CPF

Fulfilling Lives

RFP FOR THE DEVELOPMENT OF CPF CUSTOMER EXPERIENCE STRATEGIC PLAN

RFP NO: CPF/03/2026/THE DEVELOPMENT OF CPF CUSTOMER EXPERIENCE STRATEGIC PLAN

MARCH 2026

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CONTENTS

1.0 SECTION I - LETTER OF INVITATION 4
2.1 Introduction 5
1.1. Clarification and Amendment of RFP Documents 6
1.2. Preparation of Technical Proposal 6
1.3. Preparation of Financial Proposal 8
1.4. Submission, Receipt, and Opening of Proposals 8
1.5. Proposal Evaluation General 9
1.6. Evaluation of Technical Proposal 9
1.7. Public Opening and Evaluation of Financial Proposal 10
1.8. Negotiations 11
1.9. Award of Contract 11
1.10. APPENDIX TO INFORMATION TO CONSULTANTS (ITC) 13
1.11. EVALUTION CRITERIA 15
1.12. TECHNICAL PROPOSAL SUBMISSION FORM 19
1.13. MANDATORY CONFIDENTIAL BUSINESS QUESTIONNAIRE 21
1.14. MANDATORY ANTI-CORRUPTION DECLARATION 24
1.15. RECOMMENDATION LETTERS 25
1.16. REFERENCE LETTER 26
1.17. COMMENTS AND SUGGESTIONS OF CONSULTANTS ON THE TERMS OF REFERENCE AND ON DATA, SERVICES AND FACILITIES TO BE PROVIDED BY SCHEME. 27
1.18. DESCRIPTION OF THE METHODOLOGY AND WORK PLAN FOR PERFORMING THE ASSIGNMENT 28
1.19. TEAM COMPOSITION AND TASK ASSIGNMENTS STAFFING FORM 29
1.20. FORMAT OF CURRICULUM VITAE (CV) FOR PROPOSED PROFESSIONAL STAFF 30
1.21. ACTIVITY TIME SCHEDULE FOR THE ASSIGNMENT 31
2.0 SECTION IV: - FINANCIAL PROPOSAL 32
2.1. FINANCIAL PROPOSAL SUBMISSION FORM 32
2.2. BREAKDOWN OF CONTRACT PRICE 34
3.0 SECTION V -TERMS OF REFERENCE 35
3.1. IMPROVEMENTS TO TORs 37

4.0 SECTION VI: FORM OF CONTRACT 38

4.1. CONTRACT AGREEMENT FORM..... 38

4.2. FORM 6: CERTIFICATE OF INDEPENDENT TENDER DETERMINATION 41

4.3. FORM 7: SELF-DECLARATION ON DEBARMENT- 43

1.0 SECTION I - LETTER OF INVITATION

CPF Financial Services Ltd invites interested eligible bidders to submit their bids for **the development of CPF Customer Experience Strategic Plan.**

1.1. A complete set of tender documents may be downloaded by interested candidates free of charge from www.cpf.or.ke. All bidders taking part in this tender must forward their particulars immediately for recording and any further clarifications and addenda to info@cpf.or.ke /procurement@cpf.or.ke (**Company Name and Contact Details).**

1.2. Tendering will be conducted through the Bidding procedures specified in the Public Procurement and Asset Disposal Act, 2015, the Public Procurement and Disposal Regulations, 2020.

1.3. Interested firms may obtain further information on the tender document from.
Name of Procuring Entity: CPF Financial services
Physical address: Procurement office, Mezzanine floor CPF House
Postal Address: P.O Box 28938-00200 Nairobi Kenya
info@cpf.or.ke /procurement@cpf.or.ke

1.4. Completed Tenders are to be enclosed in plain sealed envelopes (separated as technical proposal and financial proposal), marked with the tender reference number and name, and be deposited at CPF House, Procurement office, Mezzanine Floor addressed to:

CPF Financial services
Procurement Office,
Mezzanine Floor CPF House
P.O Box 28938-00200 Nairobi Kenya
info@cpf.or.ke /procurement@cpf.or.ke
To be received on or before 20th March 2026 at 11.00 A.M.

1.5. All tenderers whose applications will have been received before the closing date and time will be advised of the results of their applications.

1.6. Prices quoted should be inclusive of all taxes and delivery costs to the required site (where applicable) and must be in Kenya Shillings and shall remain valid for One Hundred and Twenty (120) days from the closing date of the tender.

1.7. You are informed that it is not permissible to transfer this invitation to any other Consultant. A consultant will be selected under Quality and Cost Based Selection Method (QCBS) described in this RFP, in accordance with the policies established in the Public Procurement and Asset Disposal Act [PPDA] 2015.

1.8. The Scheme reserves the right to accept or reject any tender and may annul the tendering process and reject all tenders at any time prior to contract award without thereby incurring any liability to the affected tenderer or tenderers

1.0 SECTION II – INFORMATION TO CONSULTANTS (ITC)

1.1 General Provisions – Definitions

i. "Client" means the CPF Financial Services Ltd.

ii. "Consultant" means the firm that has signed the contract with CPF Financial Services Ltd.

iii. "Contract" means a legally binding written agreement signed between CPF Financial Services Ltd and the Consultant and includes all the attached documents listed in Conditions of Contract.

iv. "Personnel" means an individual professional whose skills, qualifications, knowledge and experience are critical to the performance of the Services under this Contract and whose CV is taken into account in the short listing the Consultant's invited to submit proposals.

v. "Non-Key Personnel" means an individual professional provided by the Consultant who is assigned to perform the Services or any part thereof under the Contract and whose CVs are not evaluated individually.

vi. "Proposal" means the Technical and Financial Proposal of the Consultant.

vii. "Services" means the work to be performed by the Consultant pursuant to the Contract.

viii. "TORs" means the "Terms of Reference" that explain the objectives, scope of work, activities, and tasks to be performed, respective responsibilities of DB Scheme and the Consultant, and expected results and deliverables of the assignment.

2.1 Introduction

2.1.1 The Client named in the Appendix to "ITC" will select a firm among those invited to submit a proposal, in accordance with the method of selection detailed in the appendix.

2.1.2 The Consultants are invited to submit a Technical Proposal and a Financial Proposal, as specified in the Appendix "ITC" for consulting services required for the assignment named in the said Appendix.

2.1.3 The Consultants must familiarize themselves with local conditions and take them into account in preparing their proposals. To obtain firsthand information on the assignment and on the local conditions, Consultants are encouraged to liaise with Scheme regarding any information that they may require before submitting a proposal.

2.1.4 Scheme will provide the inputs specified in the Appendix "ITC", assist the firm in obtaining licenses and permits needed to carry out the services and make available relevant project data and reports.

2.1.5 Please note that:

i. the costs of preparing the proposal and of negotiating the Contract, including any visit to schemes are not reimbursable as a direct cost of the assignment; and
ii. Scheme is not bound to accept any of the proposals submitted.

2.1.6 Scheme's employees, committee members, board members and their relatives (spouse and children) are not eligible to participate.

2.1.7 The procuring entity shall allow the tenderer to download the RFP document free of charge.

1.1. Clarification and Amendment of RFP Documents

2.1.8 Consultants may request a clarification of any of the RFP documents only up to seven [7] days before the proposal submission date. Any request for clarification must be sent in writing by paper mail, or electronic mail to Scheme's address indicated in the Appendix "ITC". Scheme will respond by electronic mail to such requests and will send written copies of the response (including an explanation of the query but without identifying the source of inquiry) to all invited Consultants who intend to submit proposals.

2.1.9 At any time before the submission of proposals, Scheme may for any reason, whether at his own initiative or in response to a clarification requested by an invited firm, amend the RFP. Any amendment shall be issued in writing through addenda. Addenda shall be sent by mail, cable, telex or facsimile to all invited Consultants and will be binding on them. Scheme may at his discretion extendthe deadline for the submission of proposals.

1.2. Preparation of Technical Proposal

2.1.10 The Consultants proposal shall be written in English language

2.1.11 In preparing the Technical Proposal, Consultants are expected to examine the documents constituting this RFP in detail. Material deficiencies in providing the information requested may result in rejection of a proposal.

2.1.12 While preparing the Technical Proposal, Consultants must give particular attention to the following:

(i) If a firm considers that it does not have all the expertise for the assignment, it may obtain a full range of expertise by associating with individual consultant(s) and/or sub- consultancy as appropriate. Consultants shall not associate with the other Consultants invited for this assignment. Firms associating in contravention of this requirement shall automatically be disqualified. In all cases the shortlisted firm must

ensure that proposed key staff do not appear on the proposal of any other shortlisted firm. Firms with proposed key staff in contravention of this requirement shall automatically be disqualified.

(ii) For assignments on a staff-time basis, the estimated number of professional staff-time is given in the Appendix. The proposal shall, however, be based on the number of professional staff-time estimated by the firm.

(iii) It is desirable that the majority of the key professional staff proposed be permanent employees of the firm or have an extended and stable working relationship with it.

(iv) Proposed professional staff must as a minimum, have the experience indicated in the RFP to Information to Consultants, preferably working under conditions similar to those prevailing in Kenya.

(v) Alternative professional staff shall not be proposed and only one Curriculum Vitae (CV) may be submitted for each position.

2.1.13 The Technical Proposal shall provide the following information using the attached Standard Forms.

(i) A brief description of the firm's organization and an outline of recent experience on assignments of a similar nature. For each assignment the outline should indicate inter alia, the profiles of the staff proposed, duration of the assignment, contract amount and firm's involvement.

(ii) Any comments or suggestions on the Terms of Reference, a list of services and facilities to be provided by Scheme.

(iii) A description of the methodology and work plan for performing the assignment.

(iv) The list of the proposed staff team by specialty, the tasks that would be assigned to each staff team member and their timing.

(v) CVs recently signed by the proposed professional staff and the Authorized representative submitting the proposal. Key information should include number of years working for the firm/entity and degree of responsibility held in various assignments during t h e period stated in the technical evaluation criteria.

(vi) Estimates of the total staff input (professional and support staff-time) needed to carry out the assignment supported by bar chart diagrams showing the time proposed for each professional staff team member.

(vii) A detailed description of the proposed methodology, Staffing and

Monitoring of training.

(viii) Any additional information requested.

2.1.14 The Technical Proposals shall not include any financial information.

1.3. Preparation of Financial Proposal

2.1.15 In preparing the Financial Proposal, Consultants are expected to take into account the requirements and conditions outlined in the RFP documents. The Financial Proposal should follow Standard Forms (Section D). It lists all costs associated with the assignment including (a) remuneration for staff (in the field and at headquarters), and; (b) reimbursable expenses such as subsistence (per diem, housing), transportation (international and local, for mobilization and demobilization), services and equipment (vehicles, office equipment, furniture, and supplies), office rent, insurance, printing of documents, surveys, and training, if it is a major component of the assignment. If appropriate these costs should be broken down by activity.

2.1.16 The Financial Proposal should clearly identify as a separate amount, the local taxes, duties, fees, levies and other charges imposed under the law on the Consultants, the sub-Consultants and their personnel.

2.1.17 Commissions and gratuities, if any, paid or to be paid by consultants and related to the assignment will be listed in the Financial Proposal Submission Form.

2.1.18 The Proposal must remain valid for 120 days after the submission date. During this period, the consultant is expected to keep available, at his own cost, the professional staff proposed for the assignment. The Scheme will make his best effort to complete negotiations within this period. If t h e Scheme wishes to extend the validity period of the proposals, the Consultants shall agree to the extension.

1.4. Submission, Receipt, and Opening of Proposals

2.1.19 The original Technical Proposal and 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.

2.1.20 For each proposal, the Consultants shall prepare the number of copies indicated in Appendix "ITC". 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.

2.1.21 The Tenderer is required to serialize all pages for each bid submitted.

2.1.22 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 WITH THE TECHNICAL PROPOSAL". Both envelopes shall be placed into an outer envelope and sealed. This outer envelope shall bear the submission address and other information indicated in the Appendix "ITC" and is clearly marked, "DO NOT OPEN, EXCEPT IN PRESENCE OF THE OPENING COMMITTEE."

2.1.23 The c o m p l e t e d Technical and Financial Proposals must be delivered at The Submission address on or before the time and date stated in the "ITC". Any proposal received after the closing time for submission of proposals shall be returned to the respective consultant unopened.

2.1.24 After the deadline for submission of proposals, the Technical Proposal shall be opened immediately by the opening committee. The Financial Proposal shall remain sealed and deposited with a responsible officer of Scheme department up to the time for public opening of financial proposals.

1.5. Proposal Evaluation General

2.1.25 From the time the bids are opened to the time the Contract is awarded, if any consultant wishes to contact Scheme on any matter related to his proposal, he should do so in writing at the address indicated in the Appendix "ITC". Any effort by the firm to influence scheme in the proposal evaluation, proposal comparison or Contract award decisions may result in the rejection of the consultant's proposal.

2.1.26 Evaluators of Technical Proposals shall have no access to the Financial Proposals until the technical evaluation is concluded.

1.6. Evaluation of Technical Proposal

2.1.27 The evaluation committee appointed by the Client shall evaluate the proposals on the basis of their responsiveness to the Terms of Reference, applying the evaluation criteria as indicated in the Appendix to Information to consultants. Each responsive proposal will be given a technical score (St). Actual score points are provided in the Appendix "ITC". A proposal shall be rejected at this stage if it does not respond to important aspects of the Terms of Reference or if it fails to achieve the minimum technical score indicated in the Appendix "ITC".

1.7. Public Opening and Evaluation of Financial Proposal

2.1.28 After Technical Proposal evaluation, Scheme shall notify those Consultants whose proposals did not meet the minimum qualifying mark or were considered non - responsive to the RFP and Terms of Reference, indicating that their Financial Proposals will be returned after completing the selection process. Scheme shall simultaneously notify the Consultants who have secured the minimum qualifying mark, indicating the date and time set for opening the Financial Proposals and stating that the opening ceremony is open to those Consultants who choose to attend. The opening date of the financial proposal shall be after completing technical evaluation. The notification may be sent by registered letter, cable, telex, facsimile or electronic mail to invite the bidder for opening ceremony.

2.1.29 The Financial Proposals shall be opened publicly in the presence of the consultants' representatives who choose to attend. The name of the consultant, the technical scores and the proposed prices shall be read aloud and recorded when the Financial Proposals are opened. Scheme shall prepare minutes of the public opening.

2.1.30 The evaluation committee will determine whether the financial proposals are complete (i.e. whether the consultant has cost all the items of the corresponding Technical Proposal I and correct any computational errors. The cost of any unpriced items shall be assumed to be included in other costs in the proposal. In all cases, the total price of the financial proposal as submitted shall prevail.

2.1.31 While comparing proposal prices between local and foreign firms participating in a selection process in financial evaluation of proposals, firms incorporated in Kenya where indigenous Kenyans own 51% or more of the share capital shall be allowed a 10% preferential bias in proposal prices. However, there shall be no such preference in the technical evaluation of the tenders. Proof of local incorporation and citizenship shall be required before the provisions of this sub-clause are applied. Details of such proof shall be attached by the Consultant in the financial proposal.

2.1.32 This shall be based on Least Cost Selection.

2.1.33 The tender evaluation committee shall evaluate the tender within 21 days from the date of opening the tender.

2.1.34 Contract price variations shall not be allowed for contracts not exceeding one year (12 months).

2.1.35 Where contract price variation is allowed, the variation shall not exceed 10% of the original contract price.

2.1.36 Price variation requests shall be processed by scheme within 30 days of receiving the request.

1.8. Negotiations

2.1.37 Negotiations will be held at the same address as "address to send information to CPF Financial Services Ltd" indicated in the Appendix "ITC". The aim is to reach agreement on all points and sign a contract.

2.1.38 Negotiations will include a discussion of the Technical Proposal, the proposed methodology (work plan), staffing and any suggestions made by the firm to improve the Terms of Reference. Scheme and firm will then work out final Terms of Reference, staffing and bar charts indicating activities, staff periods in the field and in the head office, staff -months, logistics and reporting. The agreed work plan and final Terms of Reference will then be incorporated in the "Description of Services" and form part of the Contract. Special attention will be paid to getting the most the firm can offer within the available budget and to clearly defining the inputs required from Scheme to ensure satisfactory implementation of the assignment.

2.1.39 Unless there are exceptional reasons, the financial negotiations will not involve the remuneration rates for staff (no fees breakdown).

2.1.40 Having selected the form on the basis of, among other things, an evaluation of proposed key professional staff, Scheme expects to negotiate a contract on the basis of the experts named in the proposal. Before contract negotiations, Scheme will require assurances that the experts will be actually available. Scheme will not consider substitutions during contract negotiations unless both parties agree that undue delay in the selection process makes such substitution unavoidable or that such changes are critical to meet the objectives of the assignment. If this is not the case and if it is established that key staff were offered in the proposal without confirming their availability, the firm may be disqualified.

2.1.41 The negotiations will conclude with a review of the draft form of the Contract. To complete negotiations Scheme and the selected firm will initial the agreed Contract. If negotiations fail, Scheme will invite the firm whose proposal received the second highest score to negotiate a contract.

2.1.42 Scheme shall appoint a team for the purpose of the negotiations.

1.9. Award of Contract

2.1.43 The Contract will be awarded following negotiations. After negotiations are completed, Scheme will promptly notify other Consultants on the shortlist

that they were unsuccessful and return the Financial Proposals of those Consultants who did not pass the technical evaluation.

2.1.44 The selected firm is expected to commence the assignment on the date and at the location specified as per contract.

2.1.45 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.

2.1.46 The Scheme may at any time terminate procurement proceedings prior to notification of tender award and shall not be liable to any person for the termination.

2.1.47 Scheme shall give notice of the termination to all persons who submitted tenders of the termination within fourteen days of termination and such notice shall contain the reason for termination.

2.1.48 To qualify for contract awards, the tenderer 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.

2.2 Confidentiality

2.2.1 Information relating to evaluation of proposals and recommendations concerning awards shall not be disclosed to the Consultants who submitted the proposals or to other persons not officially concerned with the process, until the winning firm has been notified that it has been awarded the Contract.

2.3 Corrupt or fraudulent practices

2.3.1 The Scheme requires that the Consultants observe the highest standards of ethics during the selection and award of the consultancy contract and also during the performance of the assignment. The tenderer shall sign a declaration that he/she has not and will not be involved in corrupt or fraudulent practices.

2.3.2 Scheme will reject a proposal for award if it determines that the consultant recommended for award has engaged in corrupt or fraudulent practices in competing for the contract in question.

2.3.3 Further a consultant who is found to have indulged in corrupt or

fraudulent practices risks being debarred from participating in public procurement in Kenya.

1.10. APPENDIX TO INFORMATION TO CONSULTANTS (ITC)

The following information for procurement of consultancy services and selection of consultants shall complement or amend the provisions of the information to consultants, wherever there is a conflict between the provisions of the information and to consultants and the provisions of the appendix, the provisions of the Appendix herein shall prevail over those of the information to Consultants.

Clause Reference

a) The name of client is: CPF Financial Services Ltd

b) Selection Method: Quality and cost-based selection method

c) Technical and Financial Proposals are requested: Yes

d) The name, objectives, and description of the assignment are: **CPF/RFP/03/2026/ RFP FOR THE DEVELOPMENT OF CPF CUSTOMER EXPERIENCE PLAN.** All enquiries regarding the RFP and the assignment can be made to: The name(s), address (es) and telephone numbers of Scheme's official(s) are:

Name of Procuring Entity: CPF Financial services LTD
Physical address: Procurement office, mezzanine floor CPF House
Postal Address: P.O Box 28938-00200 Nairobi Kenya
info@cpf.or.ke /procurement@cpf.or.ke

e) Price Charged for RFP Document: Free of Charge.

f) Consultants may request a clarification of any of the RFP documents only if up to third of publication period remains to the submission date.

g) The estimated number of professional staff months required for the assignment is; 2 per month or any number that the consultant deems to be adequate for the assignment.

h) Reimbursable expenses costs Not Applicable

i) Taxes: All applicable taxes to be included in the Financial Proposals.

j) Consultants must submit an original and an additional one (1) copy of the technical proposal. Consultants must submit an original and additional one (1) copy of the financial proposal.

k) The proposal submission address is: CPF House, Procurement office, mezzanine floor.

l) Information on the outer envelope should also include:

CPF Financial services
Procurement Office,
Mezzanine Floor CPF House
P.O Box 28938-00200 Nairobi Kenya
info@cpf.or.ke /procurement@cpf.or.ke

and the information:

RFP for the Development of CPF Customer Experience Strategic Plan and clearly marked, "DO NOT OPEN, EXCEPT IN PRESENCE OF THE OPENING COMMITTEE."

m) Proposals must be submitted no later than **20th March 2026 at 11.00 AM**

n) The address to seek any information to Scheme is:

CPF Financial services
Procurement office, mezzanine floor CPF House
P.O Box 28938-00200 Nairobi Kenya
info@cpf.or.ke /procurement@cpf.or.ke

1.11. EVALUTION CRITERIA

(a) Mandatory Evaluation Criteria.

The Evaluation Committee shall evaluate the proposals on the basis of their responsiveness to the Terms of Reference and Mandatory Requirements of the RFP, applying the evaluation criteria as follow.

MR 1	Valid Tax Compliance Certificate (TCC).
MR 2	Registration certificate/ Certificate of incorporation.
MR 3	CR 12 certificate from Registrar of companies not older than 6 months.
MR 4	Confidential Business questionnaire duly filled and signed.
MR 5	Professional Indemnity Cover of not less than Kshs. 500,000.00
MR 6	Audited financial accounts for (2025 & 2024) the past two years. (signed and stamped by auditors).
MR 7	Attach Identification documents (IDs or Valid Passports) of the owners/Directors of the firms
MR 8	Bid document MUST be in original (1) and copy (1). (Financial be enclosed separately – form of tender)
MR 9	Attach a Declaration that the firm has not been debarred by PPRA from participating in Public Procurement
MR 10	Properly bound, paginated, serialized tender document (each page of the tender submission must chronologically number. i.e. 1,2,3,4,5,6,7,8,9,10….n (n being the last numerical page of the tender document)
MR 11	Dully filled Anti-corruption form (as per attached form)
MR 12	Valid certificate of good standing for the customer experience professional body.
MR 13	Must attach a copy of current business license
MR 14	Must attach a copy of the Power of Attorney certified by a commissioner of oath.

Note: Only bidders who meet above requirements will proceed to technical evaluation.

Technical Evaluation

1)	Firms Experience	1. N u m b e r of years the firm has been existence and providing similar consultancy services (3Marks) 4 years and above ----------3Mrks Above 1 year and below 2 years----------2Marks Below 1 year----------1Mark	3 Marks

2)	Specific experience of the Firm	1.The consultant must demonstrate experience in undertaking significant and similar assignments in provision of strategy formulation in the last 5 years. Please highlight no more than four (4) critically relevant organizations/clients. Provide evidence of the three engagements by attaching proof of copy of contract/LSO (with contact details of the respective clients). Additionally, please attach a letter authorizing. CPF that it may confirm the details of the references if it deems. appropriate – 8Marks	8 Marks
3)	Qualifications and experience of the proposed team to handle the project.	1. Qualification and experience of key staff: (16 marks) ➢ Team leader must have a Bachelor's degree in a relevant related field (3 marks) ➢ Related professional qualifications (e.g. Customer Experience certification) (5 marks) Over 5 years of experience in CX strategy development and implementation support (8marks) ➢ Below 5 years…….1.5 Marks **Provide CV for the team leader in your own format and certified copies of academic and professional certificates for proof and to earn marks**	16 Marks
		2. Other staff qualification and experience: (10 marks) Respective support staff should possess: ➢ A relevant business-related degree (4 marks) Professional qualification in relevant fields (Customer Experience) (2 marks) At least 3 years of relevant experience – (4 marks) Provide CVs (no more than 3 pages per individual) for the said personnel in your own format and certified copies of academic and professional certificates for proof and to earn marks	10 Marks
4.	Methodology and work Plan	Provide a detailed and comprehensive work plan and methodologies on how You intend to execute the exercise once awarded the contract be specific and Clear on each Milestone -(15 marks)	15 Marks
5.	Financial Stability of the Firm.	The consultant should be financially stable with a minimum operational. capital of at least Kshs. 1,000,000.00. To this effect, provide past three years financials or any other proof of financial stability (Letter of credit from your reputable bank) (4 marks)	4 Marks
		I. PHASE 3 –Additional Technical Requirements (4 Marks Proposed improvement of the Terms of Reference (2marks) II. Readiness to offer post implementation support. Describe your firm's willingness and ability to offer support after the final product should the client require the same. Provide proof of past post implementation support. (2Marks)	4 Marks

5)	Oral presentation	Proposers who have met the mandatory requirements will be required to make or presentations of how they intend to execute the assignment and also provide details of the team composition for the task. Information from the oral presentation will also be used part of the Technical Evaluation process. CPF reserves the right to incorporate elements from oral presentations in the final Contract. (10marks)	10Marks
Total Score for Technical Proposal = 70 Marks. **Pass mark of 50 marks.**			

NOTE.

The financial envelope will be opened after technical evaluation for the firms that attain the technical pass mark of **70 marks out of 100 marks**.
Financials shall include.

1. Completed, signed, and stamped form of tender (financial proposal 4.1)
2. Financial breakdown – fully filled, signed, and stamped. (Financial breakdown 4.2)

(All in the format provided in the tender document)

1.0 SECTION III: - TECHNICAL PROPOSAL

3.0 TECHNICAL PROPOSAL FORMS

3.1 The Consultant shall complete this form and submit it as part of the Consultant's proposal, attaching all technical submissions as required and the technical proposal forms provided.

3.2 In preparing the technical proposals the consultant is expected to examine all terms and information included in the RFP. Failure to provide all requested information shall be at the consultant's own risk and may result in rejection of the consultant's proposal.

3.3 The technical proposal shall provide all required information and any necessary additional information and shall be prepared using the standard forms provided in this Section.

3.4The Technical proposal shall not include any financial information unless it is allowed in the Appendix to information to the consultants or the Special Conditions of contract.

1.12. TECHNICAL PROPOSAL SUBMISSION FORM

Date……

To:
CPF Financial services

Procurement Office,

Mezzanine Floor CPF House

P.O Box 28938-00200 Nairobi Kenya

info@cpf.or.ke /procurement@cpf.or.ke

Dear Sir,

RFP for the Development of CPF Customer Experience Strategic Plan.

We, the undersigned, offer to provide the consulting services for the above-mentioned in accordance with your request for proposals dated [insert date]. We are hereby submitting our Technical Proposal, in response to your invitation to us to submit a technical proposal and a financial proposal.

We hereby declare that

a) All the information and statements made in this Technical Proposal are true and we accept that any misinterpretation or misrepresentation contained in this Proposal may lead to our disqualification by Scheme.

b) Our Proposal shall be valid and remain binding upon us for the period of 120 days from the date of tender/proposal opening.

c) We have no conflict of interest.

d) In competing for (and, if the award is made to us, in executing) the Contract, we undertake to observe the laws against fraud and corruption, including bribery, in force in the country of Kenya

e) We undertake to negotiate a Contract on the basis of the technical proposal to carry out the assignment.

f) We accept that there will be no substitution of key personnel for reasons which may lead to the termination of Contract negotiations and even the contract itself.

g) Our Proposal is binding upon us and it is subject to any modifications resulting from the Contract negotiations.

We undertake, if our Proposal is accepted and the Contract is signed, to initiate the Services related to the assignment no later than the date indicated in the negotiated contract. We understand that Scheme is not bound to accept any Proposal that it receives.

We remain,

Yours Sincerely,

Authorized Signature

Name of Consultant

Address

Contact Phone

Contact e-mail address):

Stamp or Seal

1.13. MANDATORY CONFIDENTIAL BUSINESS QUESTIONNAIRE

(Must be filled by all applicants or Tenderers' who choose to participate in this tender) Name of Applicant (s)……
You are requested to give the particulars in Part1 and either Part 2 (a), 2(b) or 2(c), which ever applies to your type of business. Part 2(d) to part 2(i/j) must be filled. You are advised that giving wrong or false information on this Form will lead to automatic disqualification/termination of your business proposal at your cost.

Part 1 – General
Business Name
Certificate of Incorporation /Registration No……
Location of Business premises: Country……..…Physical address……
Town……Building……
Floor……Plot No……
Street/Road……Postal Address……
Postal/Country Code……Telephone No's…...……
Fax No's……E-mail address……
Website……
Contact Person (Full Names)……
Direct/Mobile
No's……Title……
……
Power of Attorney (Yes/No) If Yes, attach written document.
Nature of Business (Indicate whether manufacturer, distributor, etc)……..……..

Part 2 (a)–Sole Proprietor (if applicable)
Full names……
Nationality……..Country of Origin……
Company Profile (Attach brochures or annual reports in case of public company)

Part2 (b)–Partnerships (if applicable)
Give details of partners as follows:
Full Names Nationality Citizenship Details Shares
1. ……
2. ……
Company Profile……(Attach brochures)
Part2 (c)–Registered Company (If applicable)
Private or public……

Company Profile……(Attach brochures or annual reports in case of public companies)
State the nominal and issued capital of the Company
Nominal KShs……..……
Issued KShs……..……
List of top ten (10) shareholders and distribution of shareholding in the company. Give details of all Directors as follows:-
Full Names Nationality Citizenship Details Shares

Part 2(d)– Debarment
I/We declare that I/We have not been debarred from any procurement process and shall not engage in any fraudulent, corrupt, coercive and obstructive acts with regard to this or any other tender by any public or private institutions.

Full Names……..……
Signature……
Dated this……day of…2026.
In the capacity of……
Duly authorized to sign Tender for and on behalf of……

Part 2(e) – Bankruptcy/Insolvency/receivership.
I/We declare that I/We have not been declared bankrupt or insolvent by the competent Authorities in Kenya and neither are we under receivership:
Full Name……..……
Signature……
Dated this……day of……..2026.
In the capacity of……
Duly authorized to sign Tender for and on behalf of……

Part 2(f) –Criminal Offence
I/We, (Name(s)of Director(s)):- ……..……
Have not been convicted of any criminal offence relating to professional conduct or the making of false statements or misrepresentations as to its qualifications to enter in to a procurement contract within a period of three (3) years preceding the commencement of procurement proceedings. Signed……
For and on behalf of M/s
In the capacity of……
Dated this……day of 2026.
Suppliers'/Company's Official Rubber Stamp……

Part2(g) – Conflict of Interest

I/We, the undersigned state that I /We have no conflict of interest in relation to this procurement:

a)……

For and on behalf of M/s ……..

In the capacity of ……

Dated this ……day of 2026

Suppliers'/Company's Official Rubber Stamp……

Part2(h) – Interest in the Firm:

Is there any person/persons in Scheme or any other public institution who has interest in the Firm? Yes/No

(Delete as necessary) Institution……

(Title) (Signature) (Date)

Part2(I)– Experience:

Please list here below similar projects accomplished or companies/clients you have supplied with similar items or materials in the last 5years.

S/No.	Company Name	Country	Contract/Order No.	Value	Contact person (Full Names)	E-mail address	Cell phone No.
1							
2							
3							
4							

Part 2 (I or j)–Declaration

I/We, the undersigned state and declare that the above information is correct and that I/We give authority to seek any other references concerning my/our company from whatever sources deemed relevant, e.g. Office of the Registrar of Companies, Bankers, etc.

Full names……

Signature……

For and on behalf of M/s……

In the capacity of……

Dated this day of 2026.

Suppliers'/Company's

Official Rubber Stamp……

1.14. MANDATORY ANTI-CORRUPTION DECLARATION

We underscore the importance of a free, fair and competitive procurement process that precludes abusive practices. In this respect we have neither offered nor granted directly or indirectly any inadmissible advantages to any public servant or other person nor accepted such advantages in connection with our bid, nor will we offer or grant or accept any such incentives or conditions in the present procurement process or, in the event that we are awarded the contract, in the subsequent execution of the contract. We also declare that no conflict of interest exists in the meaning of the kind described in the Public Procurement & Disposal Act 2015

We also underscore the importance of adhering to the law in the implementation of the project. We will inform our staff about their respective obligations and about their obligation to fulfill this declaration of undertaking and to obey the laws of the country.

We also declare that our company/sub-contractors/ all members of the consortium has/have not been debarred to engage in procurement/ included in the list of sanctions.

We acknowledge that, the client is entitled to terminate the contract immediately if the statements made in the Declaration of Undertaking were objectively false or the reason for exclusion occurs after the Declaration of Undertaking has been issued.

Dated this day of 2026.

(Name of company)

(Signature(s)

1.15. RECOMMENDATION LETTERS

(To be completed on clients Letterhead)

Our Ref:

Date.

Address

CPF Financial services
Procurement Office,
Mezzanine Floor CPF House
P.O Box 28938-00200 Nairobi Kenya
info@cpf.or.ke /procurement@cpf.or.ke

1.16. REFERENCE LETTER

This is to confirm that …. has offered consultancy services for our firm and we confirm the details as outlined below:

Assignment name:	Country:
Location within Country	Professional Staff Provided by your Firm
Client's contact person for the assignment: (telephone no. and email address)	
Address	Duration of Assignment
Start Date Completion date	Approx. value of services
Schemes (Fund) Value:	
Name of Associated consultants	
Name of Senior Staff Involved & functions performed Name Role Functions	
Description of Actual Services Provided:	

We are satisfied with the firms' performance has met our expectations in regard to the assignment.

We would not hesitate to recommend as a reliable and professional fund management company. You may reach us on the given addresses to confirm the details provided.

Yours faithfully,

1.17. COMMENTS AND SUGGESTIONS OF CONSULTANTS ON THE TERMS OF REFERENCE AND ON DATA, SERVICES AND FACILITIES TO BE PROVIDED BY SCHEME.

Provide and justify here any modifications or improvement to the Terms of Reference to improve performance in carrying out the assignment, such as deleting some activity you consider unnecessary, or adding another, or proposing a different phasing of the activities. Such suggestions should be concise and to the point and incorporated in your Proposal. Also provide comments on counterpart staff and facilities to be provided by Scheme to improve performance in carrying out the assignment. Scheme shall not be bound to any comments or suggestions provided.

On the Terms of reference:

1.
2.
3.
4.
5.

On the data, services and facilities to be provided by Scheme:

1.
2.
3.
4.
5.

1.18. DESCRIPTION OF THE METHODOLOGY AND WORK PLAN FOR PERFORMING THE ASSIGNMENT

Provide a section on Approach, Methodology and Work plan for performing the assignment that should include:

(a) Technical Approach and Methodology,
(b) Work Plan, and
(c) Organization and Staffing,

(a) Technical Approach and Methodology. In this chapter the Consultant should explain his/her understanding of the objectives of the assignment, approach to the services, methodology for carrying out the activities and obtaining the expected output, and the degree of detail of such output. The Consultant should highlight the problems being addressed and their importance and explain the technical approach the Consultant would adopt to address them. The Consultant should also explain the methodologies proposed to adopt and highlight the compatibility of those methodologies with the proposed approach.

(b) Work Plan. In this chapter the Consultant should propose the main activities of the assignment, their content and duration, phasing and interrelations, milestones (including interim approvals by Scheme), and delivery dates of the reports. The proposed work plan should be consistent with the technical approach and methodology, showing understanding of the TOR and ability to translate them into a feasible working plan. A list of the final documents, including reports and tables to be delivered as final output, should be included here. The work plan should be consistent with the "ACTIVITY (WORK) SCHEDULE FORM" on Paragraph 6 below.

(c) Organization and Staffing. In this chapter the Consultant should propose the structure and composition of the Consultant's team. The Consultant should list the main disciplines of the assignment, the key personnel responsible, and proposed technical and support staff. In addition to describing the structure and composition of the Consultant's team, the Consultants shall summarize it on the Staffing Form below.

1.19. TEAM COMPOSITION AND TASK ASSIGNMENTS STAFFING FORM

	Name of Key Personnel	Position	Tasks	Time required for assignment
1		Team Leader		
2		Assistant Consultant		
3				
4				
5				
	Name of Non-Key Personnel			
1				
2				
3				
4				
5				
6				

1.20. FORMAT OF CURRICULUM VITAE (CV) FOR PROPOSED PROFESSIONAL STAFF

The Consultant shall provide a signed CV of each of the Key Personnel, this must detail the number of years, the assignments handled, qualifications both professional and academic and skills.

1.21. ACTIVITY TIME SCHEDULE FOR THE ASSIGNMENT

The Consultant will prepare an activity schedule that will take care of all phases of the assignment, i.e. document review, field work and assembling of information and writing the reports. The Consultant will organize work Teams and timetable to complete this field work, including all associated travel/field costs. To this end, the Consultant will prepare an activity that would closely follow (but not necessarily be same as) the "Activity (Work) Schedule Format" below. The Consultant should derive these activities from the TOR, e.g. sampled contracts, Inception Report, field work, monthly reports, draft report, final report, etc. in sufficient detail.

2.0 SECTION IV: - FINANCIAL PROPOSAL

The Consultant shall complete this form and submit it as part of the Consultant's proposal, attaching all financial submissions as required herein and in the financial proposal forms provided.

2.1. FINANCIAL PROPOSAL SUBMISSION FORM

Date
To:
The Managing Director/CEO
CPF Financial Services
CPF House, 7th Floor
Along Haile Selassie Avenue
P.O. Box 28938 – 00200
Nairobi, Kenya

Dear Sir,

FINANCIAL PROPOSAL RFP FOR THE DEVELOPMENT OF CPF CUSTOMER EXPERIENCE STRATEGIC PLAN

a) We, the undersigned, offer to provide consulting services for RFP for the development of CPF Customer Experience Strategic Plan in accordance with your request for proposals dated [insert date] and our Technical Proposal. We are hereby submitting our Financial Proposal, in response to your invitation to us to submit a technical proposal and a financial proposal. Our attached Financial Proposal is in Kshs (In words) Kshs. (In figures) This amount is inclusive of all taxes levied in Kenya or in other countries, which shall be identified during negotiations and shall be added to the contract price.

b) Our Financial Proposal shall be binding upon us subject to the modifications resulting from Contract negotiations, up to expiration of the validity period of the Proposal, i.e. Proposals must remain valid for 120 days after the submission date as indicated in the instructions to consultants.

c) No commissions and gratuities paid or to be paid by us to agents relating to this Proposal and Contract execution, if we are awarded the Contract, are allowed in our price proposal.

d) We understand you are not bound to accept any Proposal you receive.

Yours Sincerely,
Authorized Signature———————————————————

Name of Consultant ———————————————————

Address———————————————————

Contact Phone———————————————————

Contact e-mail address) ———————————————————

STAMP OR SEAL _____

2.2. BREAKDOWN OF CONTRACT PRICE

(All costs shall be inclusive of all taxes, insurances, overheads, and profit).

No.	Description	Quantity	Amount in Kshs. inclusive of applicable taxes. Financial breakdown
i.	Terms of Reference (TOR) for Procurement of Customer Experience Strategic Plan Development	**1**	

Signed ..... (Consultant)……

Date .....

Stamp/Seal ……..

3.0 SECTION V -TERMS OF REFERENCE

Terms of Reference (TOR) for the development of CPF Customer Experience Strategic Plan.

SCOPE: DEVELOPMENT OF CUSTOMER EXPERIENCE STRATEGIC PLAN

1.0 Purpose

CPF Group seeks to develop a Customer Experience (CX) Strategic Plan. The process will gather, analyze, and consolidate insights from stakeholders to drive customer-centric improvements and align with the Corporate Strategic Plan. This initiative is expected to provide a shared direction to achieve key strategic priorities, strengthen customer engagement, standardize service delivery, and guide implementation over the strategic period.

2.0 Scope of Work:

1. Current State Assessment
    a) Evaluate internal and external customer experience using existing documentation, surveys, and feedback.
    b) Conduct a detailed review of operations, services, organizational structure, service standards, performance metrics, and digital touchpoints (e.g., CRM, online portals, self-service channels).
    c) Benchmark against industry best practices to identify gaps and improvement opportunities.
2. Stakeholder, Employee Engagement and Customer Engagement
    a) Facilitate consultations, interviews, and workshops with key stakeholders, selected customer segments, Board, Management and staff to gather insights and expectations.
    b) Assess employee experience, internal processes and service culture to support a customer-centric organization.
3. Customer Segmentation & Personas
    a) Identify key customer segments and develop personas to guide targeted CX initiatives.
    b) Conduct end-to-end customer journey mapping to identify key touchpoints, pain points, risks and service improvement opportunities.
4. CX Strategic Plan Development
    a) Develop a 3-year CX Strategic Plan aligned with CPF Corporate Strategic Plan.
    b) Define CX vision, strategic objectives, governance framework and expected outcomes.
    c) Include strategies, actionable initiatives, resource allocation, timelines, responsible parties, and quick wins for immediate impact.
5. Performance Measurement & Monitoring

a) Establish KPIs, dashboards, and reporting mechanisms to track progress and measure success.
b) Provide recommendations to embed CX excellence and sustain a customer-centric culture.

6. Change Management & Communication
   a) Identify potential risks and barriers to implementation.
   b) Outline strategies for change management and stakeholder communication to ensure alignment and adoption.
7. Validation & Presentations
   - Present draft and final versions of the CX Strategic Plan to management and the Board for review, feedback, and approval.

3.0 Required Methodology

The development of the Customer Experience (CX) Strategic Plan for CPF must describe in succinct terms the methodologies to complete the process including:

- The approach, partnership and involvement of key stakeholders in the customer experience excellence strategic planning process.
- The methodology planned for data and information gathering for comprehensive reviews and analysis.
- The proposed customer experiences strategic plan development process in a step-by-step format.
- The specific work plan including a description of the different planned activities, process, key milestones, timetable for completion specific sections.
- The resource persons to be involved in project and their requisite experiences in the area of customer experience excellence strategic planning and implementation.
- The expectations, support and assistance required from CPF for the project success.
- Include other activities deemed necessary by the consultant and specified within the work plan.

4.0 Expected Deliverables

The engagement is expected to result in the submission of the following outputs:

- Current State Assessment Report
- Customer Segmentation, Personas, and Journey Maps
- CX Vision and Strategic Framework
- Three-Year CX Strategic Plan and Implementation Roadmap
- CX Governance and Operating Model Framework
- Performance Measurement and Monitoring Framework (including KPIs)
- Customer Satisfaction Index Framework
- Voice of the Customer (VoC) Framework

- Change Management and Communication Plan
- CX Culture and Capability Development Plan, including CX training and awareness program for Board, Management, and Staff
- Draft and Final CX Strategic Plan Reports

5.0 Expected Timeline

8 weeks

3.1. IMPROVEMENTS TO TORs

The agency may offer suggestions and improvements to the Terms of Reference that would result in better implementation of the assignment. Such proposals if accepted will form part of the Terms of Reference of the proposals submitted by the agency.

4.0 SECTION VI: FORM OF CONTRACT

4.1. CONTRACT AGREEMENT FORM

THIS AGREEMENT made this……day of……26…. BETWEEN CPF Financial Services Ltd, a retirement benefits fund licensed by Retirement Benefits Authority situated at CPF House, 7th Floor Along Haile Selassie Avenue P.O. Box 28938-00200, Nairobi, Kenya aforesaid (hereinafter referred to as the "Scheme") of the one part,

AND

…… a duly registered entity according to the laws of .....and of Post

Office Box Number…… in the Republic aforesaid, (hereinafter referred to as the

"Consultant" of the other part.

WHEREAS Scheme invited tenders for certain services, that is to say, for Consultancy Services under

Tender Number…….

AND WHEREAS Scheme has accepted the Tender by the Consultant for the services in the sum of Kshs……. VAT Inclusive say……. (Hereinafter called "the Contract Price") as outlined in the notification of award letter referred to in clause 5(g).

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 and the Tender Document.

2. Unless the context or express provision otherwise requires:

a) reference to "this Agreement" includes its recitals, any schedules and documents mentioned hereunder and any reference to this Agreement or to any other document includes a reference to the other document as varied supplemented and or replaced in any manner from time to time.

b) any reference to any Act shall include any statutory extension, amendment, modification, re-amendment or replacement of such Act and any rule, regulation or order made thereunder.

c) words importing the masculine gender only, include the feminine gender or (as the case may be) the neutral gender.

d) words importing the singular number only include the plural number and vice-versa and where there are two or more persons included in the expression the "Consultant" the covenants, agreements obligations expressed to be made or performed by the Consultant shall be deemed to be made or performed by such persons jointly and severally.

e) where there are two or more persons included in the expression the "Consultant" any act default or omission by the Consultant shall be deemed to be an act default or omission by any one or more of such persons.

3. In consideration of the payment to be made by Scheme to the Consultant as hereinbefore mentioned, the Consultant hereby covenants with Scheme to perform and provide the services and remedy any defects thereon in conformity in all respects with the provisions of the Contract.

4. Scheme hereby covenants to pay the Consultant in consideration of the proper performance and provision of the services 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.

5. The following documents shall constitute the Contract between CPF and the Consultant and each shall be read and construed as an integral part of the Contract: -

(a) this Contract Agreement

(b) the Special Conditions of Contract as per the Tender Document c. the General Conditions

of Contract as per the Tender Document

(c) the Price Schedules/ Financial Proposal submitted by the Consultant and agreed upon with Scheme.

(d) the Terms of Reference as per Scheme's Tender Document

(e) the Consultant's obligations t Scheme

(f) Scheme Notification of Award dated ……

(g) the technical submission forms.

(h) Proposed work plan and schedule of activities

6. In the event of any ambiguity or conflict between the contract documents listed above, the order of precedence shall be the order in which the contract documents are listed in 5 above except where otherwise mutually agreed in writing.
7. The Commencement Date shall be the working day immediately following the fulfillment of all the following: -

a) Execution of this Contract Agreement by Scheme and the Consultant.

b) Issuance of the Performance Bond by the Consultant and confirmation of its authenticity by Scheme.

c) Issuance of the Official Order by Scheme to the Consultant.

The period of contract validity shall begin from the Commencement date and end sixty

4.2. FORM 6: CERTIFICATE OF INDEPENDENT TENDER DETERMINATION

Name of Procuring Entity……

Name and Number of Tender……

in response to the request for tenders made by **[Name of Tenderer]**, do hereby make the following statements, which I certify to be true and complete in every respect:

I certify, on behalf of **[Name of Tenderer]**, that:

1. I have read and understand the contents of this Certificate.
2. I understand that the Tender will be disqualified if this Certificate is found not to be true and complete in every respect.
3. I am the authorized representative of the Tenderer with authority to sign this Certificate and to submit the Tender on behalf of the Tenderer.
4. For the purposes of this Certificate and the Tender, I understand that the word "competitor" shall include any individual or organization, other than the Tenderer, whether or not affiliated with the Tenderer, who:

   a) Has been requested to submit a Tender in response to this request for tenders;

   b) Could potentially submit a Tender in response to this request for tenders, based on their qualifications, abilities, or experience.

5. The Tenderer discloses that (check one of the following, as applicable):

   ☐ (a) The Tenderer has arrived at the Tender independently from, and without consultation, communication, agreement, or arrangement with any competitor.

   ☐ (b) The Tenderer has entered into consultations, communications, agreements, or arrangements with one or more competitors regarding this request for tenders, and the Tenderer discloses, in the attached document(s), complete details thereof, including the names of the competitors and the nature of, and reasons for, such consultations, communications, agreements, or arrangements.

6. In particular, without limiting the generality of paragraphs 5(a) or 5(b) above, there has been no consultation, communication, agreement, or arrangement with any competitor regarding:

   a) Prices;

   b) Methods, factors, or formulas used to calculate prices;

c) The intention or decision to submit, or not to submit, a Tender; or

d) The submission of a Tender which does not meet the specifications of the request for Tenders;

except as specifically disclosed pursuant to paragraph 5(b) above.

7. In addition, there has been no consultation, communication, agreement, or arrangement with any competitor regarding the quality, quantity, specifications, or delivery particulars of the works or services to which this request for tenders relates, except as specifically authorized by the Procuring Entity or as specifically disclosed pursuant to paragraph 5(b) above.
8. The terms of the Tender have not been, and will not be, knowingly disclosed by the Tenderer, directly or indirectly, to any competitor prior to the date and time of the official tender opening or of the awarding of the Contract, whichever comes first, unless otherwise required by law or as specifically disclosed pursuant to paragraph 5(b) above.

Name: _____

Title: _____

Signature: _____

Date: _____

Official Stamp of the Tenderer:

(Stamp Here)

4.3. FORM 7: SELF-DECLARATION ON DEBARMENT-

FORM SD SELF DECLARATION THAT THE PERSON/TENDERER IS NOT DEBARRED IN THE MATTER OF THE PUBLIC PROCUREMENT AND ASSET DISPOSAL ACT 2015.

I, _____ of Post Office Box _____, being a resident of _____ in the Republic of _____, do hereby make a statement as follows:

1. THAT I am the Company Secretary / Chief Executive Officer / Managing Director / Principal Officer / Director of _____ (Insert name of the Company), who is a Bidder in respect of Tender No. _____ for _____ (Insert Tender Title/Description) for _____ (Insert name of the Procuring Entity) and that I am duly authorized and competent to make this statement.
2. THAT the aforesaid Bidder, its directors, and subcontractors have NOT been debarred from participating in procurement proceedings under Part IV of the Public Procurement and Asset Disposal Act, 2015.
3. THAT what is deponed to herein above is true to the best of my knowledge, information, and belief.

Signed by:

Name: _____

Title: _____

Signature: _____

Date: _____

Official Stamp of the Bidder:

(Stamp Here)

Commissioner for Oaths (If Required)

Signed and sworn to at _____ this _____ day of _____ 20_____

Before me: Commissioner for Oaths

Signature & Official Stamp