



## REQUEST FOR PROPOSALS

Consultancy Services to Develop KENRED Sacco Strategic Plan for the  
Period 2024-2028

Document Release Date: 19<sup>th</sup> April, 2024

Last Date for Receipt of proposals: 10<sup>th</sup> May, 2024

Time: 11.00Hrs

Tender Number: KRS2024-001

Submission Method Email to: [kenred@redcross.or.ke](mailto:kenred@redcross.or.ke)

Tender Opening Venue and Time: Microsoft Teams at 1200 HRS

## 1. Background Information

KENRED Sacco was established and registered in 1985 and has been in operation for years, with a current membership of over 380 members. The SACCO is registered under the co-operative Act Cap 490. The Sacco draws its membership from the Kenya Red Cross Society, and its affiliates organization staff members. The Sacco is currently regulated by the Sacco Society Regulatory Authority (SASRA).

The Sacco was being run by staff of Kenya Red Cross Society from its inception until November 2011, when the Board hired a full-time staff. Currently, the Sacco has two dedicated full-time staff, assisting the board in running the affairs of the Sacco.

The move to have full-time employees dedicated to Sacco was to enable the Society to serve its members efficiently and meet its core objective of empowering and promoting the welfare and economic interests of its members.

KENRED Sacco is looking for a consultant who will work closely with the Sacco Management team to facilitate the process of developing Sacco's strategic framework and identifying new and ambitious goals and objectives for the period 2024-2028. This assignment will involve close engagement with the internal Sacco Strategic Planning Team (comprising of the Board and Sacco staff as well as, where possible, Sacco members and it will entail a participatory process, including, but not limited to:

- i. A review of internal documents and benchmark with similar institutions/ organizations
- ii. Consultations with KENRED Sacco staff and selected partners/stakeholders to review the current workplan and set priorities for the next plan
- iii. Facilitation of a strategic planning workshop for staff, board members and selected stakeholders to further build on the Strategic Plan
- iv. Drawing up a Strategic Plan and incorporating input from the Sacco staff, Board and selected stakeholders and partners.
- v. Developing implementation plan and Monitoring and Evaluation Framework

## 2. Objectives

The main objective of this consultancy is to develop a new strategic framework for KENRED Sacco that takes into account the current internal and external operating environment to enhance Sacco's effectiveness and sustainability in the area of Financial Services provision to its members.

**Specific Objectives of the Survey are:**

To establish and build on Sacco's achievements since its establishment and be cognizant of its ever-changing operating environment, the consultant will review and guide Sacco in clearly defining: -

- i. The Vision, Mission, Core Values, strategic areas, and objectives, including priority focus areas for the strategic period
- ii. The situational context, through a SWOT, PESTEL and other relevant analysis.
- iii. Sustainability plan, including proposals for effective financial and Human resource strategies
- iv. The stakeholder map and identify relevant strategies to engage them to advance our stated objectives, stakeholder
- v. Monitoring and reporting framework and implementation plan to enable effective tracking of the strategic plan
- vi. Costing of the plan.

## 3. Scope and Methodology

The scope and focus of the assignment is to provide technical, strategic, and facilitation support to enable the development of Sacco's strategic framework. While the consultant is at liberty to propose

his/her methodology that would adequately result in the expected deliverables outlined in this ToR, the following four steps are suggested as a basis for the strategic plan development process.

#### **Step One: Prepare**

- i. Inception workshop with the Sacco team to discuss scope, methodology and timeline;
- ii. Inception report outlining the key steps/methodology with specific deliverables and timeline; contextual analysis.

#### **Step Two: Review, Assess and Analyse**

- i. Participatory process of critical reflection, analysis and consultation (SWOT/PESTEL analysis);
- ii. Review of relevant organizational documents (vision, mission statement, theory of change, Business Plan, etc.).
- iii. Interviews with the Sacco team; - assessment report outlining critical issues, contextual analysis, gaps to be addressed and opportunities to grab.

#### **Step Three: Define Strategic Plan**

- i. Analyse feedback from the different sources (as outlined in step 2);
- ii. Formulate a strategic framework - guided by the following questions:
  - a. Where does KENRED Sacco want to be in 2028?
  - b. What does KENRED Sacco want to achieve during this timeline?
  - c. How would KENRED Sacco work to deliver its goals?
  - d. How will KENRED Sacco get there?
  - e. What might go wrong for KENRED Sacco in the dynamic business environment?
  - f. And how would KENRED Sacco avoid this?
  - g. How will KENRED Sacco know when we get there? (Measure of success)
  - h. How will KENRED Sacco monitor lessons learnt and integrate that learning into successive plans and strategies?

#### **Step Four: Agree: Finalizing, endorsing and disseminating the new strategic framework**

- i. Draft the text around the key objectives;
- ii. Consult widely on draft new strategic framework;
- iii. KENRED Sacco formally approves the final document;
- iv. Dissemination and implementation of the Strategic Plan.

## **4. Expected Deliverables**

- a) An inception report detailing the methodology/ approaches and timelines associated with this consultancy assignment
- b) A needs assessment report highlighting the current status and gaps in KENRED Sacco's strategic direction, covering both internal and external factors relevant to the organizational operating environment.
- c) A 2-day strategic planning workshop for the Sacco Staff, Board and selected partners
- d) A revised strategic plan incorporating all the feedback from the stakeholders.
- e) A final Strategic Plan document that is graphically designed
- f) A consultancy report that includes the major activities of the consultancy, the highlights of the strategic planning workshop and an evaluation of the workshop

## 5. Qualifications and Experience for Consultants

- The lead consultant must have a background in Economics, Strategic Planning, Public Policy, Development field or a related social science field. (At a minimum of Master's degree level)
- Demonstrable 5 years of experience in developing Strategic Planning for Saccos or related organizations (sample SPs will be required during the oral stage of bid analysis).
- High level of professionalism and an ability to work independently under tight deadlines.
- Strong interpersonal and communication skills
- The team must have technical capacities/team members experienced and able to cover the key thematic components of this assignment (Assessments, ICT sector, development of Strategic Plans for Sacco Sector agencies, and performance management systems etc.)
- The lead consultant must have strong analytical skills and the ability to synthesise clearly and present findings, draw practical conclusions, and make recommendations that arise from the SP development process.
- Availability for the period indicated.

## 6. Management of the evaluation

- **Duration:** The development of the SP is estimated to begin on 3<sup>rd</sup> June, 2024, and all deliverables be provided to the KENRED Sacco on but not later than 2<sup>nd</sup> July, 2024. These timelines may be reviewed at any time as needed and will be communicated by the Sacco.
- **Supervision:** This consultancy assignment will be supervised by KENRED Sacco Manager, with the support of the Strategic Planning Team.
- **Confidentiality of Information:** All documents and data collected during the consultancy process will be treated as confidential and used solely to facilitate the consultancy assignment. All information to which the consultant shall receive access shall at all times be treated as the property of KENRED SACCO and shall not be disclosed except where express permission has been granted as such.

## 7. Application Requirements

Application materials shall include:

- A written response to this TOR in terms of a proposal detailing the technical understanding of the task, proposed methodologies, expected activities and deliverables, proposed work plans with schedule, and financial bids using the provided template. **See Annex 1**
- Detailed CVs of all professional (s) who will work on the assignment. If there is more than one contractor on the proposed team, please attach a table describing the level of effort (in number of days) of each team member in each of the evaluation activities. **See Annex 3**
- Professional references: Please provide at least three references from your previous clients and full contact details of the referees (working and active email and phone number). The reference provided needs to be ready to be contacted if necessary. The reference letters should be signed off and indicate the details of the assignment done, when it was done, and give an overall assessment of the Consultant's performance and turnaround time.
- Provide at least 2 reports/profiles of SP developed for organization in the sector and context

- If you proceed to the oral stage, you will share a full SP that is similar to this assignment for technical assessment purposes.

Please also note that the people whose names appear in the team composition template **MUST** be the ones to undertake the assessment. As such, they **MUST** be the ones to appear in person if the proposal moves to the oral interview stage.

Failure to adhere to any of these requirements will lead to automatic disqualification or breach of contract if the work has begun.

KENRED Sacco reserves the right to cancel the contract if convinced that the consultant is in breach of the terms and conditions, including those approved in the inception report.

## 10. Submission of proposal

The Technical Proposal **MUST** be prepared in conformance to the outline provided in **Annex 1** while the financial proposal shall conform to the template provided in **Annex 2**. Team composition should conform to **Annex 3**

*Bidders should provide softcopy technical and financial proposal in **two separate folders** clearly marked “Technical Proposal + name of consultant” and “Financial Proposal + name of consultant”. The subject of your email should be “Tender No. KRS2024-001 - “Consultancy Services to Develop KENRED Sacco Strategic Plan for the Period 2024-2028.”*

The completed Document should be addressed to the undersigned.:

The Chairperson  
Kenred Sacco Ltd  
P.O Box 40712 – 00100  
Nairobi

The Proposal **MUST** be sent by mail to reach: [kenred@redcross.or.ke](mailto:kenred@redcross.or.ke) by 10<sup>th</sup> May, 2024 at 11:00 AM.

### ANNEX 1: RESPONSE PROPOSAL FORMAT

- 1) **Introduction:** description of the consultant, the consultant’s qualifications and **statutory compliance**
- 2) **Background:** Understanding of the assignment, context and requirements for services
- 3) **Proposed methodology** – Detailed methodology that is both practical and feasible for this assignment in the context, approaches to be employed, who to be targeted etc.
- 4) **Firms experience** in undertaking assignments of similar nature and experience from other major clients (Table with Name of organisation, name of the assignment, duration of the assignment (Dates), reference person contacts
- 5) **Proposed team** composition (As per annex 3)
- 6) **Work plan** (Gantt chart of activity and week of implementation)

**Note:** The Technical Proposal shall not include any financial information.

## ANNEX 2: BUDGET TEMPLATE (IN KES)

Item	Total Cost (Kshs.)
Consultancy Fees for developing the Strategic Plan 2024-2028	
Miscellaneous and other logistical expenses	
<b>Grand Total</b>	

## ANNEX 3: PROPOSED TEAM COMPOSITION TEMPLATE

Name of Team Member	Highest Level of Qualification	General Years of Experience related to the task at hand	Number of days to be engaged	Roles under this assignment

## ANNEX 4: TENDER EVALUATION CRITERIA

A two-stage evaluation procedure will be used to evaluate all proposals from bidders. The total number of points which each bidder may obtain for its proposal is:

- Mandatory stage – pass
- Technical Proposal            50 marks
- Oral Presentation            20 marks
- Financial Proposal            30 marks

### 1. Mandatory Requirements

The proposal shall be evaluated on the basis of its adherence to the following compulsory requirements. The documents required to proceed to the technical stage include:

Documents Required
Current Tax Compliance Certificate - valid
Certificate of incorporation/registration (Only applicable for firms)
KRA Pin Certificate
CR 12 (Only applicable for firms)
<b>Proceed to Next Stage (YES/NO)</b>

## 2. Evaluation of the Technical Proposal

The technical proposal shall be evaluated on the basis of its responsiveness to the TOR. Specifically, looking at the firm’s description and qualification, background information and understanding of the task, methodology, experience in handling similar assignment and the proposed team and their qualification. The proposed work plan will also count against the project’s timelines.

The total scores of the technical bid analysis shall be converted to a denominator of 50.

Evaluation Criteria	Maximum Points Possible	Bidders score	Remarks
<b>(1) Introduction:</b> <ul style="list-style-type: none"> <li>• Description of the Firm and the Firm’s Qualifications</li> </ul>	5		
<b>(2) Background:</b> Understanding of the project, context and requirements for services	5		
<b>(3) Proposed Methodology:</b> The proposed methodology MUST provide an indication of its effectiveness and added value in the proposed assignment.	15		
<b>(4) Firms Experience in undertaking assignments of similar nature and experience from related geographical area for other major clients</b> <ul style="list-style-type: none"> <li>• Provide a summary and supporting information on overall years of experience, and related technical and geographic coverage experience</li> </ul>	10		
<b>(5) Proposed Team Composition:</b> <ul style="list-style-type: none"> <li>• Tabulate the team composition to include the general qualifications, suitability for the specific task to be assigned and overall years of relevant experience to the proposed assignment.</li> <li>• The proposed team composition should balance effectively with the necessary skills and competencies required to undertake the proposed assignment.</li> </ul>	10		
<b>(6) Work Plan:</b> A Detailed logical, weekly work plan for the assignment MUST be provided.	5		
<b>TOTAL SCORE</b>	<b>50</b>		

Any firm with at least a score of 35 (70%) from the technical evaluation, will proceed and be invited for the second stage - oral presentation.

A third of firms will proceed to the orals stage of the evaluation

### 3. Oral presentation

Criteria	Score	Remarks
Understanding of the assignment	(5 Marks)	
Clear methodology	(10 Marks)	
<b>Presentation of</b> <ul style="list-style-type: none"> <li>• Two Samples reports of Previous works</li> </ul>	(5 marks)	
<b>Total</b>	<b>20 marks</b>	

For the firm to proceed to the last stage – financial proposal evaluation, the minimum score must be 49 marks (70%) of the combined technical proposal and the oral presentation.

### 4. Evaluation of the Financial Proposal

The Financial Proposal shall be prepared in accordance to Annex 2. The maximum number of points for the Financial Proposal shall be 30% (30 points). This maximum number of points will be allocated to the lowest Financial Proposal. All other Financial Proposals will receive points in inverse proportion according to the formula below:

Points for the Financial Proposal being evaluated =  

$$\frac{(\text{Maximum number of points for the financial proposal}) \times (\text{Lowest price})}{\text{Price of proposal being evaluated}}$$

The bid obtaining the overall highest consolidated score will be awarded or as recommended by the SP Development Planning Team based on other variables of interest.



## GENERAL INSTRUCTIONS

### 5. Introduction

KENRED Sacco will select a firm among those invited to submit a proposal in accordance with the method of selection detailed in this section. The consultants are invited to submit a Technical Proposal and a Financial Proposal for consulting services required for the assignment named. Please note that:

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

### 6. Preparation of Proposals

The Consultant's proposal shall be written in the English language.

### 7) Technical Proposal

In preparing the Technical Proposal, the consultant is expected to examine the documents constituting this RFP in detail. Material deficiencies in providing the information requested may result in the rejection of a proposal. The Technical Proposal shall provide the following information:

- i. Any comments or suggestions on the Terms of Reference outlined in this document, a list of services and facilities to be provided by the Client.
- ii. A description of the methodology and work plan for performing the assignment.
- iii. The list of the proposed staff team by speciality, the tasks that would be assigned to each staff team member and their timing.
- iv. Estimates of the total staff input (professional and support staff-time) needed to carry out the assignment.

Note: The Technical Proposal shall not include any financial information.