srmhub.com**. The subject on the email should be **"CLARIFICATION ON THE PFP FOR CONCLTANCY**

SERVICES FOR ASSESSMENT OF PERFORMANCE, EFFICIENCY AND COMPLIANCE OF MEP SYSTEMS – BRITAM CENTER AND BRITAM TOWER”.

- All responses from Britam to the Bidder shall be channeled through the Procurement Officer.
- Mandatory site visit will be on Wednesday 17th April at 2pm – Britam Tower.
- It is the responsibility of the Bidder to obtain any further information required to complete this RFP.
- Any clarification request and their associated response will be circulated to all Bidders.
- All clarifications must be received on Friday, 19th April 2024.
- Response to clarification will be shared on 23rd April 2024.

2 ABOUT BRITAM HOLDINGS PLC**2.0 Organization Profile**

Britam Holdings PLC (“Britam”) is a leading diversified financial services group, listed on the Nairobi Securities Exchange. The group has interests across the Eastern and Southern Africa region, with operations in Kenya, Uganda, Tanzania, Rwanda, South Sudan, Mozambique, and Malawi. The group offers a wide range of financial products and services in Insurance, Asset management, Banking and Property. For more information, please visit <http://www.britam.com>.

The Group offers a wide range of products and services to individuals, small businesses, corporations, and government entities. The range of products includes life insurance, pensions, health insurance, and general insurance through its insurance businesses in the region. The financial solutions which include, unit trusts, investment planning, wealth management, offshore investments, retirement planning and discretionary portfolio management which are offered through its asset management business. In addition, the company carries out property development, and has substantial investments in the banking sector. For More information, please visit <http://www.britam.com>

2.1 Britam Vision

To be the LEADING diversified financial services company in our chosen markets across Africa.

2.2 Britam Mission

Providing you with financial security EVERY STEP OF THE WAY.

3 OVERVIEW OF THE PROPOSAL

3.0 Overview

Britam is soliciting proposals for MEP systems audit services. Britam is desirous of engaging a consultant for assessment of performance, efficiency and compliance of MEP systems – Britam center and Britam tower.

This RFP aims at identifying a suitable supplier to provide services as outlined in the RFP scope.

3.1 Objective of the RFP

The selected vendor will be required to.

- a) Provision of consultancy for assessment of performance, efficiency and compliance of MEP systems – Britam center and Britam tower.

3.2 Scopes of Work

The Contractor shall provide all necessary engineering and technical personnel, supervision, and equipment to efficiently accomplish the required service.

<p>Item/Service Description:</p> <p>The purpose is to assess the performance, efficiency and compliance of MEP systems with relevant standards and regulations.</p> <p>Objective:</p> <ul style="list-style-type: none"> • To evaluate the operational efficiency and performance of MEP systems to identify opportunities for energy savings and cost reduction. • To ensure compliance with building codes, regulatory requirements and industry standards related to MEP services. • To identify potential maintenance issues, safety hazards or system deficiencies that may impact occupant comfort and building operations.
<p>Scope of MEP Audit</p> <p>HVAC Systems: Assessment of HVC equipment, including efficiency ratings, airflow measurements and temperature controls.</p> <p>Electrical Systems: Evaluation of power distribution, lighting and emergency back up systems for compliance with electrical codes and safety standards.</p>

Plumbing Systems: Inspection of water supply, drainage and fire protection systems for leaks, pressure issues and code compliance.

Technical Requirements:

- MEP Expertise – Consultants must have specialized knowledge and experience in assessing MEP systems, including familiarity with relevant codes and standards.
- Audit Tools – The consultants must be able to utilize appropriate measurement instruments, software, and diagnostic equipment for conduction MEP assessments.
- Generation of comprehensive audit report detailing findings, recommendations, and corrective actions for each MEP system.

Audit Methodology

- Define the approach and methodology for conducting the MEP audits, including site inspections, data collection, testing procedures and analysis techniques.
- Establish criteria for evaluating MEP system performance such as energy consumption, indoor air quality, equipment condition and regulatory compliance.

Quality Assurance and Reporting

Implement quality control measures to ensure accuracy, reliability and consistency in audit findings and recommendations.

Provide detailed audit reports with clear documentation of observations, analysis, results and recommendations for improvement.

Benefits/Justification:

1. Identifying root causes to pinpoint underlying issues causing system failures.
2. Improving systems performance
3. Cost savings

- 4. Enhancing occupant comfort and safety
- 5. Risk Mitigation
- 6. Optimizing maintenance practices
- 7. Facilitating decision making
- 8. Building resilience

3.3 EVALUATION CRITERIA

STAGES OF EVALUATION:

- A) Mandatory requirements will determine the satisfactory responsiveness of a tenderer, failure to meet any of these set requirements as noted hereunder will render a tender nonresponsive and will automatically be disqualified.
- B) Technical Evaluation: Only bidders who will attain an overall score of 70marks and above in the technical evaluation will have their financial proposals evaluated.
- C) Financial Evaluation Stage award criteria: The lowest evaluated tender for the complete schedule will be recommended for award.

i. PRELIMINARY EVALUATION CRITERIA

	CRITERIA	COMPLIANCE
1	Attach a Copy of Certificate of Registration / Incorporation	Mandatory
2	Attach System Generated Copy of CR12 Certificate (for Incorporated Firms) issued within the last 3 months.	Mandatory
3	Copy of a Valid KRA Tax Compliance Certificate	Mandatory
4	Must provide a valid occupational safety and health certificate - DOSH	Mandatory
5	Must submit Relevant Practising licences for 3 lead engineers	Mandatory
6	Current County Government Business License from the region they are offering services, clearly indicating location of Registered Office.	Mandatory

8	Bidders to provide proof of insurance cover including Indemnity against risk & Workman Injuries Benefit Cover (WIBA)	Mandatory
9	Bidders Must fill, sign and stamp the price schedule	Mandatory
10	Must provide a Contact address: Physical, Postal, Telephone and Email address of the Firm and clearly indicate the list of Directors or Partners as applicable by in the Confidential Business Questionnaire which should be filled, stamped and signed	Mandatory
11	Site visit Certificate- Attach a Filled and Signed tender site viewing certificate by a designated officer at Britam Tower Office (site visit scheduled on 17 th April 2024 – 2Pm)	Mandatory
Any tender not meeting the mandatory and other eligibility criteria will not proceed to the Technical Evaluation Stage.		

3.3.1 Technical Evaluation Criteria

TECHNICAL EVALUATION REQUIREMENTS			
No	CRITERIA DESCRIPTION	WEIGHT	SCORE
1	<p>Firm's experience: Provide five POs/Contracts from corporate clients to score marks 3 marks for each letter in the last 5 years</p> <p>The firm should provide five (5) recommendation letters (Matching to PO/contracts above) where they have undertaken Mechanical/ plumbing/electrical maintenance services within the last 5 years. – 10 Marks</p>	25	

2	<p>Staff capacity: CV and certificates of atleast 3 Engineers with relevant training (Minimum qualifications - Degree Certificate) who will be in charge of the contract implementation if awarded the contract. (9 points) List of at least four 5 Technical Staff (attach CV and Copies of Certificates for both categories of employees) (15 points) Upload certificates as evidence of the above.</p>	24	
3	<p>Methodology: Attach work plan of contract execution if awarded (Deployment of staff, Scheduling, work plan)</p>	15	
4	<p>Fully Equipped Workshop: Provide details of tools to be used – Proof of ownership (10 points) Possession of equipped workshop (attach a photo of the workshop) – (10 points) Information under this item will be confirmed during due diligence</p>	10	
5	<p>Valid practising Licence for the firm – PASS OR FAIL Valid practicing license/certificate for the 3 lead engineers provided in No.2 – PASS OR FAIL (EBK and IEK for engineers, BORAQS for Architects &Quantity Surveyors among others.)</p>	PASS OR FAIL	
6	<p>Audited Financial Reports 2021,2022 with iTax annual returns (5 marks)</p>	6	
7	<p>Compliance with scope of work</p>	10	
	<p>TOTAL MARKS</p>	100	
	<p>PASS MARK</p>	70	

Technical – (Scores - 70%)

References - Please provide in the table below details of at least Five (5) projects you have undertaken relevant to the job you are bidding for and performed over the last three (3) years.

Provide copies of **Letter of award, LPO, Contract and recommendation Letters.**

No	Customer Organization (name)	Customer contact name and phone number	Contract reference and brief description:	Date contract awarded.	Value of businesses transacted: (Kshs)
1					
2					
3					
4					
5					

Only bidders who score 70 marks and above will be subjected to Financial Evaluation. Those who score below 70 marks will be eliminated at this stage from the entire evaluation process and will not be considered further.

Financial – (Scores - 30%)

Provide a competitive financial proposal detailing the project costs (please include applicable taxes).

Britam will pay the Contractor a fixed price upon satisfactory completion of monthly landscaping services.

The Contractor shall include the cost of all equipment, materials, labour (including any premium pay for services required for overtime and holidays), overhead, taxes and profit in the fixed price for landscaping services.

3.4 PRICE SCHEDULE

Item	Description	Frequency	Cost Per Month	Cost Per Annum
1	Provision of MEP systems consultancy – Britam Center	One off		
2	Provision of MEP systems consultancy – Britam Tower	One off		
	VAT 16%			
Total				

4 FORMAT OF RESPONSE TO TENDER

4.0 Information to be provided by bidders.

All bids should contain ALL INFORMATION REQUESTED IN SECTIONS 4.1 TO 4.5. The information should be in the following order.

4.1 General Information about the firm

Provide the following documentation in respect of your company.

- (i) Certificate of registration (or its equivalent) that is valid in accordance with any legally recognised jurisdiction.
- (ii) Tax compliance certificate (or its equivalent) that is valid in accordance with any legally recognised jurisdiction.
- (iii) Current County Trade license/Business permit
- (iv) Accreditations or a licence where applicable
- (v) Company Profile, with a clear organogram and area of speciality
- (vi) List of Directors (Name, ID Number/passport number, Nationality, Telephone and physical address
- (vii) Britam Non-Disclosure Agreement (document to be provided to accompany this RFQ)
- (viii) Britam Supplier Code of Conduct (document to be provided to accompany this RFQ)
- (ix) Britam Business Litigation and Probity; and Lead Time and Credit Period Declaration Form (document to be provided to accompany this RFQ).

4.2 Bid Preparation and Submission

The application and submission will be conducted electronically on SRM eProcurement Portal i.e. www.srmhub.com. Please follow the following steps to complete your application;

1. **Join SRM** for free via URL www.srmhub.com
2. **Create a user account** or **log in** with existing credentials
3. Under **APPLY TENDER** tab, express interest to review details of the tender
4. Click **EXPRESS INTEREST** to begin application:
 - i. Select your Category
 - ii. Respond to **QUESTIONNAIRE**
 - iii. **UPLOAD** requisite documents
 - iv. Pay the tender fees payment
 - v. **SUBMIT** response

Access to submit the application shall be automatically granted upon payment of a non-refundable tender fee of KES 1,000/- per Tender category. The fee is payable using M-PESA Paybill No. 4095233, Use Account Number auto generated in system to validate your payment.

5 GENERAL CONDITIONS OF CONTRACT

5.1 Introduction

Specific terms of contract shall be discussed with the bidder whose proposal will be accepted by the Company. The resulting contract shall include but not be limited to the general terms of contract as stated below from 5.2 to 5.14.

5.2 Award of Contract

Following the opening and evaluation of proposals, the Company will award the Contract to the successful bidder whose bid has been determined to be substantially responsive and has been determined as the best evaluated bid. Britam will communicate to the selected bidder its intention to finalize the draft conditions engagement in consultation with the bidder.

5.3 Application of General Conditions of Contract

These General Conditions (sections 5.2 to 5.14) shall apply to the extent that they are not superseded by provisions in other parts of the Contract that shall be signed.

5.4 Bid Validity Period

Bidders are requested to hold their proposals valid for ninety (90) days from the closing date for the submission.

5.5 Non-variation of Costs

The prices quoted for the service and subsequently agreed and into the contract shall be held fixed for the contract period.

5.6 Delays in the Bidder's Performance

- 3.1.1. Delivery and performance of the Transaction shall be made by the successful Bidder in accordance with the time schedule as per Agreement.
- 3.1.2. If at any time during the performance of the Contract, the Bidder should encounter conditions impeding timely delivery and performance of the Services, the Bidder shall promptly notify the Company in writing of the fact of the delay, its likely duration, and its cause(s). As soon as practicable after receipt of the Bidder's notice, the Company shall evaluate the situation and may at its discretion extend the Bidder's time for performance, with or without liquidated damages, in which case the extension shall be ratified by the parties by amendment of the Contract.
- 3.1.3. Except in the case of "force majeure" as provided in Clause 5.14, a delay by the Bidder in the performance of its delivery obligations shall render the Bidder liable to the imposition of liquidated damages pursuant to Clause 5.7.

3.2. Liquidated damages for delay

The contract resulting out of this RFP shall incorporate suitable provisions for the payment of liquidated damages by the bidders in case of delays in performance of contract.

3.3. 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 also be in English language.

3.4. Applicable Law

This agreement arising out of this RFP shall be governed by and construed in accordance with the laws of Kenya and the parties submit to the exclusive jurisdiction of the Kenyan Courts.

3.5. Successful Bidder's Obligations

The successful bidder:

- 3.5.1. Is obliged to work closely with Britam staff, act within its own authority, and abide by directives issued by the Company that are consistent with the terms of the Contract.
- 3.5.2. Will abide by the job safety measures and will indemnify the Company from all demands or responsibilities arising from accidents or loss of life, the cause of which is the Bidder's negligence. The Bidder will pay all indemnities arising from such incidents and will not hold the Company responsible or obligated.
- 3.5.3. Will be responsible for managing the activities of its personnel, or subcontracted personnel, and will hold itself responsible for any misdemeanors.
- 3.5.4. Will not disclose the Company's information it has access to, during the course of the work, to any other third parties without the prior written authorization of the Company. This clause shall survive the expiry or earlier termination of the contract.

**SITE VISIT CLEARANCE CERTIFICATE
BRITAM
RFP – CONSULTANCY ON MEP SYSTEMS
TENDER NO. RFP-2024-002-003**

This is to certify that M/s. _____ have visited, inspected and Verified the scope of works.

NO.	STATION	NAME OF BRITAM REPRESENTATIVE	SIGN	DATE OF VISIT
1.	Britam Towers			
2.	Britam Centre			

Tenderers Representative

NO.	STATION	NAME OF BRITAM REPRESENTATIVE	SIGN	DATE OF VISIT
1.	Britam Towers			
2.	Britam Centre			

6 BRITAM SUPPLIER CODE OF CONDUCT

6.1 GENERAL

This Code is applicable to all Britam suppliers (hereinafter "Supplier" or "Suppliers") and their employees (be they temporary, casual, or permanent) and sub-contractors throughout the world. Britam requires all Suppliers to conduct their business dealings with Britam in compliance with this Code and in compliance with all laws applicable to the Supplier's' business, wherever conducted. By entering business transactions with Britam, the Supplier agrees to abide by the terms of this Code and acknowledge that compliance with this Code is required to maintain the Supplier's status as a Britam Supplier. Britam shall have the right to terminate any Supplier's contract for failure to comply with the provisions of this Code. Britam recognizes that local laws may in some instances be less restrictive than the provisions of this Code. In such instances Suppliers are expected to comply with the Code. If local laws are more restrictive than the Code, then Suppliers are expected to comply with applicable local laws.

6.2 PROVISIONS

In particular, Suppliers must comply with the following:

6.2.1 Relations with competitors

Suppliers will be required to comply with applicable antitrust or competition laws and will not engage in any restrictive trade practices. Suppliers will at all times act in a manner that will uphold and encourage healthy competition.

6.2.2 Bribes, Conflicts of Interest, Gifts and other Courtesies

6.2.2.1 Bribes

Suppliers shall not make or offer bribes or payments of money or anything of value to any Britam employee or any other person including officials, employees, or representatives of any government or public or international organisation, or to any other third party for the purpose of obtaining or retaining business with Britam. For the avoidance of doubt Britam considers an act of bribery to include the giving of money or anything of value to anyone where there is belief that it will be passed on to a government official or Britam employee for this purpose. Suppliers are required to comply with all applicable local anti-bribery laws.

6.2.2.2 Gifts and other business courtesies

Suppliers shall ensure that any expenditure incurred in relation to any particular Britam employee or government official is in the ordinary and

proper course of business and cannot reasonably be construed as a bribe or so as to secure unfair preferential treatment. A general guideline for evaluating whether a business courtesy is appropriate is whether public disclosure would be embarrassing to the Supplier or Britam.

Britam employees may accept unsolicited gifts from Suppliers provided:

- they are items of nominal value – Kes1500 or less, or
- they are advertising or promotional materials having wide distribution e.g., calendars, stationaries, diaries, etc.; and
- Acceptance of the gift does not violate any applicable law.

6.2.2.3 Conflicts of Interest

No supplier shall enter into a financial or any other relationship with a Britam employee that creates a conflict of interest for Britam. A conflict of interest arises when the material personal interests of the Britam employee are inconsistent with the responsibilities of his/her position with the company. All such conflicts must be disclosed and approval to the transaction given.

6.2.3 Compliance and implementation

6.2.3.1 Licenses and Returns

The Supplier will be required to obtain and renew, in accordance with any law or regulations all permits, licenses and authorizations required for it to carry out its business. In addition, the Supplier will be required to prepare and file any returns that it may be required to file under its incorporation statute, the Companies Act.

6.2.3.2 Taxation, Financial Integrity, and Retention of Records

- The Supplier will comply with all revenue laws and will not evade tax.
- Suppliers will be required to maintain accurate and reliable financial and business records and shall not have any false or inaccurate accounting books or records related to Britam for any reason. Suppliers shall maintain all business records at the minimum in compliance with the provisions outlined by the Kenya Revenue Authority or local revenue authorities from time to time.

- When any government investigation or audit is pending or ongoing then Suppliers will not destroy any relevant records until the matter has been investigated and closed.

6.2.4 Violations

If a Supplier becomes aware of any known or suspected improper behaviour by another Supplier in relation to their dealings with Britam or if a bribe or other inducement is requested from a Supplier by any Britam employee or any other person with the promise of influencing Britam's position as far as that Supplier is concerned or if the Supplier feels that a conflict of interests exists with one of Britam's employees then all pertinent details should be reported in confidence to the following Contact Address

Procurement procurement@britam.com

6.2.5 Variations

Britam reserves the right to vary this Code at any time.