



# **WINAS D.T SACCO SOCIETY LTD**

**P.O. Box 696 Embu, Kenya**

**Tel: 0709506000,**

**Email: [info@winassacco.com](mailto:info@winassacco.com)**

**[www.winassacco.com](http://www.winassacco.com)**

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**WSL/PREQ/2025.**

**PREQUALIFICATION OF SUPPLIERS  
FOR THE  
PROVISION OF GOODS AND SERVICES  
&  
REQUEST FOR PROPOSAL – CORE BANKING SYSTEM  
IMPLEMENTATION PROJECT MANAGEMENT.**

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**CLOSING DATE: 12th SEPTEMBER 2025  
AT 4.00 PM.**

SERIAL NO.....

CATEGORY NO. ....

# Table of Contents

	Page
1. TENDER NOTICE	1
2. PRE-QUALIFICATION INSTRUCTIONS	2-3
3. BRIEF CONTRACT REGULATIONS	4
4. PRE-QUALIFICATION DATA INSTRUCTIONS	5-6
5. FORM PQ - 1 PREQUALIFICATION DATA	7-8
6. FORM PQ - 2 CONFIDENTIAL BUSINESS QUESTIONNAIRE	9
7. FORM PQ - 3 SUPERVISORY PERSONNEL	10
8. FORM PQ - 4 PAST EXPERIENCE	11
9. FORM PQ - 5 SWORN STATEMENT	12
10. FORM PQ - 6 STAFF COMPOSITION	13
11. FORM PQ - 7 CURRICULUM VITAE FORMAT	14-15
12. FORM PQ - 8 FIRM'S REFERENCES	16
13. FORM PQ - 9 LITIGATION HISTORY FORM	17
14. MANDATORY REQUIREMENTS	18
15. TERMS OF REFERENCE(TOR)	22
16. REQUEST FOR PROPOSAL	24

# Tender Notice

Date: FRIDAY, 5<sup>th</sup> September 2025,

Reference: WSL/PREQ/2025.

Tender name: **PRE-QUALIFICATION OF SUPPLIERS FOR PROVISION OF CORE BANKING IMPLEMENTATION PROJECT MANAGEMENT SERVICES.**

Winas Sacco Society Ltd invites applications from interested, eligible and capable firms for prequalification/registration as suppliers/providers of goods and services for the years 2025-2026 in the following category:-

CATEGORY NO.	ITEM DESCRIPTION
WSL/PREQ/2025	Supply of Core banking System implementation project Management services.

**“TENDER NO.WSL/ PREQ/2025 FOR PRE-QUALIFICATION/REGISTRATION DOCUMENTS FOR SUPPLIERS FOR SUPPLY/PROVISION OF GOODS AND SERVICES”**

Category No. ....

Item Description .....

Addressed to:

**The Chief Executive Officer,  
Winas Sacco Society Ltd  
P. O. Box 696-60100,  
Embu, Kenya**

All bids delivered/submitted should be placed in the tender box situated in the banking hall at Winas Plaza building or sent via post to the above address so as to be received on or before, 12th September 2025 at 4.00 Pm or alternatively shared via mail captured on the (procurement@winassacco.com).

## **PRE-QUALIFICATION**

### **INSTRUCTIONS 1.1 Introduction**

Winas Sacco Society Ltd would like to invite qualified and interested candidates who meet the set criteria as provided for in this Tender Document and eligible to perform the contract of supply and delivery or provision of goods and services.

### **1.2 Pre-qualification Objective**

- The main objective is to supply and deliver assorted items and also provide services under relevant tenders/quotations/proposals to the Winas Sacco Society Ltd on 'as and when required' during the Years 2025-2026.
- Bids will be submitted in complete lots singly or in combination; and in some categories, suppliers will be contracted to supply or provide the goods/services for a period of twelve (12No.) months

### **1.3 Invitation of Pre-qualification**

Suppliers registered under the Laws of Kenya to supply or provide respective goods/services are invited to submit their PRE-QUALIFICATION documents to the above address stated in the Tender Notice so that they can be pre-qualified for submission of quotations/proposals. The prospective Suppliers are required to provide all the mandatory information needed for the pre-qualification Process.

### **1.4 Experience**

Potential suppliers/contractors must demonstrate the capacity, willingness and commitment to meet the pre-qualification criteria.

### **1.5 Pre-qualification Document**

This document includes questionnaire forms and documents required of prospective suppliers.

### **1.6** In order to be considered for pre-qualification, prospective suppliers must submit all the information requested herein.

**1.7 Submission of Pre-qualification Documents**

All submitted bids should be inclusive of an Original copy and one (1) copy of the completed pre-qualification data and other requested information and should be addressed to:

**The Chief Executive Officer,  
Winas Sacco Society Ltd  
P. O. Box 696,  
Embu, Kenya  
Tel :0709506000  
Email: *procurement @winassacco.com***

**1.8 Questions Arising from Documents**

Questions that may arise from the pre-qualification documents should be directed to the following email address: ***procurement@winassacco.com***

**1.9 Additional Information**

The Sacco reserves the right to request for submission of additional information from prospective bidders.

## **2. BRIEF CONTRACT REGULATIONS/GUIDELINES**

### **2.1 Taxes on Imported Materials**

The Supplier will have to pay all taxes payable as applicable for all imported materials to be supplied.

### **2.2 Customs Clearance**

The contractors shall be responsible for custom clearance of their imported goods and materials.

### **2.3 Contract Price**

The contract shall be of unit price or cumulative of computed unit price and quantities required. Prices quoted must be inclusive of all delivery charges and taxes and in Kenya Shillings currency.

### **2.4 Payments**

All local purchase shall be on credit of a minimum of thirty (30) days or as may be stipulated in the Contract Agreement.

### **3. PRE-QUALIFICATION DATA INSTRUCTIONS**

#### **3.1 Pre-qualification data forms**

The attached questionnaire forms PQ-1, PQ-2, PQ-3, PQ-4, PQ-5, PQ-6, PQ-7, PQ-8, PQ-9 are to be completed by prospective suppliers/contractors who wish to be pre-qualified for submission of tender for the specific tender.

- 3.1.1** The pre-qualified application forms which are not filled out completely and submitted in the prescribed manner will not be considered. All the documents that form part of the proposal must be written in English.

#### **3.2 Qualification**

- 3.2.1** It is understood and agreed that the pre-qualification data on prospective bidders is to be used by the Sacco in determining, according to its sole judgment and discretion, the qualifications of prospective bidders to perform in respect to the Tender Category as described.
- 3.2.2** Prospective bidders will not be considered qualified unless in the judgment of the Sacco they possess the capability, experience, qualified personnel available and suitability of equipment and net current assets or working capital sufficient to satisfactorily execute the contract for goods/services.

#### **3.3 Essential Criteria for Pre-qualification**

- 3.3.1** (a) Experience: Prospective bidders shall have experience in the supply and provision of goods, services and allied items and hence should show competence, willingness and capacity to execute the contract.
- (b) The Prospective supplier requires special experience and capability to organize for the supply and delivery of goods or services at short notice.

#### **3.3.2 Personnel**

The names and pertinent information and CV of the key personnel for individual or group to execute the contract must be indicated in form PQ-3.

#### **3.3.3 Financial Condition**

The Supplier's financial condition will be determined by latest financial statement submitted with the prequalification documents as well as letters of reference from their bankers regarding the supplier's/contractor's credit position. Potential suppliers/contractors will be pre-qualified upon satisfactory information given.

- 3.3.4** Special consideration will be given to the financial resources available as working capital, taking into account the amount of uncompleted orders on contract and now in progress. However, potential bidders should provide evidence of financial capability to execute the contract(s).

#### **3.3.5 Past Performance**

Past performance will be given due consideration in pre-qualifying bidders. Letter of reference from past customers/clients should be included in Form PQ-4

**3.4 Statement**

Application must include a sworn statement Form PQ-5 by the Tenderer ensuring the accuracy of the information given.

**3.5 Withdrawal of Prequalification**

Should a condition arise between the time the firm is pre-qualified to bid and the bid opening date which in the opinion of the Sacco could substantially change the performance and qualification of the bidder or his ability to perform such as but not limited to bankruptcy, change in ownership or new commitments, the Sacco reserves the right to reject the tender from such a bidder even though he was initially pre-qualified.

**3.6** The firm(s) must have a fixed Business Premise and must be registered in Kenya, with certificate(s) of registration/ incorporation and copies attached.

**3.6.1** The firm must show proof that it has paid all its statutory obligations and have a valid Tax compliance Certificate

**FORM PQ-1      PRE-QUALIFICATION DATA****REGISTRATION OF SUPPLIERS APPLICATION FORM**

1/we ..... hereby apply for registration as  
 supplier(s)  
 (Name of Company/Firm)

of .....  
 (Item Description)

.....  
 (Category No.)

Post Office Address .....

Town .....

Street .....

Name of building .....

Room/Office No. .... Floor No. ....

Telephone Nos. .... Fax.....email .....

Full Name of applicant .....

Other branches location .....

2.      Organization & Business Information

Chief Executive/Managing Director .....

Marketing/Sales Manager .....

Accountant .....

Secretary .....

Other .....

7

Partnership (if applicable)

Names of Partners.....

3. Business founded or incorporated .....
4. Under present management since .....
5. Net worth equivalent Kshs. ....
6. Bank reference and address .....  
.....
7. Sister company reference and address .....
8. Enclose copy of organization chart of the firm indicating the main fields of activities  
.....
9. State any technological innovations or specific attributes which distinguish you  
from your competitors .....  
.....  
.....
10. Indicate terms of trade/sale

**FORM PQ-2**

**WINAS SACCO SOCIETY LTD**  
**CONFIDENTIAL BUSINESS QUESTIONNAIRE (S33)**

You are requested to give the particulars indicated in Part I and either Part 2 (a), 2 (b) or 2 (c) whichever applies to your type of business.

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

*Part I- General :*

Business Name .....

Location of business premises.....

Plot No. .... Street/Road.....

Postal Address.....Tel. No.....

Nature of business.....

Current Trade License No.....Expiring date.....

Maximum value of business which you can handle at any one time : Kshs.....

Name of your bankers.....Branch .....

☐
*Part 2 (a) – Sole Proprietor*

Your name in full.....Age.....

Nationality.....Country of origin.....

\*Citizenship details.....

☐
*Part 2 (b) Partnership*

Given details of partners as follows:

<i>Name</i>	<i>Nationality</i>	<i>Citizenship Details</i>	<i>Shares</i>
.....	.....	.....	.....
.....	.....	.....	.....
.....	.....	.....	.....

☐
*Part 2 ( c) – Registered Company:*

Private or Public.....

State the nominal and issued capital of company-

Nominal Kshs.....

Issued Kshs.....

Given details of all directors as follows:-

	<i>Name</i>	<i>Nationality</i>	<i>Citizenship Details</i>	<i>Shares</i>
1.	.....	.....	.....	.....
2.	.....	.....	.....	.....
3.	.....	.....	.....	.....
4.	.....	.....	.....	.....

\*if Kenya Citizen, indicate under “Citizenship Details” whether by Birth, Naturalization or Registration.

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

**FORM PQ-3****SUPERVISORY PERSONNEL**

Name .....

Age .....

Academic Qualification .....

.....

Professional Qualification .....

.....

Length of service with Contractor or Supplier position held .....

.....

(Attach copies of certificates/CV of key personnel in the organization)

**FORM PQ-4 - PAST EXPERIENCE****NAMES OF THE APPLICANTS CLIENTS IN THE LAST  
TWO YEARS AND VALUES OF CONTRACT/ORDERS****1. Name of 1<sup>st</sup> Client (Organization)**

- i) Name of Client (organization) .....
- ii) Address of Client (organization) .....
- iii) Name of Contact Person at the client (organization) .....
- iv) Telephone No. of Client .....
- v) Value of Contract .....
- vi) Duration of Contract (date) .....  
(Attach documental evidence of existence of contract)

**2. Name of 2<sup>nd</sup> Client (organization)**

- i) Name of Client (organization) .....
- ii) Address of Client (organization) .....
- iii) Name of Contact Person at the client (organization) .....
- iv) Telephone No. of Client .....
- v) Value of Contract .....
- vi) Duration of Contract (date) .....  
(Attach documental evidence of existence of contract)

**3. Name of 3<sup>rd</sup> Client (organization)**

- i) Name of Client (organization) .....
- ii) Address of Client (organization) .....
- iii) Name of Contact Person at the client (organization) .....
- iv) Telephone No. of Client .....
- v) Value of Contract .....
- vi) Duration of Contract (date) .....  
(Attach documental evidence of existence of contract)

**4. Others .....**

**FORM PQ-5 - SWORN STATEMENT**

Having studied the pre-qualification information for the above project we/I hereby state:

- a. The information furnished in our application is accurate to the best of our knowledge.
- b. That in case of being pre-qualified, we acknowledge that this grants us the right to participate in due time in the submission of a tender or quotation on the basis of provisions in the tender or quotation documents to follow.
- c. We will not engage in corrupt practices with the Sacco Members of Staff.
- d. We have not been debarred from participating in Public Procurement Proceedings.
- e. When our legal, technical or financial conditions or the contractual capacity of the firm changes, we will volunteer all information pertaining the change of status and acknowledge your right to review the pre-qualification made.
- f. We have enclosed all the required documents and information for the pre-qualification evaluation.

**Date .....**

**Applicant's Name .....**

**Represented by .....**

**Signature .....**

**(Full name and designation of the person signing and Company's stamp or seal)**

**FORM PQ-6      STAFF COMPOSITION****(i)      Directors / Partners**

Name	Position	Specialization and qualification

**(ii)      Technical / Management Staff**

Name	Position	Specialization and qualification

**(iii)      Support Staff**

Name	Position	Specialization and qualification

**FORM PQ-7 - FORMAT OF CURRICULUM VITAE (CV)  
FOR PROPOSED PROFESSIONAL STAFF**

Proposed Position:

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Name of Firm:

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Name of Staff:

---

Profession:

---

Date of Birth:

---

Years with Firm: \_\_\_\_\_ Nationality: \_\_\_\_\_

Membership in Professional Societies:

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Detailed Tasks Assigned:

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Key Qualifications:

*[Give an outline of staff member's experience and training most pertinent to tasks on assignment. Describe degree of responsibility held by staff member on relevant previous assignments and give dates and locations].*

---

Education:

*[Summarize college/university and other specialized education of staff member, giving names of schools, dates attended and degree[s] obtained.]*

Employment Record:

*[Starting with present position, list in reverse order every employment held. List all positions held by staff member since graduation, giving dates, names of employing organizations, titles of positions held, and locations of assignments.]*

**Certification:**

I, the undersigned, certify that these data correctly describe me,  
my qualifications, and my experience.

*Name of staff member:* \_\_\_\_\_

*Signature of staff member* \_\_\_\_\_ *Date:* \_\_\_\_\_

*Name of authorised representative of the firm* \_\_\_\_\_

*Signature of authorised representative* \_\_\_\_\_ *Date:* \_\_\_\_\_

**FORM PQ – 8 FIRM'S REFERENCES**

**Relevant Services Carried Out in the Last Three Years  
That Best Illustrate Qualifications**

Using the format below, provide information on each assignment for which your firm either individually, as a corporate entity or in association, was legally contracted.

Assignment Name:		Country
Location within Country:		Professional Staff provided by Your Firm/Entity(profiles):
Name of Client:		Clients contact person for the assignment.
Address:		No of Staff-Months; Duration of Assignment:
Start Date (Month/Year):	Completion Date (Month/Year):	Approx. Value of Services (Kshs)
Name of Associated Consultants. If any:		No of Months of Professional Staff provided by Associated Consultants:
Name of Senior Staff (Project Director/Coordinator, Team Leader) Involved and Functions Performed:		
Narrative Description of project:		
Description of Actual Services Provided by Your Staff:		

Firm's Name: \_\_\_\_\_

Name and title of signatory; \_\_\_\_\_

*(May be amended as necessary)*

Applicants, including each of the partners of a joint venture, should provide information of any history of litigation or arbitration resulting from contracts executed in the last five years or currently under execution. A separate sheet should be used for each partner of a joint venture.

[illegible]

## **Mandatory Requirements:**

- 1. Photostat copy of current registration/incorporation certificate.**
- 2. Copy of current Tax Compliance Certificate (TCC), PIN & VAT Certificates.**
- 3. Names of directors for prove of ownership/identity of the company or firm (CR12).**
- 4. Current Business permit license.**
- 5. Scope of work preferably;  
Work plan/Operations Plan/Work Schedule.**
- 6. Audited accounts for the last 2 years.**
- 7. Should be registered with relevant professional body**
- 8. Information regarding any current litigation in which the tenderer is involved.**
- 9. Completed Confidential Business Questionnaire**
- 10. Must attach CVs of the Management and Proposed Staffs  
Must Fill Forms PQ1, PQ2, PQ3, PQ4, PQ5, PQ6, PQ7, PQ8, PQ9  
signed and stamped**
- 12. Attach evidence of payment of the non-refundable fee.**
- 13. Any other information that the tenderer wishes to submit**



## **A. BACKGROUND.**

Winas DT- Sacco is a Sacco Society Regulatory Authority (SASRA) licensed modern and fast- growing financial institution in Kenya. Established in 1977 to serve teachers in larger Embu County. The society has rebranded and diversified its membership to effectively tap the economic potential in all viable sectors in Kenyan markets and beyond. Since inception the Sacco has undoubtedly witnessed exponential growth with membership growing tremendously to the level that we have now set our eyes further afield.

## **B. TERMS OF REFERENCE.**

Core Banking System (CBS) Implementation Project Management services.

### 1. Objectives of the Assignment

The primary objective is to provide expert guidance and support throughout the management, planning, implementation, testing, go-live stages of the CBS project. The consultant will ensure that the project is delivered on time, within budget, and to the required quality standards.

### 2. Scope of Work

The consultant will:

#### ***a) Project Planning and Governance***

- Assist in Develop a detailed project implementation plan.
- Assist in forming the CBS project team and defining roles and responsibilities.
- Establish governance structures (steering committee, working groups, etc.).

#### ***b) Manage Implementation and Oversight of the project.***

- Provide oversight during system design, customization, and configuration.
- Monitor progress against the project plan and timelines.
- Ensure alignment with regulatory and compliance requirements.

### *c) Testing and Quality Assurance*

- Guide the preparation of test plans (UAT, SIT, performance, etc.).
- Ensure proper execution and documentation of testing phases.
- Support issue resolution and defect management.

### *e) Training and Change Management*

- Advise on change management and training strategies.
- Support the development of training materials.
- Ensure adequate user training is conducted.

### *f) Go-live and Post-Implementation Support*

- Oversee data migration, cut-over, and go-live readiness.
- Provide support during go-live and immediate post-go-live stabilization.
- Conduct a post-implementation review and lessons-learned session.

## 3. Deliverables

The consultant will be expected to deliver the following:

1. Project implementation plan and roadmap.
2. Functional and technical CBS requirements.
3. Progress reports and project dashboards.
4. Test strategy and reports (SIT, UAT).
5. Training plan and change management strategy.
6. Go-live readiness report.
7. Post-implementation review report.

## 4. Duration and Location

- **Duration:** 4 months with possible extension based on project needs.
- **Location:** Primarily at Winas Sacco HQ-Embu Town, with occasional visits to branches as required.

## 5. Reporting and Supervision

The consultant will report to the **Project Steering Committee** or the **Chief Executive Officer (CEO)**. Regular updates will also be provided to the Board of directors.

## 6. Required Qualifications and Experience

- Minimum of 10 years' experience in core banking system implementation.
- Demonstrated experience with at least 2–3 successful CBS implementations.
- Strong understanding of Sacco operations, IT systems, and regulatory requirements.
- Project management certification (e.g., PMP, PRINCE2) is preferred.
- Excellent communication, stakeholder management, and problem-solving skills.

# WINAS D.T SACCO SOCIETY LIMITED

**FORM S.10  
(REVISED)**

TO  
MS  
LOCATION:  
LTD

Quotation  
Date: 05 SEPTEMBER 2025.

FROM:  
CHIEF EXECUTIVE OFFICER  
WINAS SACCO

PO BOX 696,

EMBU KENYA  
PO BOX

info@winassacco.com

Tel:

www.winassacco.com

**You are invited to submit quotation/proposal on CORE BANKING SYSTEM  
IMPLIMENTATION PROJECT MANAGEMNT: Notes;**

- a) **THIS IS NOT an ORDER.** Read the conditions and instructions on reverse before quoting
- b) This quotation should be submitted in a plain wax sealed envelope marked
- c) Your quotation should indicate final unit price inclusive of all costs for delivery, discount, VAT, duty and sales tax
- d) Return the original copy and retain the duplicate for your records

For supply of above indicated service quotations/proposal should reach the Winas Sacco Ltd. Via email: [procurement@winassacco.com](mailto:procurement@winassacco.com) or be placed in the quotation/tender box in WINAS SACCO LTD. HEADOFFICE, EMBU, KENYATTA H/WAY NEXT TO NSSF/SHIF,SO AS TO BE RECEIVED ON OR BEFORE **12th SEPTEMBER, 2025 AT 4.00pm.**

CODE NO	ITEM DESCRIPTION	UNITS	QUANTITY	UNIT PRICE	TOTAL PRICE	DAYS TO DELIVERY	REMARKS
001.	<b>Provision of Core Banking System Implementation project management services.</b> <u>See Attached terms of reference.</u>	-	-				

- NB:**
1. Attach VAT/PIN certificate, Registration certificate, current business permit and Current Tax compliance certificate.
  2. Fill S33 Fully, Sign and Stamp.
  3. Attach your quotation where it's not possible to fill Form S.10 (Revised)
  4. Clearly indicate the terms of payment.

**Sellers signature..... Date.....**

**FOR OFFICIAL USE ONLY**

Opened by:

1. .... Designation..... Signature.....
2. .... Designation..... Signature.....
3. .... Designation..... Signature.....

Date ..... Time.....

## **CONDITIONS**

1. The General Conditions of Contract with the WINAS SACCO LTD apply to this transaction Form properly submitted constitutes the entire agreement.
2. The offer shall remain firm for 60 days from the closing date unless otherwise stipulated by the seller
3. The buyer shall not be bound to accept the lowest or any other offer, and reserve the right to accept any offer in part unless the contrary is stipulated by the seller
4. Samples of offers when required will be provided free, and if not destroyed during tests, will upon request, be returned at the sellers expenses.

## **INSTRUCTIONS**

1. All entries must be typed or written in ink. Mistakes must not be erased but should be crossed out and corrections be made and initialed by the person signing the quotation.
2. Quote on each item separately, and in units as specified.
3. This form must be signed by a competent person and preferably it should also be rubber stamped.
4. Each quotation should be submitted separately in sealed envelope with the quotation Number endorsed on the outside. Descriptive literature or samples of the items offered may be forwarded with quotation.
5. If you do not wish to quote, please endorse the reason on this form and return it, otherwise your name may be deleted from the buyer's mailing list for the items listed hereon.