



SUPPLIER PREQUALIFICATION GUIDE AND INSTRUCTIONS

Closing on 28th October 2024, at 1700hours, EAT

SECTION I - REGISTRATION OF SUPPLIERS FOR GOODS AND SERVICES

Chai Sacco has been empowering members economically, socially, and financially since 1973 through the provision of financial services tailored to meet the needs of all members. The Sacco has continued to embrace the use of technology for efficient service delivery. The Society is ISO 9001:2015 Certified. The Sacco is regulated by Sacco Society Regulatory Authority (SASRA).

Chai Sacco invites applications from interested, competent and eligible firms for pre-qualification for the under listed goods, works and services for the period 2024-2026.

The pre-qualification process will therefore be conducted electronically on **SRM eProcurement Portal** i.e www.srmhub.com. The categories for the supply of various goods and services are listed on <https://shorturl.at/vT49D>

Chai Sacco reserves the right to accept or reject any application in whole or in part, and is not bound to give reasons for its decision.

Canvassing will lead to automatic disqualification.

Head of Procurement

SECTION II – INSTRUCTIONS TO APPLICANTS

- 1 **Chai Sacco** herein referred to as “the organization’ or ‘Chai Sacco”, invites applicants who meet the criteria set out by the organization to apply for registration of pre-qualification.
- 2 This invitation of application for Pre-qualification is open to potential applicants who are able to demonstrate proven technical, financial and managerial capacity to supply the listed goods and services.
- 3 The Supplier registration process shall be completed online via Bold Insights eProcurement portal (SRM eProcurement)
- 4 Interested bidders will access and register on www.srmhub.com for more information and step by step application process available on supplier’s dashboard.
- 5 There is a non- refundable access fee of **KES 2,000.00 per category** payable via **M-pesa Paybill No. 4095233, Account No. “Auto-generated at the payment stage”**
- 6 The registration process shall involve completion of a mandatory electronic questionnaire and upload of requisite documents. A vendor guide, supplier manual and necessary documents shall be available for guide on supplier’s dashboard. You are advised to download and review these documents before beginning the application process.
- 7 Bidders may request clarification in relation to the prequalification by submitting a written request using the **Contact us** functionality of the supplier dashboard, until 28th October 2024. Explanations or interpretations provided by personnel other than through this means will not be considered binding or official.
- 8 Please note that this notice does not constitute an invitation to bid for goods and services indicated but it is meant to enable preparation of a list of suppliers and service providers from whom goods and services may be procured when need arises.
- 9 The successful applicants will be registered in the organization’s suppliers list for a two-year period and the organization will only deal with the firms that are registered.
- 10 Applicants must submit duly completed and Confidential Business Questionnaire and all other mandatory requirements in electronic form.
- 11 The Organization reserves the right to request for submission of additional information from applicants or any other credible source, and to visit and inspect the business premises of the applicant to verify the information given.
- 12 The organization will ensure that information received from Companies is treated with utmost confidentiality and shall be for the sole use of the organization
- 13 The pre-qualified suppliers are required to immediately advise the organization of any significant change in its financial, technical capacity, ownership or holdings it may have.
- 14 Failure to submit any of the mandatory requirements indicated under special conditions will lead to automatic disqualification.
- 15 **The application of this call closes on 28th October 2024 at 1700hours.**
- 16 SRM will examine the documents to determine completeness, general orderliness and sufficiency of response. Failure to complete electronic questionnaire and/or to provide

answers to any further questions or requested additional information for clarification may result in the supplier's disqualification.

SECTION III. EVALUATION CRITERIA

1 Bold Insight will examine the applications to determine completeness, general orderliness and sufficiency in responsiveness.

2 Applicants shall not contact Chai Sacco or Bold Insight on matters relating to their application from the time of opening to the time the evaluation is finalized and official communication sent to them. Any effort by the applicant to influence the Chai Sacco or Bold Insight in the evaluation may result in the cancellation of their application.

3 Registration will be based on meeting the criteria regarding the applicant's legal status, general and particular experience, personnel and financial position as demonstrated by their responses.

4 The applicants must have registered offices and Chai Sacco reserves the discretion of visiting physical premises from which the applicant conducts business if so desired to confirm existence and capability to deliver the said goods, works or services.

5 Applicants who qualify according to the selection criteria will be invited to submit their quotations or bids for the supply of goods, works or services as and when required.

6 Chai Sacco reserves the right to accept or reject any or all applications.

7 There shall be two phases of carrying out the evaluation of registration applications:

- a. Preliminary Evaluation; and
- b. Qualification Evaluation.

a. Preliminary Evaluation

Preliminary Examination is to assess the document formality required in the Prequalification, for each applicant with pass-or-fail criteria on categories that have special conditions. It is necessary to confirm whether the submitted documents and their format are in conformity with the requirement.

a) All the applications shall be sorted out according to the various categories contained in the application for registration form.

b) Pre-screening shall be done for all the applications in each category to determine responsiveness by providing copies of:

- i. Bidder Declaration Form (available on supplier's dashboard on SRM eProcurement Portal)
- ii. Confidential Business Questionnaire (Electronic)
- iii. Incorporation/Registration certificate
- iv. Valid Tax Compliance Certificate
- v. Current Trade License / Business Permit
- vi. PIN/VAT Certificate
- vii. Copy of CR 12 or CR 13
- viii. Memorandum of association OR CR1, CR8, CR2

c) A list shall be compiled for those applicants who pass the preliminary evaluation to be evaluated in detail.

b. Qualification Evaluation

Qualification Evaluation is to examine whether submitted documents comply with the qualification requirements by using a scoring criterion.

a) The evaluation committee shall undertake a thorough and objective analysis of the suppliers contained in the list.

b) A detailed assessment of each applicant will be made in the course of evaluating the application.

c) Applications will be evaluated against the criteria in the table below.

Evaluation Criteria

#	Mandatory Requirements	Required (Yes/No)	Max Score
1	Bidder Declaration Form (available on supplier's dashboard on SRM eProcurement Portal)	Yes	Pass/ fail
2	Confidential Business Questionnaire (available electronically on SRM eProcurement Portal)	Yes	Pass/ fail
3	Copy of Certificate of Incorporation/Business Registration	Yes	Pass/ fail
4	Copy of a valid and current Tax Compliance Certificate	Yes	Pass/ fail
5	Copy of PIN/VAT Certificate	Yes	Pass/ fail
5	Copy of Current Trade License / Business Permit	Yes	Pass/ fail
6	Memorandum of association OR CR12	Yes	Pass/ fail
7	Specific category requirements e.g. Valid Practicing certificates, Manufacturers or distributors license, Special Licenses, Registration with Professional bodies etc (if required in your category - refer to the category requirements on section IV of this supplier guide)	Yes	Pass/ fail

Demonstration of Past Experience		
a) Age of Company		5
Above 10 years (5 Marks)		
Between 7-10 Years (4 Marks)		
Between 4-6 Years (3 Marks)		
Between 1-3 Years (2 Marks)		
Below 1 Year (1 Marks)		
b) Three letters of recommendation from your major clients for similar services- 5 marks each, Total 15 Marks		15
c) At least three copies of LPOs or Contracts from your major clients for the last 3 years - 5 marks each, Total 15 Marks		15
h) Evidence of physical address and premises supported by tenancy agreement, lease, title, OR a utility bill utility bill		10
Financial Capacity		
a) Audited financial statements for the last 2 years (2023, 2022) signed by qualified registered auditors– 5 marks each, Total 10 Marks		10
If Audited financial statements are not provided, please provide Bank statement for the last 3 months - 5 marks		
b) Liquidity Ratio– 1 mark for each year if ratio >1, Total 5 Marks		5
c) Attach letter of reference from the Banker to support bank relations = 5 marks		5
d) Accept 30 days credit= 5 marks		5
Manpower and staffing		

a) Company Profile (organogram, business overview, products/services, clients, vision, mission, markets)– 2 mark each, Total 10 Marks	10
b) At least 3 CVs of key management personnel and supervisory team -3 marks each, Total 9 Marks	9
c) Academic and professional qualification (e.g. masters, bachelors, diploma degree certification) of at least 3 key staff for matching CVs provided above- 2 marks each, Total 6 Marks	6
d) Indicate the number of staff in your organization:	5
Above 20 (5 Marks)	
Between 11-20 (4 Marks)	
Between 6-10 (3 Marks)	
Between 1-5 (2 Marks)	
TOTAL (Weighted to 100%)	100

SECTION IV - REGISTRATION CATEGORIES

Category Code	Descriptions	Special License/Requirement
CATEGORY A. SUPPLY AND DELIVERY OF GOODS		
CHAI/A/01/2025/26	Supply of general office stationery, computer consumables (genuine toners/ cartridges, ribbons etc.) & accessories	
CHAI/A/02/2025/26	Design and supply of branded promotional materials (t-shirts, caps, carrier bags, banners, gift bags, pens, calendars, diaries etc.), vehicle branding and branded office shirts	
CHAI/A/03/2025/26	Supply of printed branded communication materials including newsletters, brochures, membership application forms, teller receipts, business cards, loan application forms, annual financial reports, etc.	
CHAI/A/04/2025/26	Supply of computers, laptops, IPAD, printers, scanners, and other related ICT hardware & accessories	Distributors License
CHAI/A/05/2025/26	Supply and maintenance of servers and Dr (database recovery) sites	
CHAI/A/06/2025/26	Supply of software & licenses, office applications, Microsoft licenses and anti-virus software & firewall software.	
CHAI/A/07/2025/26	Supply and maintenance of security access control devices and biometric equipment	
CHAI/A/08/2025/26	Supply and servicing of PABX, telephone heads and other telecommunication equipment, spares and accessories	
CHAI/A/09/2025/26	Supply, installation & maintenance of WAN, LAN networking systems and materials.	
CHAI/A/10/2025/26	Supply & delivery of building materials, hardware & paints, water piping & fittings.	
CHAI/A/11/2025/26	Supply and installation of electrical works	
CHAI/A/12/2025/26	Supply & servicing of office stamps & seal	
CHAI/A/13/2025/26	Supply and maintenance of ups & inverter power backup systems	
CHAI/A/14/2025/26	Supply and maintenance of safes, strong room doors, cash boxes and cash tills	

CHAI/A/15/2025/26	Supply and servicing of money counting machines (notes and coin) and fake money detectors.	
CHAI/A/16/2025/26	Supply, installation, servicing & maintenance of generators	
CHAI/A/17/2025/26	Supply and maintenance of firefighting equipment e.g. Fire extinguishers etc.	Provide copy of Fire Fighting Certificate from the County Government
CHAI/A/18/2025/26	Supply of office assorted furniture and fittings including window blinds	
CHAI/A/19/2025/26	Supply, installation, servicing and maintenance of alarm system	
CHAI/A/20/2025/26	Supply of motor vehicles and motorcycles	
CHAI/A/21/2025/26	Supply, installation, servicing and maintenance of CCTV	
CHAI/A/22/2025/26	Supply, installation, servicing and maintenance of air conditioners	
CHAI/B/23/2025/26	Supply and installation of motor vehicles and motorcycles auto spare parts	
CHAI/B/24/2025/26	Supply, installation, servicing and maintenance of banking hall ticketing/ queuing kiosk, its accessories and parts	
CATEGORY B. PROVISION OF SERVICES		
CHAI/B/25/2025/26	Provision of motor vehicles and motorcycles garage services including; computer diagnosis and scanning, minor and major repairs, interior cleaning etc..	
CHAI/B/26/2025/26	Provision of security guarding services	
CHAI/B/27/2025/26	Provision of cash in transit services	
CHAI/B/28/2025/26	Provision of general cleaning and sanitary services	
CHAI/B/29/2025/26	Provision of valuation services (land & motor vehicles)	Valid practicing license/certificate from Valuers Registration Board (VRB)
CHAI/B/30/2025/26	Provision of vehicle and motorcycles tracking/fleet management services	
CHAI/B/31/2025/26	Provision of roadshow services	
CHAI/B/32/2025/26	Provision of debt collection services	

CHAI/B/33/2025/26	Provision of auctioneering services	Current practicing certificate issued by the Auctioneers licensing Board or proof of membership from Kenya National Auctioneering Association
CHAI/B/34/2025/26	Provision of medical insurance cover	Provide valid copy of IRA license
CHAI/B/35/2025/26	Provision of general insurances cover (loan protection cover, deposit cover, GPA/WIBA, group life cover, fidelity cover, money cover, fire & peril, all risk cover, burglary cover and comprehensive insurance cover for motor vehicles & motorcycles).	Provide valid copy of IRA license
CHAI/B/36/2025/26	Provision of cyber security insurance cover	
CHAI/B/37/2025/26	Provision of building (builders work) contractors' services	Provide Valid NCA Certificate
CHAI/B/38/2025/26	Provision of building (service works plumbing and related services) contractors' services	Provide Valid NCA Certificate
CHAI/B/39/2025/26	Provision of building (service works joinery, fixtures and fittings and related services) contractors' services	
CHAI/B/40/2025/26	Provision of skip tracing services	
CHAI/B/41/2025/26	Provision of verification and authentication of documents and identity background check.	
CHAI/B/42/2025/26	Provision of air tickets and booking services.	
CHAI/B/43/2025/26	Provision of transport, motor leasing and taxi services.	
CHAI/B/44/2025/26	Provision of fixed assets verification & valuation services.	Valid practicing license/certificate from Valuers Registration Board (VRB)
CHAI/B/45/2025/26	Provision of team building facilitation services.	
CHAI/B/46/2025/26	Provision of internet services and cloud services.	
CHAI/B/47/2025/26	Provision of minor office maintenance works e.g. Office repairs, partitioning, painting, plumbing and related services.	
CHAI/B/48/2025/26	Provision of electronic document management system -EDMS (registry automation).	

CHAI/B/49/2025/26	Provision of digital communication, signage, graphic designing and outdoor advertising services	
CHAI/B/50/2025/26	Provision of social media management and digital media strategy.	
CHAI/B/51/2025/26	Provision of event management & decoration services.	
CHAI/B/52/2025/26	Provision of interior design, furnishing and decoration.	
CHAI/B/53/2025/26	Provision of air travel agency services.	Copy of Valid IATA Certificate of Accreditation or KATA membership certificate or TRA license
CHAI/B/54/2025/26	Provision of courier/mail services.	
CHAI/B/55/2025/26	Provision of photography/videography, Sacco documentary, public address systems and related services.	
CHAI/B/56/2025/26	Provision of leased printers.	
CHAI/B/57/2025/26	Provision of development, hosting and maintenance of website.	
CHAI/B/58/2025/26	Provision of hotel, conference and accommodation services.	Valid TRA Certificate
CHAI/B/59/2025/26	Repairs, maintenance and servicing of computer, printers, photocopiers and office equipment.	
CHAI/B/60/2025/26	Servicing and maintenance of electrical equipment.	
CHAI/B/61/2025/26	Provision of fumigation services.	
CHAI/B/62/2025/26	Provision of catering services.	Valid food handlers' certificate from public health for the company
CHAI/B/63/2025/26	Provision of security alarm system maintenance services.	
CHAI/B/64/2025/26	Provision of email security services.	
CHAI/B/65/2025/26	Provision of credit reference bureau (CRB) services.	
CATEGORY C. PROVISION CONSULTANCY/SPECIALIZED SERVICES		
CHAI/C/66/2025/26	Provision of legal services.	Valid practicing license from Law Society of Kenya

CHAI/C/67/2025/26	Provision of architectural services (or consortium).	Registration certificate with Board of Registration of Architects and Quantity surveyors (BORAQ's) for Firm
CHAI/C/68/2025/26	Provision of risk management framework services.	
CHAI/C/69/2025/26	Provision of external audit services.	ICPAK License
CHAI/C/70/2025/26	Provision of public relations and advertising agency services.	
CHAI/C/71/2025/26	Provision of marketing research services and product development.	
CHAI/C/72/2025/26	Provision of consultancy services on Sacco re-branding.	
CHAI/C/73/2025/26	Provision of consultancy services in project management.	
CHAI/C/74/2025/26	Provision of offsite data backup & replication services.	
CHAI/C/75/2025/26	Provision of bulk SMS services.	
CHAI/C/76/2025/26	Provision of consultancy in occupation, healthy & safety and fire audits.	
CHAI/C/77/2025/26	Provision of fire safety training & first aid training	
CHAI/C/78/2025/26	Provision of staff recruitment, training and other hr related services	
CHAI/C/79/2025/26	Provision of pre-employment screening and background check services	
CHAI/C/80/2025/26	Provision of business central ERP annual support	
CHAI/C/81/2025/26	Provision of customer relationship management (CRM) system annual support	
CHAI/C/82/2025/26	Provision of queuing management system (QMS) annual support	
CHAI/C/83/2025/26	Provision of tax consultancy services	ICPAK License
CHAI/C/84/2025/26	Provision of staff guidance and counselling services	
CHAI/C/85/2025/26	Provision of consultancy in Sacco governance, leadership & management	
CHAI/C/86/2025/26	Provision of consultancy in credit management	
CHAI/C/87/2025/26	Provision of ICT system security audit services	
CHAI/C/88/2025/26	Provision of environmental impact assessment (EIA) services	

CHAI/C/89/2025/26	Provision of consultancy for implementation of IFRS 9 & IFRS 16	
CHAI/C/90/2025/26	Provision of managed security services for IC+T infrastructure & systems.	
CHAI/C/91/2025/26	Provision of QMS certification services	
CHAI/C/92/2025/26	Provision of consultancy on QMS services	
CHAI/C/93/2025/26	Provision of online supplier prequalification services	