



**UKRISTO NA UFANISI SACCO LIMITED  
REQUEST FOR PROPOSAL FOR CONSULTANCY SERVICES TO DEVELOP UKRISTO NA UFANISI  
SACCO STRATEGIC PLAN FOR THE PERIOD 2024-2028**

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**CLOSING DATE: TUESDAY 23<sup>RD</sup> FEBRUARY 2024**

**REQUEST FOR PROPOSAL FOR CONSULTANCY SERVICES TO DEVELOP UKRISTO NA UFANISI  
SACCO STRATEGIC PLAN**

Ukristo Na Ufanisi SACCO Ltd is a licensed and regulated deposit taking SACCO in Kenya. The SACCO has a membership of over 30,000 members and an asset base of 2 billion. The SACCO invites proposals from eligible candidates for Provision of Consultancy Services on development of her strategic plan 2024-2028 and whose specifications are detailed in the proposal document which is available in the SACCO's website.

Completed proposals shall be submitted in hard copy under the subject "REQUEST FOR PROPOSAL FOR PROVISION OF CONSULTANCY SERVICES FOR DEVELOPMENT OF STRATEGIC PLAN 2024-2028" and addressed to:

**The Chief Executive Officer  
Ukristo Na Ufanisi Sacco Ltd  
P.O. Box 872, 00605  
NAIROBI**

The sealed envelope should be deposited in the tender box at the Head Office located at ACK Emmanuel Church Riruta, Opposite Co-operative bank 46 and 100 Meters off Gitanga road along Chief's road on or before 23<sup>rd</sup> February 2023 between 9:00am – 4:00pm upon payment of non-refundable fee of 2,000.00.

## **BACKGROUND INFORMATION TO CONSULTANCY FIRMS**

Ukristo na Ufanisi Sacco Limited is a Christian financial institution that was founded in the year 2001 by the then Anglican Bishop of the Diocese of Mt. Kenya South the Rt. Rev. Timothy Mbutia Ranji. The SACCO was registered on 2<sup>nd</sup> November 2005 under the Co-operative Societies Act of the Laws of Kenya - Number 10541 and is currently licensed by SASRA.

The Sacco has 8 fully operational branches at Riruta (Head office), Kiserian, Ngong, Kangemi, Kiambu, Limuru, Wangige, Utawala Branches and a field office at Piai along Makutano Meru Road.

Ukristo na Ufanisi Sacco Limited wishes to invite proposals from duly approved and authorized consultant firms for the development of its strategic plan for the period of 2024 -2028. It is in this regard therefore that we extend this invitation to your firm.

If you are interested, we would appreciate receiving a written proposal from your firm, comprising both technical and financial components sealed separately but enclosed in one envelope and appropriately addressed as per details provided above.

## **OBJECTIVES**

The main objective of this consultancy is to develop a new strategic plan for Ukristo na Ufanisi Sacco Limited 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.

The consultant will review and guide Ukristo na Ufanisi Sacco Limited in clearly defining the following:

- 1) Ukristo na Ufanisi Sacco Limited Vision, Mission, strategic areas and objectives; including priority focus areas for the strategic period
- 2) Ukristo na Ufanisi Sacco Limited situational context, through a SWOT, and any other relevant analysis.
- 3) Ukristo na Ufanisi Sacco Limited sustainability plan which will include proposals for effective Financial and Human resource strategies
- 4) Ukristo na Ufanisi Sacco Limited stakeholder map and identify relevant strategies to engage them to advance our stated objectives, stakeholder
- 5) Monitoring and reporting framework to enable effective tracking of the strategic plan
- 6) Costing of the plan.

## **SCOPE OF WORK AND METHODOLOGY**

The scope and focus of the work is to provide technical, strategic, and facilitation support to enable the renewal of Ukristo na Ufanisi 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 Terms of Reference, the following steps are suggestions as a basis for the strategic plan development process.

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

- 1) Inception workshop with Ukristo na Ufanisi Sacco Limited team to discuss scope, methodology and timeline;
- 2) Inception report outlining the key steps/methodology with specific deliverables and timeline; contextual analysis.

### **Step Two: Review, Assess and Analyze;**

- 1) Participatory process of critical reflection, analysis and consultation (SWOT analysis);
- 2) Review of relevant organizational documents (vision, mission statement, theory of change, Business Plan, etc.);
- 3) Interviews with Ukristo na Ufanisi Sacco Limited team; - assessment report outlining critical issues, contextual analysis, gaps to be addressed and opportunities to grab.

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

- 1) Analyze feedback from the different sources;
- 2) Formulate strategic framework.

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

- 1) Draft the text around the key objectives;
- 2) Consult widely on draft new strategic framework;
- 3) Ukristo na Ufanisi Sacco Limited formally approves the final document;
- 4) Dissemination and implementation of the Strategic Plan.

**EXPECTED DELIVERABLES**

An inception report detailing the methodology/approaches and timelines associated with this consultancy assignment

A needs assessment report highlighting the current status and gaps in Ukristo na Ufanisi Sacco Limited strategic direction, covering both internal and external factors relevant to the organizational operating environment.

A Strategic planning workshop for the Ukristo na Ufanisi Sacco Limited Staff, Board and selected partners.

A revised Strategic Plan incorporating all the feedback from the stakeholders.

A consultancy report that includes the major activities of the consultancy, the highlights of the strategic planning workshop and an evaluation of the workshop.

**EVALUATION CRITERIA**

**Mandatory requirements**

<b>Requirement</b>	<b>Pass</b>	<b>Fail</b>
Certificate of business incorporation/registration of the firm in Kenya.		
Company profile		
Valid and current Tax Compliance Certificate		
Two proposals (Technical Proposal and financial)		
Current Single Business Permit		

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

	<b>CRITERIA</b>	<b>Score/Point</b>
<b>1</b>	<b>Relevant Experience</b>	

<b>a</b>	<p><b>Number of Strategic Plans developed:</b></p> <p>Evidence of providing Strategic Consultancy services to five <b>(5)</b> Financial Institutions/Cooperative societies in the last five <b>(5)</b> years (<i>Attach contracts awards / LPO or Letter of award</i>)</p>	25
<b>b</b>	<p>Years of experience of the firm: Minimum of 5 years (<i>Score of 1 per year</i>)</p>	5
<b>Sub Total</b>		<b>30</b>
<b>2</b>	<b>Methodology and Approach</b>	
<b>a</b>	<ul style="list-style-type: none"> <li>• Understanding the Terms of References</li> <li>• Conformity to the Terms of References</li> <li>• Consultant’s initiatives and comments on the Terms of References</li> </ul>	15
<b>b</b>	<ul style="list-style-type: none"> <li>• Appropriateness of Methodology</li> <li>• Completeness of description of methodology</li> <li>• Effectiveness of the information collection</li> </ul>	15
<b>c</b>	<p>Project schedule/work plan, allocation of proposed staff and final report outline should be between 12 -16 weeks.</p> <p>Bidders must breakdown each activity and show the deliverables, duration and the personnel (<i>based on expertise</i>) involved in each assignment and/or activity.</p> <ul style="list-style-type: none"> <li>• deliverable (<i>5 marks</i>),</li> <li>• duration (<i>3 mark</i>),</li> <li>• Personnel (<i>2 marks</i>).</li> </ul>	10
<b>Sub Total</b>		<b>40</b>
<b>3</b>	<b>Human Resource Capacity</b>	
<b>a</b>	<p><b>Team leader</b> - This section will focus on General education background and professional qualifications, length of experience, positions held, duration with the firm and experience in the Financial Industry with keen interest on the Sacco Sector.</p>	15

	<p>The team leader should be well conversant with Strategic Planning, performance management, business continuity planning, performance targeting, risk management as well as monitoring &amp; evaluation.</p> <p>The minimum qualifications is Master’s Degree in the relevant fields.</p> <p>Attach detailed CVs as well as academic certificates. This will be marked as follows;</p> <p>Team Leader’s CV demonstrating the Team Leader’s adequacy in carrying out the assignment: education, training experience in the specific sector, field, subject and relevance to the strategic planning.</p> <p><i>(5 marks).</i></p> <p>At least a master’s degree in either Economics, Strategic Planning, Public Policy or a related social science</p> <p><i>(3 marks for copy of masters degree certificate provided).</i></p> <p>The minimum years of experience should be 10 Years in a relevant field <i>(2 Marks).</i></p> <p>Demonstrable experience in development of strategic plans <i>(5 marks).</i></p>	
<p><b>b</b></p>	<p><b>Key Experts</b> - Education background, qualifications and experience, positions held and duration with the firm.</p> <p>Evidence of adequacy and capability of carrying out the assignment: experience in the ICT sector, development of Strategic Plans for Sacco Sector agencies, and performance management systems.</p> <p>Attach detailed CVs as per the prescribed format and academic certificates.</p> <p>Bidder should submit CV’s of at least five (5) key experts detailing their adequacy in carrying out the assignment: This includes field of study, experience and achievements relevant to the strategy development.</p> <p><i>(1 Mark for each CV submitted and zero for none).</i></p> <p>The Experts should comprise of holders of least a Degree in: Economics/Business, Human Resource, Finance, Communication,</p>	<p>5 marks</p> <p>5 marks</p>

	<p>Engineering/Electronics/Computer Science/or related technical field. (Attach copies of degree certificates for staff).</p> <p>At least 5 years’ experience in the relevant field for each of other listed staff</p> <p><i>(1 mark each for each staff (maximum of 5 experts) and zero marks for experience of less than 5 years).</i></p>	5marks
	<b>Sub Total</b>	<b>30</b>
	<b>Total</b>	<b>100</b>

**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.

**Financial Evaluation**

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

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

<b>Work Description</b>	<b>Amount (Kshs)</b>
Consultancy Fees for developing the Strategic plan 2024-2028	
Miscellaneous expenses	
Disbursements (if any)	
<b>Sub Total</b>	
<b>VAT</b>	
<b>Total</b>	

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**

<b>Work Description</b>	<b>Percentage (%)</b>	<b>Amount (Kshs)</b>
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		
<b>Total</b>		

**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.