



**REQUEST FOR PROPOSAL (RFP) TENDER FOR CONSULTANCY SERVICES TO
UNDERTAKE DEVELOPMENT OF SAFARICOM SACCO STRATEGIC PLAN
FOR THE PERIOD 2024-2028**

TENDER NO: SS/RFP/001/2023

SECTION A: INVITATION TO TENDER

Safaricom Sacco invites sealed proposals from interested eligible firms to tender for consultancy services to undertake the development of the Institution's Strategic Plan for the period 2024 - 2028. The RFP tender document containing detailed information on the tender can be accessed and downloaded from Sacco's Website (www.safaricomsacco.com). Interested bidders must arrange to forward their particulars/contacts to Safaricom Sacco, through email address Saccocommittee@Safaricom.co.ke before the closing date for records and for the purposes of receiving clarifications and/or addendums, if any. Duly completed request for proposal documents, in a plain sealed envelope marked: **“SS/RFP/001/2023-REQUEST FOR PROPOSAL FOR CONSULTANCY SERVICES TO UNDERTAKE DEVELOPMENT OF SAFARICOM SACCO STRATEGIC PLAN FOR THE PERIOD 2024-2028”** should be mailed to the address below or deposited in our tender box on 1st floor Safaricom Care Centre, along Waiyaki Way, on or before 6th April 2023 at 12.00 pm.

Chief Executive Officer

Safaricom Sacco

P. O. Box 2392 - 00606, Sarit Centre

Tel: +254 111 222 226/7

Website: www.safaricomsacco.com

Tenders should be submitted in two separate envelopes with completed technical and financial proposals clearly marked:

(i) Technical proposal for Consultancy services to undertake development of Safaricom Sacco Strategic plan for the period 2024-2028.

(ii) Financial proposal for Consultancy to undertake development of Safaricom Sacco Strategic plan for the period 2024-2028.

Tenders will be opened immediately thereafter in the presence of bidders or bidders' representatives who choose to attend at Safaricom Sacco offices located at Safaricom Care Centre, Waiyaki Way Nairobi.

SECTION B: INFORMATION TO CONSULTANTS

1. Introduction

Safaricom Sacco will select a firm among those invited to submit a proposal, in accordance with the method of selection detailed under 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.

2. Preparation of Proposals

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

3. Technical Proposal

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

- i. Any comments or suggestions on the Terms of Reference outlined on page 15, 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 specialty, the tasks that would be assigned to each staff team member and their timing.
- iv. CV of the consultant
- v. Estimates of the total staff input (professional and support staff-time) needed to carry out the assignment.
- vi. A detailed description of the proposed methodology, staffing and monitoring of training.

The Technical Proposal shall not include any financial information.

4 Financial Proposal

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.

The Consultant shall express the price of their services in Kenya Shillings.

The Financial Proposal must remain valid for 120 days after the submission date.

Submission of Proposals

The completed Technical and Financial Proposals must be delivered at the submission address on or before the time and date stated. Any proposal received after the closing time for submission of proposals shall be returned to the respective consultant unopened. After the deadline for submission of proposals, the Technical Proposal shall be opened immediately by the evaluation committee. The Financial Proposal shall remain sealed and deposited with a responsible officer of the client department.

EVALUATION CRITERIA

(a) Mandatory Criteria

The mandatory criteria will be evaluated on a pass-fail basis.

1. Company profile
2. Certificate of business incorporation
3. A list of shareholders/partners and the directors with contact details
4. Valid tax compliance certificate
5. All printed pages of the tender document must be numbered and serialized by the tenderer to follow the format 0001..... to the last page of the document.

The Tenderers who do not satisfy any of the above requirements shall be considered non – responsive and will not be evaluated further.

(b) Technical Capacity Evaluation

The recommended qualification of the lead consultant are as follows:-

- i. At least a master's degree in a relevant field in the area of planning, financial consultancy, development studies
- ii. At least five years professional experience in strategic planning, management research and policy development,
- iii. Prior working experience in a Sacco or financial institution is an added advantage
- iv. Highly motivated and committed to the values of transparency and integrity;
- v. Skills in facilitation of stakeholder engagements/workshops;
- vi. Evidence of having undertaken similar assignments;

The technical evaluation criteria is as appended in the table below:

	CRITERIA	Score/Point
1	Relevant Experience for the Assignment (Corporate)	
a	Number of Strategic Plans developed. List assignments carried out in the last five years and provide dates and contact persons, name of the organization/company and resource personnel used for each (Score of 4 per assignment)	20
b	Years of experience of the firm: Minimum of 5 years (Score of 1 per year)	5
	Sub Total	25
2	Methodology and Approach	
a	Understanding the ToRs <ul style="list-style-type: none"> ● Conformity to the ToRs ● Consultant's initiatives and comments on the TORs 	15
b	Appropriateness of Methodology <ul style="list-style-type: none"> ● Completeness of description of methodology ● Effectiveness of the information collection Project schedule/work plan, allocation of proposed staff and final report outline 	10
	Sub Total	25
3	Human Resource Capacity	
a	Team leader: General education background and professional qualifications, length of experience, positions held, duration with the firm and experience in the country/region. The minimum qualifications is Masters Degree in in a relevant field in the area of Planning, Public Policy, Development Studies	10
b	Team leader's adequacy in carrying out the assignment: experience in the balance score card, Strategic Planning process in Private and Public sector performance management systems.	5
c	Other key staff: Education background, qualifications and experience, positions held and duration with the firm. The minimum qualifications is Bachelor's Degree in either, Economics, Business, ICT, or other relevant fields	3
d	Proof of availability of the whole team throughout the duration of assignment	2
	Sub Total	20
	TOTAL	70

Tenders must score at least 70% at the technical evaluation stage to progress to the next stage, that is, financial evaluation stage.

(c) Financial Evaluation

The financial evaluation criteria is as appended in the table below:

4	Financial Capability	
a	Financial Capability: Prove of adequate financial resources to undertake the exercises	30
	Total	30

Tenderers will be expected to quote in KES. Inclusive of all taxes.

Work Description	Amount (Kshs)
Consultancy Fees for developing the Strategic plan 2024-2028	
Miscellaneous expenses	
Disbursements (if any)	
Total	

Duration of the Consultancy Work

Tenderers are also expected to indicate their proposed payment schedule in the following format. The payment schedule will form part of the contract for the winning tenderer.

Proposed Payment Schedule

Work Description	Percentage (%)	Amount (Kshs)
Presentation of inception report for approval		
Presentation of draft final strategic plan 2024-2028 to management. Payment upon acceptance of the draft final strategic plan 2024-2028		
Submission, approval, and acceptance of the comprehensive strategic plan 2024-2028		
Total		

Contract Award

The unsuccessful consultants will be notified within 2-3 weeks after tender evaluation. The selected firm is expected to commence the assignment on the date and the location specified by the client.

SECTION C: - TECHNICAL PROPOSAL– STANDARD FORMS

These forms shall include;

- i) Technical Proposal submission form.
- ii) Firm's references.
- iii) Comments and suggestions of consultants on the Terms of Reference and on data, services and facilities to be provided by the Client.

- iv) Description of the methodology and work plan for performing the assignment.
- v) Team composition and task assignments.
- vi) Format of curriculum vitae (CV) for proposed professional staff.
- vii) Time schedule for professional personnel.
- viii) Activity (work) schedule.

(i). TECHNICAL PROPOSAL SUBMISSION FORM

[_____ Date]

To: _____[Name and address of Client]

Ladies/Gentlemen:

We, the undersigned, offer to provide the consulting services for strategic plan in accordance with your Request for Proposal dated _____[Date] and our Proposal. We are hereby submitting our Proposal, which includes this Technical Proposal, [and a Financial Proposal sealed under a separate envelope. We understand you are not bound to accept any Proposal you receive.

We remain, Yours sincerely,

_____ **[Authorized Signature]:**
 _____ **[Name and Title of Signatory]**
 _____ **[Name of Firm]**
 _____ **[Address:]**

(ii) FIRM'S REFERENCES

Relevant Services Carried Out in the Last Five 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:	No. of Staff:
Address:	No. of Staff- Days/Months (Duration of Assignment):

Start Date (Month/Year):	Approx. Value of Services (Kshs):
Completion Date (Month/Year):	
Name of Associated Consultants (If any):	No. of days/ 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; _____

(iii) COMMENTS AND SUGGESTIONS OF CONSULTANTS ON THE TERMS OF REFERENCE AND ON DATA, SERVICES AND FACILITIES TO BE PROVIDED BY THE CLIENT.

On the Terms of Reference:

- 1.
- 2.
- 3.
- 4.
- 5.

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

- 1.
- 2.
- 3.
- 4.
- 5.

(IV) DESCRIPTION OF THE METHODOLOGY AND WORK PLAN FOR PERFORMING THE ASSIGNMENT

(iv) . TEAM COMPOSITION AND TASK ASSIGNMENTS

1. Technical/Managerial Staff

Name	Position	Task

2. Support Staff (if any)

Name	Position	Task

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

Proposed Position: _____

Name of Firm: _____

Name of Staff: _____

Profession: _____

Date of Birth: _____

Years with Firm: _____

Nationality: _____

Membership in Professional Societies (if any): _____

Detailed Tasks Assigned: _____

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. _____ Date:

[Signature of staff member]

Date; _____

[Signature of authorized representative of the firm]

Full name of staff member: _____

Full name of authorized representative: _____

SECTION D: - FINANCIAL PROPOSAL – STANDARD FORMS

These forms shall include:-

- i) Financial Proposal submission form.
- ii) Summary of costs.

FINANCIAL PROPOSAL SUBMISSION FORM

[Date] _____

To: _____

[Name and address of Client]

Ladies/Gentlemen: We, the undersigned, offer to provide the consulting services for strategic plan in accordance with your Request for Proposal dated (_____) **[Date]** and our Proposal. Our attached Financial Proposal is for the sum of (_____) [Amount in words and figures] inclusive of the taxes.

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

We remain,

Yours sincerely, _____

[Authorized Signature] _____

[Name and Title of Signatory]: _____

[Name of Firm] _____

[Address]

SUMMARY OF COSTS

Costs	Currency(ies)	Amount(s)
Subtotal		
Taxes		
Total Amount of Financial Proposal		

TERMS OF REFERENCE FOR DEVELOPING THE SACCO'S STRATEGIC PLAN FOR 2024-2028

1.0 OVERVIEW

Safaricom Sacco is a Savings and Credit Co-operative Society, which was formed in 2001 and currently has 22 years of providing members with the opportunity to access loans to develop and improve their economic and social status. The Sacco's main role is to empower its members through provision of diversified products and services and has seen a significant growth with an Asset Base of 10Bn. The Sacco is currently regulated by Sacco Society Regulatory Authority (SASRA).

Safaricom Sacco is looking for a consultant who will work closely with the Safaricom Sacco Secretariat to facilitate the process of reviewing Safaricom Sacco 's current strategic framework and identifying new and ambitious goals and objectives for the period 2024-2028. This assignment will involve close engagement with the internal Safaricom Sacco Strategic Planning Team (comprising of the CEO, the Managers , and a team of other selected staff) and entail a participatory process, including, but not to:

- i. A review of internal documents and benchmark with similar institutions/ organizations
- ii. Consultations with Safaricom Sacco senior management and staff and selected partners/ stakeholders to review the current plan 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 of a draft Strategic Plan for the next phase and incorporating input from Safaricom Sacco staff, Board and selected stakeholders and partners.

1.1 Objectives

The main objective of this consultancy is to develop a new strategic framework for Safaricom Sacco that takes into account the current internal and external operating environment to enhance Sacco's effectiveness and sustainability in the area of Savings and Credit in Kenya and beyond.

1.2 Specific Objectives of the consultancy

To build on the achievements brought forward as part of the implementation of Safaricom Sacco's 2019- 2023 Strategic Plan and cognizant of its ever-changing operating environment, the consultant will review and guide Safaricom Sacco in clearly defining:

- i. Safaricom Sacco Vision, Mission, strategic areas and objectives; including priority focus areas for the strategic period
- ii. Safaricom Sacco situational context, through a SWOT, PEST and other relevant analysis.

- iii. Sustainability plan; including proposals for effective financial and Human resource strategies
- iv. Safaricom Sacco stakeholder map and identify relevant strategies to engage them to advance our stated objectives, stakeholder and
- v. Monitoring and reporting framework to enable effective tracking of the strategic plan
- vi. Costing of the plan.

2.0 SCOPE AND METHODOLOGY

The scope and focus of the assignment are to provide technical, strategic, and facilitation support to enable the renewal of Safaricom 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 Safaricom Sacco Secretariat 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 analysis);
- ii. Review of relevant organizational documents (vision, mission statement, theory of change, Business Plan, etc.);
- iii. Interviews with Safaricom Sacco secretariat; - 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 strategic framework - guided by the following questions:
 - a. Where does Safaricom Sacco want to be in 2028?
 - b. What does Safaricom Sacco want to achieve during this timeline?
 - c. How would Safaricom Sacco work to deliver its training and capacity building goals?
 - d. How will Safaricom Sacco get there?
 - e. What might go wrong for Safaricom Sacco in the dynamic business environment?
 - f. And how would Safaricom Sacco avoid this?
 - g. How will Safaricom Sacco know when we get there? (measure of success)

- h. How will Safaricom 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. Safaricom Sacco formally approves the final document;
- iv. Dissemination and implementation of the Strategic Plan.

3.0 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 Safaricom Sacco strategic direction, covering both internal and external factors relevant to the organizational operating environment.
- c) A two day strategic planning workshop for the Safaricom Sacco Staff, Board and selected partners
- d) A revised strategic plan incorporating all the feedback from the stakeholders.
- e) A consultancy report that includes the major activities of the consultancy, the highlights of the strategic planning workshop and an evaluation of the workshop

IMPORTANT NOTES TO THE VENDORS

Bidders are responsible to understand the scope of this RFP and to comply with the requirements specified in it. Bidder must provide accurate responses to the requirements within this document. References to external documents or websites will not be considered. Failure to comply to with any of the requirements in this RFP could cause the rejection of the bidder proposal. The responses of the bidder to this RFP will become the property of Safaricom Sacco Society. Safaricom Sacco Society reserve the right to use any information in this proposal to its benefit.

INSTRUCTIONS

- 1) The response document is to be fully and comprehensively completed in all respects.
- 2) All documents must be submitted in English.
- 3) You may be asked to clarify your answers or provide more details.
- 4) Safaricom Sacco Society will examine the documents to determine

completeness, general orderlies and sufficiency of response. Failure to complete this questionnaire and/or to provide written answers to any further questions or requested additional information for clarification will result in the supplier's elimination from further consideration.

- 5) Please note that by responding to this questionnaire you accept that all answers provided in this questionnaire are LEGALLY BINDING and should a need arise, may be used as evidence in any court of law. Further Safaricom Sacco Society reserves the right without further recourse to verify at its own cost the accuracy of any answers provided therein.
- 6) Information given by the applicant shall be treated in strict confidence.
- 7) Applicants to note that this DOES NOT amount to any contractual obligation on the part of Safaricom Sacco Society and Safaricom Sacco Society is not obliged to place orders with any of the respondents to this RFP.
- 8) Where insufficient space has been provided on the questionnaire, additional answers may be provided as supplementary on separate sheet bearing rubberstamp and signature of a senior person in the Organization.
- 9) The original document shall be prepared in indelible ink. It shall not contain interlineations or overwriting, except as necessary to correct errors made by the supplier. Any such corrections must be initialed by the person(s) who sign(s) the document.
- 10) The completed document shall be signed off and initialed by the authorized signatories of the organization.
- 11) Applicants will meet all costs associated with the preparation and submission of their applications.
- 12) Canvassing will lead to automatic disqualification of the applicant.
- 13) Submission is per instructions given in the Invitation to Tender.
- 14)** Late submission will not be acceptable. Any application(s) received after the date and time of closure will not be considered.