



**REQUEST FOR PROPOSAL (RFP) TENDER FOR
CONSULTANCY SERVICES TO UNDERTAKE
REBRANDING OF SAFARICOM SACCO LIMITED**

TENDER NO: SS/RFP/001/2024



INVITATION TO TENDER

Safaricom Sacco invites sealed proposals from interested eligible firms to tender for rebranding services to undertake the development of the Institution's Branding Strategy for a period of six months or as shall be guided by the Terms of reference. 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 Saccomanagement@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, should be delivered in a plain sealed envelope marked: **"SS/RFP/001/2024-REQUEST FOR PROPOSAL FOR REBRANDING CONSULTANCY"** and 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 **15th February 2024 at 4.00 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 Rebranding Services and Brand Development Strategy.
- ii. Financial proposal for Consultancy Services to undertake development of Safaricom Sacco Rebranding Services and Brand Development Strategy.

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, and 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. Curriculum Vitae of the consultants
- 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.

5. 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 Evaluation Criteria.

Note: Non-compliance with any MANDATORY requirement will automatically result in disqualification.

Stage 1: Mandatory requirement		
No.	Requirements	Remarks(Yes/No)
1.	Company background and profile	
2.	Postal and physical address of the business	
3.	Email address	
4.	Certificate of Registration/Incorporation	
5.	Valid/Current Tax Compliance Certificate	
6.	CR12 Letter from Registrar of Companies or equivalent to show names of Directors of the tendering company (in case of a company), Name of Proprietor (for Sole Proprietor and Business Name) and Names of Partners (for Partnerships) – as applicable	
Stage 2: Technical Evaluation		
S/No.	Evaluation Parameter	Allocation of Marks
1.	Firms Experience Detailed information for a minimum of four (4), previous engagements in the financial services and specifically in the Commercial Bank and SACCO sector undertaken within the last ten (10) years that is similar to this assignment. Each experience of a similar nature outlined attracts 5 points. <i>(Attach LPO'S, Letter of offer or Contracts as evidence that the company has handled similar assignment).</i>	20
2.	Relevant professional qualifications of Key consultants provided <ol style="list-style-type: none"> i. Qualifications and experience of key consultants to be used on the project-on three (3) similar and relevant assignments within the last five (5) years. Involvement in each assignment per consultant attracts 3 Points-Room given for 5 consultants. ii. Demonstrate relevance of the key consultants' 	15

	<p>experience (Financial Sector). (Must have qualification in brand, communication and/or marketing strategy and creative development or any other related filed with valid certification from the relevant body)</p>	
3.	<p>Capability</p> <ul style="list-style-type: none"> i. Clearly defined pointers to prove ability, capability to successfully deliver and facilitate on the requirements of a branding assignment including; <ul style="list-style-type: none"> a) Clarity of understanding of the assignment – 3 Points b) Clear deliverables – 3 points c) Implementation matrix – 3 points ii. Comprehensive methodology for execution of the project with timed stages clearly defined with deliverables. - 6 points 	15
4.	<p>Work plan, and implementation timelines- Clear and well thought out description of implementation of project activities. (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)</p>	20
5.	<p>Additional Technical Requirements</p> <ul style="list-style-type: none"> (i) Proposed improvement of the Terms of Reference (j) 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. 	10
6.	<p>Oral Presentation</p> <p>Proposers who will have met the mandatory requirements will be required to make oral 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 as part of the Technical Evaluation process. Safaricom Sacco reserves the right to incorporate elements from oral presentations in the final Contract.</p>	20
Total Marks		100

Duration of the Consultancy Work

Evaluation of tenders will be conducted based on the tenders' response to the mandatory requirements and their compliance to the evaluation criteria. Tenders scoring 70% and above on technical evaluation will be subjected to financial evaluation based on their price schedule. SAFARICOM SACCO may after Tender Evaluation but prior to award of tender conduct a post qualification due diligence.

Stage 3: Financial Evaluation

- (i) Only those bids which meet ALL the above requirements will be considered for financial evaluation.
- (ii) All items MUST be quoted for.
- (iii) Checking for errors.
- (iv) Checking for fully filled, signed and stamped financial proposal submission form.
- (v) The lowest evaluated bidder on all items rates/cost will be recommended for award.

FINANCIALS:

- Lowest bid - 10 Points
- 2nd Lowest - 7 Points
- 3rd Lowest - 5 Points
- Others - 2 Points

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

NB: Financial envelope shall be separately sealed and addressed to stated details above.

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.

Work Description	Percentage %	Amount
Presentation of inception report for approval including Brand Audit.		
Presentation of draft final Brand Strategy, Logo creation, Brand Design and Brand Manual, External communication and PR strategy, Brand engagement and Launch Strategy.		
Submission, approval, and acceptance of the comprehensive of the rebranding strategy.		
Total		

Contract Award

The unsuccessful consultants will be notified within 2-3 weeks after tender evaluation.

The most competitive firm shall be considered for negotiation and awarded the tender once the evaluation process is completed. The selected firm is expected to commence the assignment immediately.

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 Safaricom Sacco Rebranding and Brand Strategy Design 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 with other organizations was legally contracted.

Name of Client:	
Address:	
Name of Assignment:	

Description of the Assignment:	
Contact Person:	
No. of Staff Assigned to the Project:	
Duration of Assignment:	
Approximate value of Assignment (Ksh):	
Name of Associated Consultants (If any):	
Duration of Engagement:	
Staff Provided by Associated Consultants:	
Name of team lead:	
Functions performed:	

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

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 rebranding services in accordance with your Request for Proposal dated (_____). 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	Currencies	Amount
Sub- Total		
Taxes		
Total Cost		

TERMS OF REFERENCE FOR SACCO REBRANDING PROPOSAL

INTRODUCTION

Safaricom Sacco is a Savings and Credit Co-operative Society, which has been in operation for 22 years providing members with the opportunity to access loans to develop and improve their economic and social status. It boasts a robust membership of 18,000 members from Safaricom Ltd and other Technology related companies (Over 100) who form our main common bond.

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 11Bn. The Sacco is licensed and regulated by Sacco Society Regulatory Authority (SASRA) as a Deposit Taking Sacco and operates two branches at Safaricom Care Centre, Westlands and Jambo Care Centre in Mlolongo.

OBJECTIVE

Safaricom Sacco opened its common bond to allow recruitment of members from other organizations (bonds), individuals as well as corporate members. The Board and management of the Sacco recognizes that there is an opportunity to grow, innovate, tap into new businesses or customers, and to reconnect with its users.

It therefore wishes to contract a suitable branding and communications agency to develop a re- brand strategy and guide the creative conception and execution stages to promote the organization at scale.

The selected consultant will work closely with the Sacco to review the Safaricom Sacco brand; develop a brand strategy and execute a re-brand of the organization.

This scope of work serves as a guide and is by no means exhaustive. Service providers are expected to indicate value-adds and the ability to provide the services required without outsourcing any of its functions.

ACTIVITIES, DELIVERABLES AND TIMELINES, PLUS BUDGET PER DELIVERABLE

1. Conduct a brand Audit – this will involve a desk review and survey among Sacco Members and key stakeholders to assess the suitability of the name with respect to current brand equity and positioning in the market. This will help the Sacco to understand how our customers perceive and connect with the brand, and to gain insights into our strengths and weaknesses, and define a clear strategy for improvement.

2. Development of Logo and Brand Book - Conceptualization, Creative and Design
 - a. **Brand Book:** Logo Lockup, Usage, Brand Colors and Values CMYK and Pantone (Primary and Secondary) Font(s)/Typography, Placement, Imagery Style Graphic Elements Identity Kit,

- b. **Logo Application** on stationery, print media, banners, merchandise, and digital media (email signatures, social media, eshots)
3. Review/develop a brand identity, slogan/tagline, personality, value proposition, brand positioning etc.
4. Develop three creative rebrand concepts of the selected name; the concepts will be shared for review by Management and the Board to select one concept.
5. Conduct a testing process of the rebranding concept selected in (4) above: this includes collecting stakeholders' input on the chosen concept. This will be followed by presenting production proposals for the execution of the chosen concept.
6. Refine and finalize the selected brand identity based on the feedback from the previous stages and deliver to Safaricom Sacco.
7. Develop guidelines on brand positioning considering new Sacco brand guidelines.

TIMEFRAME

The contract will be for a period of 6 months commencing from **March 2024 to August 2024**.

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.

EXPECTED DELIVERABLES

- a) A brand Audit Report detailing the current brand assessment including performance and positioning, strengths and weaknesses and identified areas of improvement, data backed insights to base future decisions on marketing and digital strategy.
- b) Reviewed / New brand identity including a proposed Logo, slogan/tagline, personality, value proposition, brand positioning and corporate colors.
- c) Three branding concepts for review.
- d) A report on the testing of the selected brand concept.
- e) A rebranding execution strategy detailing how the rebranding will be conducted including communication to stakeholders.

IMPORTANT NOTES TO THE VENDORS

Bidders are responsible for understanding the scope of this RFP and complying with the requirements specified in it. Bidders must provide accurate responses to the requirements within this document. References to external documents or

websites will not be considered. Failure to comply 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 which shall 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 the Sacco 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.