



CHAI SACCO
— *count on us* —

CHAI SACCO SOCIETY LTD

KTDA Plaza, 4th Floor

P.O. Box 278-00200 Nairobi

**EXPRESSION OF INTEREST FOR PROVISION
OF CONSULTANCY SERVICES FOR
DEVELOPMENT OF A STRATEGIC PLAN
2019-2023**

TENDER NO. CHAI/EOI/SP/2018

CLOSING DATE: WEDNESDAY 09TH MAY, 2018

CLOSING TIME: 10:30 AM

INVITATION TO TENDER

Chai Sacco society Ltd invites proposals from eligible candidates for the **expression of interest for Provision of Consultancy Services for development of strategic plan 2019-2023** whose specifications are detailed in the proposal Document.

Completed proposals shall be submitted in hard copy under the subject **“EXPRESSION OF INTEREST FOR PROVISION OF CONSULTANCY SERVICES FOR DEVELOPMENT OF STRATEGIC PLAN 2019-2023”** and addressed to:

**The Chief Executive Officer
Chai SACCO Society Ltd
P.O. Box 278, 00200
NAIROBI**

And deposited in the Tender Box situated at the Reception - Chai Sacco Society Ltd, **KTDA PLAZA, 4th Floor** so as to be received on or before **Wednesday 09th May 2018 at 10:30 am.**

CHIEF EXECUTIVE OFFICER

INTRODUCTION

This Tender includes the following:-

- i) Background Information to Consultancy Firms
- ii) Scope of work

TERMS OF REFERENCE FOR PROVISION OF CONSULTANCY SERVICES FOR DEVELOPMENT OF STRATEGIC PLAN 2019-2023

Background

Chai Sacco Society Limited was registered in 1973 to offer financial services to KTDA employees both at the factories and Head Office.

In 1999, Front Office Service Activity (FOSA) was started and has evolved to a fully-fledged Deposit Taking Society. In addition to Nairobi and Litein branches, the Sacco opened three new branches in 2016 in Nkubu, Kisii, and Mombasa. Two (2) Marketing Offices have also been opened in Olenguruone and Silibwet towns. The Society intends to open more branches and marketing offices countrywide.

The common bond was opened in 2005 to include members from well-established business organizations and tea farmers. The society has widened her membership to include business people, investors, and savers beyond the KTDA employees

The Society has been recognized internationally by the World Council of Credit Unions (WOCCU) in Micro-Finance Expansion Programme (MFI) among other sixteen SACCOs in the country as a model for others. The Society has also been selected by Micro-Save Africa in product Development Programme from micro enterprises to assist the organization in product development process.

Chai Sacco Society Ltd (hereinafter the Society / Sacco), wishes to invite proposals from duly approved and authorized consultant firms for the conduct of strategic plan for the period of 2019-2023. 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.

The proposals should be submitted to the Society on or before **Wednesday 09th May 2018**

Scope of work

Development of strategic plan 2019-2023

Aimed at facilitating internal and multi-stakeholder meetings and consultation processes, the scope of work of the consultant will include but not be limited to:-

- a) Undertake a situational analysis of the work of Chai Sacco to date through inter alia the review of the vision and mission of the Sacco based on the past and current engagements of the Sacco since inception including the 2014 -2018 Strategic Plan, and other pertinent documents;
- b) Undertake a stakeholder mapping and analysis, and hold consultations with key stakeholders;
- c) Through a consultative process and application of an appropriate tool of analysis, identify focus areas and develop strategic objectives and key result areas for the same;
- d) Review the institutional capacity, organizational set up, financial and administrative arrangements for the effective engagement of the Sacco (including the review of the organizational processes and decision making structures to recommend required changes to improve effectiveness);
- e) Propose a strategy for achieving the strategic objectives and key result areas;
- f) Develop a Results and Resources Framework for the plan period;
- g) Hold a stakeholder meeting to validate the draft Strategic Plan;
- h) Finalize the Strategic Plan and submit to Chai Sacco.

Deliverables

- a) Develop five –year Strategic Plan including Results and Resources Frameworks
- b) Report on the processes including stakeholder consultations and workshops.

Evaluation Criteria

Mandatory requirements

S/No	Requirement	Pass	Fail
1.	Certificate of business incorporation/registration of the firm in Kenya.		
2.	Company profile		
3.	Valid and current Tax Compliance Certificate		
4.	Two proposals (Technical Proposal and financial)		
5.	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.

Technical requirements

S/No	Specification	Weighting (Marks)
1.	Provide Details of at least five (5) consultancy services undertaken in strategic plan development, summary of services rendered, value of contracts and contact persons	30
2.	Adequacy of methodology and work plan in response to the terms of reference	20
3.	The Consultants shall be required to have a proven track record of development strategic plan. The lead consultant must have at least 8 years' experience in guiding organizations to develop strategic plan. All the proposed consultants must have a minimum of a University degree. (Attach Curriculum Vitae and Certificates)	30
4.	The proposed Consultants must have relevant Certifications from a recognized institution/organization	20