



**JARAMOGI OGINGA ODINGA UNIVERSITY OF SCIENCE AND TECHNOLOGY  
STAFF RETIREMENT BENEFIT SCHEME**

**REQUEST FOR QUOTATION**

**Quotation Description: Trust Fund Services**

**Quotation No: JOOUST/SRB/TFS/001/10/2020**

**Date issued: 13/10/2020**

Staff Retirement Benefit Scheme of Jaramogi Oginga Odinga University of Science & Technology is interested in establishing a Trust Fund for its Members Beneficiaries. Interested Service Providers are required to submit their signed priced proposal on email: [pension@jooust.ac.ke](mailto:pension@jooust.ac.ke) on or before 21<sup>st</sup> October 2020 at 5.00 p.m.

The Respondent shall be required to submit the following information in their proposal:

**1. PRELIMINARY EVALUATION**

- a) Company Profile
- b) Certificate of Registration
- c) PIN Certificate
- d) TAX Compliance Certificate (attach copy)
- e) 2 Years Audited Accounts (copies)
- f) Proof of registration with relevant professional / Regulatory Body
- g) Professional Practicing Certificates (Where applicable)

**2. TECHNICAL EVALUATION**

- 2.1 Profile of the Organization
- 2.2 Human Capital
  - a) CVs of all the Technical Staff
  - b) CVs of key staff proposed to do the assignment
- 2.3 Scope of Services
  - a) Description of services
  - b) Work plan and Methodology
- 2.4 Risk Management
  - a) Professional Indemnity Minimum 200 Million
  - b) Internal Controls

- 2.5 Client Base
  - a) Client listing for similar services offered,
- 2.6 ICT and Related Resources
  - a) Firm should demonstrate experience in use of ICT to enhance delivery
  - a) ICT Back up facilities
  - b) Physical Offsite Location
- 3. FINANCIAL EVALUATION**
  - a) Professional fees and Basis
  - b) Billing structure and Applicable Taxes
  - c) Disbursements if applicable

The Respondent can seek clarification from the under signed:

Pension Secretary

Email: [pension@jooust.ac.ke](mailto:pension@jooust.ac.ke)

Telephone: 057-2058000

P. O. Box 210-40601, Bondo

**Prof Monica A. Ayieko (The Pensions Scheme Chairperson)**

