

**TENDER DOCUMENT**

**TENDER NO:KSSL/SPR&P/11/2022-2023**

**FOR PROVISION OF STRATEGIC PLAN REVIEW**

**2021-2023**

**AND**

**STRATEGIC PLAN FORMULATION AND DEVELOPMENT 2024-2026**

1. A complete tender document can be obtained from [www.kimisitusacco.or.ke](http://www.kimisitusacco.or.ke) or [www.srmhub.com](http://www.srmhub.com) upon payment of a non-refundable fee of one thousand Kenya shillings (Ksh. 2,000) which must be paid to Kimisitu Sacco Society Limited through MPESA as follows:

 **1. GO TO LIPA NA M-PESA**

**2. PAYBILL BUSINESS NUMBER: 911200**

**3. ACCOUNT NUMBER: 2022TPL**

1. Interested eligible candidates may obtain further information and inspect the tender documents online from **Friday December 2, 2022, until Thursday December 15, 2022,** before closing time at 2.30 pm
2. The tender process will be conducted online, and bids **MUST** be submitted electronically, all interest and eligible bidders must complete the tender application online via, **SRM portal** Interested and eligible firms who wish to participate in the tenders must visit [www.srmhub.com](http://www.srmhub.com); under the tab written “**Apply Tender**”. More information will be available on this link.

**Chief Executive Officer**

**Kimisitu Sacco Society Limited**

**P.O. Box 10454- 00100 Nairobi.**

So as to reach us on **or before Thursday December 15, 2022**. The tender will be opened online soon thereafter at **3.30 P.M** in the presence of the bidders’ representatives who choose to attend.

***The Sacco reserves the right to reject any proposal without giving reasons for the rejection and does not bind itself to accept the lowest or any proposal***.

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| 1  | Name of Organization  |   |
| 2  | Postal Address  |  P.O Box…………………Code…………………..  |
| 3  | Principal Contact Person  |  Name…………………………………………………………  Position………………………………………………………..  |
| 4  | Contact:  |  Telephone:…………………………………………………  Email:………………………………………………  |
| 5  | Physical Location of Business Premises  |  Town:……………………………………Street:………………………  Building Name:……………………Floor:……………………………………  |
| 6  | Business Operations     |  Year established…………………………………………  Duration of Business Operation………………………….  |
| 7  | Company Registration No: (*Attach copy)* Tick one  |  Number:…………………………………….  |
|  8  |  VAT Registration No: (*Attach Copy*) PIN certificate  |  Number Attached copy?  Number Attached copy?  |
| 9   |  Valid Tax Compliance Certificate (Attach copy)  |  Attached Copy?  YES…………………….NO………………..  |
| 10  | Provide a brief description of Services that you offer  |     |

Provide contact details for 3 referees for previous/ current work that is similar or the same to the one now applied for. Note that the referees may be contacted without your further references to you**.**

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| A  | Have you provided any services to Kimisitu Sacco Society Limited before? (Tick one)  |

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YES NO  |
|  1  | Organization Name & Rubberstamp Contact Name & Position Telephone & E-mail Address Human Resource Consultancy Services Total Value of Service  |  ………………………………………………………… ………………………………Sign.……………….. Date…………. Tel……………………………Email………………………………  Service Provided………………………………………………  Kshs…………………………………………………………………  |
|  2  | Organization Name & Rubberstamp Contact Name & Position Telephone & E-mail Address Human Resource Consultancy Services Total Value of Service  |  ………………………………………………………… ………………………………Sign.……………….. Date…………. Tel……………………………Email………………………………  Service Provided………………………………………………  Kshs…………………………………………………………………  |
|  3  | Organization Name & Rubberstamp Contact Name & Position Telephone & E-mail Address Human Resource Consultancy Services Total Value of Service  |  ………………………………………………………… ………………………………Sign.……………….. Date…………. Tel……………………………Email………………………………  Service Provided………………………………………………  Kshs…………………………………………………………………  |

**SECTION II INSTRUCTIONS TO TENDERERS**

**2.0 EXPRESSION OF INTEREST**

Kimisitu SACCO hereby invites interested consultants to submit technical and financial proposals on Strategic Planning Facilitation.

**2.1 TERMS OF REFERENCE FOR THE STRATEGIC PLANNING 2024– 2026**

**2.1.1 Background**

Kimisitu Savings and Credit Co-operative Society Limited was registered in 1985 under the Co-operative Societies Act with the objective of promoting the economic interest of its members through mobilization of deposits and granting affordable credit.

Kimisitu Sacco’s main objective is to promote thrift amongst its members by affording them an opportunity for accumulating their savings; and thereby create a source of funds from which loans can be made to the members exclusively for provident and productive purposes, at fair and reasonable rates of interest; thereby enabling them to use and control their money for their mutual benefit. To achieve this objective, the board of directors, management, and staff of Kimisitu Sacco are committed to:

1. Providing our customers with quality services that meet or exceed their expectations.
2. Empowering our members economically.
3. Enabling our members to earn competitive returns on their deposits.
4. Regularly assessing our performance and continually improving our practices, including the quality management system.
5. Creating a culture and work environment where the organization objectives can be achieved and where individuals can excel.
6. Satisfying the requirement of the ISO 9001:2015 standard as well as legal and other applicable requirements.

The SACCO current strategic plan 2021 - 2023 is expiring by the end of financial year 2023. The SACCO is therefore in the process of developing its new 3-year strategic plan 2024 -2026. This document will stipulate the SACCO direction and growth path envisioned in the next 4 years.

**2.1.2 Purpose**

Kimisitu SACCO seeks a consultant to conduct a review of the current strategic plan 2021 – 2023 and facilitate the development of a new strategic plan 2024 – 2026.

**2.1.3 Objectives**

The overall objective of this strategic planning process is to develop the SACCO Strategic priorities for the next 3 years.

**2.1.4 Specific Objectives**

1. Undertake a thorough review of the status of performance of Sacco’s Strategic plans in comparison to leading Tier 1 Deposit Taking Saccos’ in the country and across the globe, ongoing development plans and future requirements.
2. Undertake a thorough review of the status of implementation of the Strategic Plan 2021-2023 with a view to establishing successes, challenges, lessons learnt, changes in environment and assumptions vs future requirements.
3. Undertake a thorough review of the Sacco’s Engagement, Sustainability, Image and Identity, Co-operative Environment and Co-operative Capital, with the aim of increasing quality Member Services and retention, responsive and competitive products and services, Education and Skills Development, Policy and Legal Framework, Accelerating Access to Finance, and Mobilizing and Leveraging Resources.
4. Develop a prioritized strategic action plan that has clear roles and responsibilities in the implementation matrix with clear budget and a monitoring and evaluation plan.
5. Review the SACCO’s capacity, organizational set-up, against its mandate and the identified strategic objectives and key result areas; and make recommendations, if any, on institutional capacity requirements
6. Undertake stakeholder mapping and analysis to establish who the Kimisitu Sacco key stakeholders are and the role they play and the influence they may have in the execution of Sacco’s mandate.
7. Through a consultative process and application of an appropriate tool of analysis, identify the key areas of focus during the next strategic planning period and develop strategic goals and objectives. Thereafter, break down each strategic goal into multiple strategic objectives and activities that represent key components of Sacco’s approach to achieving its mandate.
8. Through stakeholders’ consultative meetings, develop to the Sacco a forward-looking Strategic Plan 2024 -2026 that will ensure robust membership growth and retention, Growth in Institutional Capital, Increase in Share Capital, Increase in deposits, growth in loan book and income.
9. Propose a strategy for achieving the key result areas and strategic objectives. The strategy should represent Sacco’s proposed approach for adapting to emerging issues to ensure that the Strategic Plan is flexible and adaptable as the Financial and Sacco sector evolves, while providing clear and measurable targets.
10. Assess the proposed strategic objectives for sustainability and inclusion and propose a clear mainstreaming framework to support the strategic objectives, as appropriate
11. To assess the existing and projected strategic risks that may impact on the achievement of the set corporate objectives and recommend mitigation measures, together with a robust monitoring, evaluation, report and learning mechanisms for the effectiveness of the adopted strategic risk management framework
12. Moderate the stakeholder meetings and workshops to validate the draft Strategic Plan.
13. Prepare an implementation matrix for the Strategic Plan
14. Finalize the Strategic Plan and submit it to Sacco.

**Deliverables**

**Phase 1 – Strategic Plan performance Review 2021 -2023**

1. Inception report – the Consultant will submit an inception report within 2 weeks after commencement and after consultations with key stakeholders.
2. Draft Final reviewed Strategic plan performance 2021- 2023 for presentation and discussion in a validation forum to brainstorm and further alignment towards the Strategic objectives of the Sacco.
3. A report on the Board/Management retreat on consultation, validation, and adoption of the Draft reviewed Strategic Plan performance. The delivery should be given within one (1) week after the Board consultation exercise.

**Phase 2 -Strategic Plan Development 2024-2026**

The purpose of this phase is to help the Board, Management and staff formulate and develop proactive and forward-looking Sacco Strategy for the period 2024 – 2026 that will be the road map for its success for the next three years.

1. Report – the Consultant will submit an inception report within 2 weeks after commencement and after consultations with key stakeholders.
2. Draft Final Strategic plan 2024-2026 for presentation and discussion in a validation forum to brainstorm and further alignment towards the Strategic objectives of the Authority. The delivery should be done within 8 weeks after commencement.
3. A report on the Stakeholders consultation and validation of the Final Strategic Plan. The delivery should be done within 8 weeks after commencement.
4. A report on the Board/Management retreat on consultation, validation, and adoption of the Draft Strategic Plan. The delivery should be given within one (1) week after the Board consultation exercise.
5. A comprehensive three-year implementation matrix outlining all strategic objectives, initiatives and activities, the timelines, responsible Departments/ and resource plans for the achievement of the Sacco’s vision – with annual action and work plans.
6. Consolidated Final Report Comprising of:
	1. A Strategic Plan 2024 - 2026
	2. Simplified Members Version of the Strategic Plan 2024-2026.
	3. A Comprehensive 3-Year Action Implementation Matrix.

**2.1.6 Scope of work**

The assignment is to provide technical and strategic facilitation support for the review of the current strategic plan and development of the year 2024 -2026 Strategic Plan. After initial review, the consultant will develop a work plan to guide the assessment. The consultant will also conduct a thorough assessment of the SACCO strengths and weaknesses, opportunities, and threats with a view of identifying the appropriate strategic direction for the next 4 years.

The assessment will include review of relevant documents including the SACCO vision and mission, core values, strategic objectives, internal and external reports. The consultant in collaboration with the management and the board will use a participatory approach to facilitate critical strategic reflection and thinking.

It will be imperative that data be analyzed using effective analysis framework tools, summarized, and presented to Kimisitu SACCO to support the strategy development process. The consultant will be expected to prepare for and facilitate workshops for the year 2024-2026 strategic plan review and strategic planning with Kimisitu staff members, Board members and other relevant stakeholders. All data, findings and results of the workshops will be consolidated into a final strategic plan document.

1. **Contracting requirements**

The contracting authority is Kimisitu Sacco Society Ltd

* 1. The appointed Vendor will be expected to deliver and provide services at a location that will be communicated by Kimisitu Sacco Society Ltd.
		1. Kimisitu Sacco Society Ltd.’s contracting and commercial approach in respect of the required services is set out at Annex (Terms and Conditions of contract) (“Contract”). By submitting a tender response, you are agreeing to be bound by the terms of this RFP and the Contract without further negotiation or amendment.
		2. If you have any concerns or queries in relation to the Contract, you should submit a clarification request in accordance with the provisions of this RFP by the Clarification Deadline (as defined below in the Timescales section of this RFP). Following such clarification requests, Kimisitu Sacco Society Ltd may issue a clarification change to the Contract that will apply to all potential Vendors submitting a tender response.
		3. Kimisitu Sacco Society Ltd is under no obligations to consider any clarifications / amendments to the Contract proposed following the Clarification Deadline, but before the Response Deadline (as defined below in the Timescales section of this RFP). Any proposed amendments received from a potential Vendor as part its tender response shall entitle Kimisitu Sacco Society Ltd to reject that tender response and to disqualify that potential Vendor from this Procurement Process.

**4**.**0 General Policy Requirements**

4.1.0 By submitting a tender response in connection with this Procurement Process, potential Vendors confirm that they will, and that they shall ensure that any consortium members and/or subcontractors will, comply with all applicable laws, codes of practice, statutory guidance, and applicable Kimisitu Sacco Society Ltd policies relevant to the goods and/or services being supplied. All relevant Kimisitu Sacco Society Ltd policies that Vendors are expected to comply with on this training include the Procurement policy, Finance Policy, ISO 9001:2015 QMs and Standard, Internal Audit Policy, Human resources and Administration Policy, Health and Safety Policy, Environmental Policy, Records Management, and Privacy.

1. **General tender conditions (“Tender Conditions”)**
	1. Application of these Tender Conditions – In participating in this Procurement Process and/or by submitting a tender response it will be implied that you accept and will be bound
	2. by all the provisions of this RFP and its Annexes. Accordingly, tender responses should be based on and Financial (Sacco) in accordance with the requirements of this RFP.
	3. Third party verifications – Your tender response is submitted on the basis that you consent to Kimisitu Sacco Society Ltd carrying out all necessary actions to verify the information that you have provided; and the analysis of your tender response being undertaken by one or more third parties commissioned by Kimisitu Sacco Society Ltd for such purposes. Information provided to potential Vendors – Information that is supplied to potential Vendors as part of this Procurement Process is supplied in good faith. The information contained in the RFP and the supporting documents and in any related written or oral communication is believed to be correct at the time of issue but Kimisitu Sacco Society Ltd will not accept any liability for its accuracy, adequacy or completeness and no warranty is given as such. This exclusion does not extend to any fraudulent misrepresentation made by or on behalf of Kimisitu Sacco Society Ltd.
	4. Potential Vendors to make their own enquires – You are responsible for analysing and reviewing all information provided to you as part of this Procurement Process and for forming your own opinions and seeking advice as you consider appropriate. You should notify Kimisitu Sacco Society Ltd promptly of any perceived ambiguity, inconsistency, or omission in this RFP and/or any in of its associated documents and/or in any information provided to you as part of this Procurement Process
	5. Amendments to the RFP – At any time prior to the Response Deadline, Kimisitu Sacco Society Ltd may amend the RFP. Any such amendment shall be issued to all potential
	6. Vendors, and if appropriate to ensure potential Vendors have reasonable time in which to take such amendment into account, the Response Deadline shall, at the discretion of Kimisitu Sacco Society Ltd, be extended.
	7. **Compliance of tender response submission** – Any goods and/or services offered should be based on and Financial (Sacco) in accordance with the RFP (including, without limitation, any specification of Kimisitu Sacco Society Ltd.’s requirements, these Tender Conditions, and the Contract) and all other documents and any clarifications or updates issued by Kimisitu Sacco Society Ltd as part of this Procurement Process.
	8. Format of tender response submission – Tender responses must comprise the relevant documents specified by Kimisitu Sacco Society Ltd completed in all areas and in the format as detailed by Kimisitu Sacco Society Ltd in Annex (Vendor Response). Any documents requested by Kimisitu Sacco Society Ltd must be completed in full. It is, therefore, important that you read the RFP carefully before completing and submitting your tender response.
2. **Modifications to tender response documents once submitted** – You may modify your tender response prior to the Response Deadline by giving written notice to Kimisitu Sacco Society Ltd. Any modification should be clear and submitted as a complete new tender response in accordance with Annex (Vendor Response) and these Tender Conditions.
	1. Rejection of tender responses or other documents – A tender response or any other document requested by Kimisitu Sacco Society Ltd may be rejected which:
3. contains gaps, omissions, misrepresentations, errors, uncompleted sections, or changes to the format of the tender documentation provided.
4. contains handwritten amendments which have not been initiated by the authorized signatory.
5. does not reflect and confirm full and unconditional compliance with all of the documents issued by Kimisitu Sacco Society Ltd forming part of the RFP.
6. contains any caveats or any other statements or assumptions qualifying the tender response that are not capable of evaluation in accordance with the evaluation model or requiring changes to any documents issued by Kimisitu Sacco Society Ltd in any way; is not submitted in a manner consistent with the provisions set out in this RFP; Is received after the Response Deadline.

6.2.0 Disqualification – If you breach these Tender Conditions, if there are any errors, omissions or material adverse changes relating to any information supplied by you at any stage in this Procurement Process, if any other circumstances set out in this RFP, and/or in any supporting documents, entitling Kimisitu Sacco Society Ltd to reject a tender response apply and/or if you or your appointed adviser’s attempt:

1. to inappropriately influence this Procurement Process.
2. to fix or set the price for goods or services.
3. to enter an arrangement with any other party that such party shall refrain from submitting a tender response.
4. to enter any arrangement with any other party (other than another party that forms part of your consortium bid or is your proposed sub-contractor) as to the prices submitted; or
5. to collude in any other way
6. to engage in direct or indirect bribery or canvassing by you or your appointed advisers in relation to this Procurement Process; or
7. to obtain information from any of the employees, agents, or advisors of Kimisitu Sacco Society Ltd concerning this Procurement Process (other than as set out in these Tender Conditions) or from another potential Vendor or another tender response,

6.3.0 Kimisitu Sacco Society Ltd shall be entitled to reject your tender response in full and to disqualify you from this Procurement Process. Subject to the “Liability” Tender Condition below, by participating in this Procurement Process you accept that Kimisitu Sacco Society Ltd shall have no liability to a disqualified potential Vendor in these circumstances.

* 1. Tender costs – You are responsible for obtaining all information necessary for preparation of your tender response and for all costs and expenses incurred in preparation of the tender response. Subject to the “Liability” Tender Condition below, you accept by your participation in this procurement, including without limitation the submission of a tender response, that you will not be entitled to claim from Kimisitu Sacco Society Ltd any costs, expenses or liabilities that you may incur in tendering for this procurement irrespective of whether or not your tender response is successful.
	2. Rights to cancel or vary this Procurement Process - By issuing this RFP, entering into clarification communications with potential Vendors or by having any other form of communication with potential Vendors, Kimisitu Sacco Society Ltd is not bound in any way to enter into any contractual or other arrangement with you or any other potential Vendor.
	3. It is intended that the remainder of this Procurement Process will take place in accordance with the provisions of this RFP but Kimisitu Sacco Society Ltd reserves the right to terminate, amend or vary (to include, without limitation, in relation to any timescales or deadlines) this Procurement Process by notice to all potential Vendor in writing. Subject to the “Liability” Tender Condition below, Kimisitu Sacco will have no liability for any losses, costs or expenses caused to you because of such termination, amendment or variation.
	4. Consortium Members and sub-contractors – It is your responsibility to ensure that any staff, consortium members, sub-contractors and advisers abide by these Tender Conditions and the requirement of this RFP.
	5. Liability – Nothing in these Tender Conditions is intended to exclude or limit the liability of Kimisitu Sacco Society Ltd in relation to fraud or in other circumstances where Kimisitu Sacco

Society Ltd.’s liability may not be limited under any applicable law.

1. **Confidentiality and Information Governance**
	1. All information supplied to you by Kimisitu Sacco Society Ltd, including this RFP and all other documents relating to this Procurement Process, either in writing or orally, must be treated in confidence and not disclosed to any third party (save to your professional advisers, consortium members and/or sub-contractors Financial (Sacco) for the purposes only of helping you to participate in this Procurement Process and/or prepare your tender response) unless the information is already in the public domain or is required to be disclosed under any applicable laws.
	2. You shall not disclose, copy or reproduce any of the information supplied to you as part of this Procurement Process other than for the purposes of preparing and submitting a tender response. There must be no publicity by you regarding the Procurement Process or the future award of any contract unless Kimisitu Sacco Society Ltd has given express written consent to the relevant communication.
	3. This RFP and its accompanying documents shall remain the property of Kimisitu Sacco Society Ltd and must be returned on demand.
	4. Kimisitu Sacco Society Ltd reserves the right to disclose all documents relating to this Procurement Process, including without limitation your tender response, to any employee, third party agent, adviser or other third party involved in the procurement in support of, and/or in collaboration with, Kimisitu Sacco Society Ltd. Kimisitu Sacco Society Ltd further reserves the right to publish the Contract once awarded and/or disclose information in connection with Vendor performance under the Contract in accordance with any public sector transparency policies (as referred to below). By participating in this Procurement Process, you agree to such disclosure and/or publication by Kimisitu Sacco Society Ltd in accordance with such rights reserved by it under this paragraph.
	5. You should be aware of Kimisitu Sacco Society Ltd obligations and responsibilities under the Disclosure Obligations to disclose information held by Kimisitu Sacco Society Ltd. Information provided by you in connection with this Procurement Process, or with any contract that may be awarded as a result of this exercise, may therefore have to be disclosed by Kimisitu Sacco Society Ltd under the Disclosure Obligations, unless Kimisitu Sacco Society Ltd decides that one of the statutory exemptions under the FOIA or the EIR applies.
	6. If you wish to designate information supplied as part of your tender response or otherwise in connection with this tender exercise as confidential, using any template and/or further guidance provided at Part (Submission Checklist) of Annex (Vendor Response), you must provide clear and specific detail as to:
2. the precise elements which are considered confidential and/or commercially sensitive.
3. The estimated length of time during which the exemption will apply.
	1. The use of blanket protective markings of whole documents such as “commercial in confidence” will not be sufficient. By participating in this Procurement Process, you agree that Kimisitu Sacco Society Ltd should not and will not be bound by any such markings.
	2. In addition, marking any material as “confidential” or “commercially sensitive” or equivalent should not be taken to mean that Kimisitu Sacco Society Ltd accepts any duty of confidentiality by virtue of such marking. You accept that the decision as to which information will be disclosed is reserved to Kimisitu Sacco Society Ltd, notwithstanding any consultation with you or any designation of information as confidential or commercially sensitive or equivalent you may have made. You agree, by participating further in this Procurement Process and/or submitting your tender response, that all information is provided to Kimisitu Sacco Society Ltd on the basis that it may be disclosed under the Disclosure Obligations if Kimisitu Sacco Society Ltd considers that it is required to do so and/or may be used by Kimisitu Sacco Society Ltd in accordance with the provisions provision of this RFP.
	3. Tender responses are also submitted on the condition that the appointed Vendor will only process personal data (as may be defined under any relevant data protection laws) that it gains access to in performance of this Contract in accordance with Kimisitu Sacco Society
	4. Ltd ’s instructions and will not use such personal data for any other purpose. The contracted Vendor will undertake to process any personal data on Kimisitu Sacco Society Ltd behalf in accordance with the relevant provisions of any relevant data protection laws and to ensure all consents required under such laws are obtained.

# Tender Validity

Your tender response must remain open for acceptance by Kimisitu Sacco Society Ltd for a period of 150 days from the Response Deadline. A tender response not valid for this period may be rejected by Kimisitu Sacco Society Ltd.

# Mandatory Requirements / Constraints

As part of your tender response, you must confirm that you meet the mandatory requirements / constraints, if any, as set out in Kimisitu Sacco Society Ltd.’s specification forming part of this RFP. A failure to comply with one or more mandatory requirements or constraints shall entitle Kimisitu Sacco Society Ltd to reject a tender response in full.

# Qualification Requirements

As part of your tender response, you must confirm compliance with any qualification requirements as set out at Annex (Qualification Questionnaire). A failure to comply with one or more such qualification requirements shall entitle Kimisitu Sacco Society Ltd to reject a tender response in full.

**SECTION 2 (B). DATA SHEET**

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| **Reference** | **PARTICULARS OF APPENDIX TO INSTRUCTIONS TO TENDERS**  |
| **A. General Provisions**  |
| 1(j)  | Mode of Tender Submission: ***Electronic via www.srmhub.com*** |
| 2.1  | Name of the Procuring Entity: ***KIMISITU SACCO SOCIETY LTD*** The consultant selection method is: **QUALITY AND COST BASED SELECTION** **METHOD (QCBS)**  |
| 2.2  | Financial Proposal to be submitted together with Technical Proposal in separate envelopes: **YES** The name of the assignment is: **TENDER FOR PROVISION OF CONSULTANCY** **SERVICES FOR THE REVIEW OF THE STRATEGIC PLAN 2021 -2023 AND THE STRATEGIC PLAN FOR THE PERIOD 2024 - 2026**  |
| 2.3  | A pre-proposal conference will be held ***PRE-PROPOSAL CONFERENCE WILL NOT BE HELD***  |
| 2.4  | The Procuring Entity will provide the following inputs, project data, reports, etc. to facilitate the preparation of the Proposals: ***NOT APPLICABLE***  |
| 4.1  | *[If “Unfair Competitive Advantage” applies to the selection, explain how it is mitigated, including listing the reports, information, documents, etc. and indicating the sources where these can be downloaded or obtained by the Consultants]-* ***NOT APPLICABLE***  |
| 6.2  | Maximum number of members in the Joint Venture (JV) shall be: ***TWO*** |
| **B. Preparation of Proposals** |
| 10.1  | The Proposal shall comprise the following: Envelope with the Technical Proposal: Power of Attorney to sign the Proposal TECH-1: Technical Proposal Submission Form TECH-2: Consultant’s references TECH-3: Comments and Suggestions of consultant in the Terms of References. TECH-4: Description of Approach, Methodology and Work plan for performing the assignment TECH-5: Work Schedule and Planning for Deliverables TECH-6: Team Composition, Assignment, and Key Experts’ Input TECH-7: Mandatory Documentary Evidence  |

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| **ITC**  | **PARTICULARS OF APPENDIX TO INSTRUCTIONS TO TENDERS**  |
|  |  AND 2nd Inner Envelope with the Financial Proposal: 1. FIN-1: Financial Proposal Submission Form
2. FIN-2: Summary of Costs
3. FIN-3: Breakdown of Remuneration
4. FIN-4: Breakdown of Reimbursable Expenses
 |
| 11.1  | Participation of Sub-consultants, and Key Experts in more than one Proposal is ***NOT*** ***PERMISSIBLE*** |
| 12.1 | Proposals must remain valid for ***150 DAYS*** after the proposal submission deadline.  |
| 13.1  | Clarifications may be requested not later than ***SEVEN DAYS*** prior to the submission deadline. The contact information for requesting clarifications is: ***Head of Procurement*** E-mail: ***procurement@kimisitusacco.co.ke*** |
| 14 (d)  | Key Experts shall not appear in more than one proposal: ***YES*** |
| 16.4  | The Financial Proposal shall be stated in the following currencies: KENYA SHILLINGS Consultant may express the price for their Services in any fully convertible currency, singly or in combination of up to three foreign currencies. NOT APPLICABLE The Financial Proposal should state local costs in **KENYA SHILLINGS:** ***YES***  |
| **C. Submission, Opening and Evaluation**  |
| 17.1  | The Consultants have the option of submitting their Proposals electronically.  |
| 17.5   | The Consultant must submit: 1. Technical Proposal:
2. Financial Proposal:
 |
| 18.5  | The Proposals must be submitted no later than: Date: **15th December 2022 at 2.30 pm**Time: ***2.30 PM EAST AFRICAN TIME*** The Proposal submission address is:  ***CHIEF EXECUTIVE OFFICER*** ***KIMISITU SACCO SOCIETY LTD*** ***P. O. BOX 10454******NAIROBI 00100***   |
| 20.1  | An online option of the opening of the Technical Proposals is offered: *“The online opening procedure shall be: [describe the procedure for online opening of Technical Proposals.* The opening shall take place at: Street Address: ***VALLEY ROAD*** Floor Number: ***1ST FLOOR AEA PLAZA*** Room number ***AT THE BOARD ROOM*** City: ***NAIROBI***, County: ***NAIROBI***  |
| 22.1  | ***PRELIMINARY AND MANDATORY EVALUATION CRITERIA***

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| **No.**  | **Requirement**  | **Pass/Fail**  |
| 1.  | Attach copy of certificate of Registration/Incorporation  |   |
| 2.  | Attach a copy of Valid Tax Compliance Certificate as at the date of tender opening  |   |
| 3.  | The tender is exclusively reserved to firms that Kenyans own one hundred percent (100%) shares. The bidder must submit a CR12 Form obtained from Attorney General’s office showing the shareholders of the firm  |   |
| 4.  | Audited accounts for the last 3 years (2019, 2020and 2021). An Active ICPAK member **must** certify the Copies of Audited accounts with a valid practicing license number.  |   |
| 5.  | Duly filled and signed technical proposal submission form  |   |
| 6.  | One set of the Request for Proposal (RFP) documents (Original)  |   |
| 7.  | Duly filled and signed certificate of independent proposal determination in the format provided in section IV  |   |
| 8.  | Duly **filled and signed Form SD1 Self declaration** confirming that the person/tenderer is not debarred in the matter of the public procurement and asset disposal act 2015 in the format provided in section IV  |   |
| 9.  | Duly **filled and signed Form SD2 Self Declaration** confirming that the person/tenderer will not engage in any corrupt or fraudulent practice in the format provided in section IV  |   |
| 10 | Firms which have a joint venture agreement MUST attach a duly executed joint agreement, specifying rights and obligation of each party to the joint venture **In case of Joint Ventures,** the Prime/Lead bidder will be evaluated based on the mandatory and financial requirements while all partners will be evaluated at the technical evaluation stage.Written confirmation of authorization of the person signing the tender on behalf of the Tenderer. Attach a duly signed and stamped power of Attorney commissioned by a commissioner of oaths or notary public. |  |

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|  | **PARTICULARS OF APPENDIX TO INSTRUCTIONS TO TENDERS**  |
|  | Bid evaluation shall be based on pass/fail and any bid failing in any of the general pre-qualification (mandatory requirements) will not proceed to the technical capacity evaluation stage.  |
| 22.2     | The Criteria, sub-criteria, and point system for the evaluation of the Technical Proposals:  **i. TECHNICAL CAPACITY EVALUATION** The bidders that will qualify at the mandatory evaluation stage shall be subjected to the technical capacity evaluation. The maximum score attainable at the technical evaluation stage shall be one hundred (100) ) out of hundred (100). Bidders who attain eighty (80) marks and above out of hundred (100) will qualify to proceed to the Financial Evaluation stage.

|  |  |  |
| --- | --- | --- |
|  | ***CRITERIA – Technical evaluation***  | **WEIGHT**  |
| **1**  | **Company Relevant Experience for the Assignment**  |  |
| a  | Number of Strategic Plans developed, and s done in FINANCIAL (SACCO) related organizations. Provide a list of a minimum of three (3) similar assignments carried out in the last seven (7) years indicating the dates and contact persons, name of the organization/company and resource personnel used for each assignment (Score of 2 each per relevant assignment upto a maximum of five assignments.)  | 20 |
| Provide recommendation letters from the firms listed in (a) above (1 mark for each reference letter upto a maximum of three for each assignment letters )  | 6 |
| b  | Years of experience of the firm: Minimum of five years ( Score of 1 mark per year)  | 5  |
| **2**  | **Methodology and Approach**  |  |
| a  | Provide a write-up demonstrating their understanding of the role of Financial (SACCO) sector as an enabler of economic development and socio-economic development in relation to the Mandate of the Sacco | 4  |
| b  | Provide a write-up demonstrating their understanding of recent developments (global, regional, and national) in the Financial (SACCO) sector and familiarity with the Social Development Goals (SDGs) as it relates to the Regulatory Mandate of the Sacco.  | 4  |
| c  | Understanding the ToRs Consultant’s initiatives and comments on the TORs  | 4  |
| d  | Appropriateness/ Completeness of description of Methodology with reference but not limited to following: 1. Next frontier in FINANCIAL (SACCO)s in reference to emerging technologies- 2
2. Facilitation of FINANCIAL (SACCO) infrastructure development - 2
3. Human Resources – s 2
4. Universal Service Obligations and projects roll-out-2
5. Market intelligence and development 2
6. Protection of Public interest goals -2
7. Stakeholder engagement- 2
8. Promotion of Operational Excellence -2
9. Effectiveness of the information/data collection -2
10. Performance Contracting monitoring and evaluation 2
 | 20 |
| e  | Project schedule/work plan, allocation of proposed staff and final report outline should be between 12 -16 weeks). Bidders must breakdown each activity and show the deliverables, duration, and the personnel (based on expertise) involved in each assignment and/or activity. (Deliverable (2 marks), duration (1 mark) and personnel (2 marks).  | 4 |
| 3 | **Human Resource Capacity** |  |
| a | **Team leader** - 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 (SACCO) sector in the country/region. The team leader should be well conversant with Strategic Planning, performance management, , business continuity planning, public sector performance targeting, risk management as well as monitoring & evaluation. The minimum qualification is master’s degree in the relevant fields. Attach detailed CVs as well as academic certificates. This will be marked as follows. 1. 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. (3 marks).
2. At least a master’s degree in either Economics, Strategic Planning, Human resources, Public Policy, or a related social science (2 marks for copy of master’s degree certificate provided).
3. The minimum years of experience should be 10 Years in a relevant field (2 Marks).
4. Demonstrable experience in development of strategic plans (4 marks).
 | 15 |

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|  |  |  |
| --- | --- | --- |
|  |  |  |
| b  | **Key Experts** Education background, qualifications and experience, positions held and duration with the firm. Evidence of adequacy and capability of carrying out the assignment: experience in the FINANCIAL (SACCO) sector, development of Strategic Plans for Public Sector agencies, and performance management systems. Attach detailed CVs as per the prescribed format and academic certificates. 1. 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 and s. ***(2 Marks for each CV submitted and zero for none).***
2. The Experts should comprise of holders of least a degree in: Economics/Business ***(2 Marks)***
3. Have a team composition that have expertise in the following key functions ICT strategy, Human Resources Strategy, Marketing strategy, Credit and products strategy, Investment Strategy, Procurement strategy, Fundraising Strategy Communication ***(5 marks),*** (1 marks). (Attach copies of degree certificates for staff).
4. At least 5 years’ experience in the relevant field for each of the other listed staff (***(1 mark each for each staff (maximum of 5 experts) and zero marks for experience of less than 5 years).***
 | 15 |
| 4  | **Financial Capability**  |  |
|  |

|  |
| --- |
| Prove adequate financial resources to undertake the exercises with average annual turnover of Kshs 5,000,000.00 for 3 years as per audited accounts for 2019, 2020, and 2021.  |
| **Sub- Total**  |

**Total points for the four items in the criteria *=* 100**The minimum technical score (TS) required to pass and proceed to the financial evaluation stage is*: \_\_\_\_80 out of 100\_\_* | **3** |

 |

|  |  |
| --- | --- |
| **ITC**  | **PARTICULARS OF APPENDIX TO INSTRUCTIONS TO TENDERS**  |
| 1.0 | An online option of the opening of the Financial Proposals is offered: ***NOT OFFERED***  |
| 2.0  | For the evaluation, the Procuring Entity will include separate items of: (a) all local identifiable indirect taxes such as sales tax, excise tax, VAT, or similar taxes levied on the contract’s invoices; and (b) all additional local indirect tax on the remuneration of services rendered by experts. If a Contract is awarded, at Contract negotiations, all such taxes will be discussed, finalized using the itemized list and included in the Contract amount as a separate line, also indicating which taxes shall be paid by the Consultant and which taxes are withheld and paid by the Procuring Entity on behalf of the Consultant.  |
| 3.0   | The single currency for the conversion of all prices expressed in various currencies into a single one is:***FOREIGN CURRENCY NOT ALLOWED***  |
| 4.0 (QCBS only)    | The lowest evaluated Financial Proposal (Fm) is given the maximum financial score (Sf) of 100. The formula for determining the financial scores (Sf) of all other Proposals is calculated as following: Sf = 100 x Fm/ F, in which “Sf” is the financial score, “Fm” is the lowest price, and “F” the price of the proposal under consideration. The weights given to the Technical (T) and Financial (P) Proposals are T = 0.8 and P = 0.2 Proposals are ranked according to their combined technical (St) and financial (Sf) scores using the weights (T = the weight given to the Technical Proposal; P = the weight given to the Financial Proposal; T + P = 1) as following: S = St x T% + Sf x P%. The minimum technical score required to pass **is 80 out 100 (80%)*****At the financial evaluation stage, the technical and the financial scores will be calculated based on the formulae provided above, with the firm scoring the highest combined scores being recommended for award of the tender.*** |
| 5.0 | The Standstill Period shall be: ***14 DAYS***The procedures for making a procurement related complaint are detailed in the Public Procurement and Asset Disposal Act and Regulations. If a Consultant wishes to make a procurement related complaint or appeal, the Consultant shall submit its complaint to the Public Procurement Administrative Review Board.  |
| **D. Negotiations and Award**  |
| **ITC**  | **PARTICULARS OF APPENDIX TO INSTRUCTIONS TO TENDERS**  |
| 6.0 | Expected date and address for contract negotiations: Date: ***AS TO BE ADVISED BY THE AUTHORITY***Address: ***VALLEY ROAD***  |
| 7.0  | Expected date for the commencement of the Services ***IS IMMEDIATELY AFTER CONTRACT SIGNING WITH THE CLIENT***  |
| 8.0  | The publication of the contract award information following the completion of the contract negotiations and contract signing will be done as following: The publication will be done within ***14*** days after the contract signing  |

**To proceed to the next stage of evaluation, each vendor must obtain 80%**

# Key background documents and further information

Further relevant background documents / information may be provided to potential Vendors as set out below, as an Annex to this RFP and/or by way of the issue of additional documents / links to additional information / documents. Where no such information / documents are provided, this Section of the RFP will not apply.

Together with all mandatory documents, it is recommended that you submit a summary report that includes the impact of your programmes on staff / organisation.

# Timescales

Subject to any changes notified to potential Vendors by Kimisitu Sacco Society Ltd in accordance with the Tender Conditions, the following timescales shall apply to this Procurement Process:

# Clarification Requests

1. All clarification requests should be submitted to: procurement@kimisitusacco.r.ke Kimisitu Sacco Society Ltd by the Clarification Deadline, as set out in the Timescales section of this RFP. Kimisitu Sacco Society Ltd is under no obligation **to respond to clarification requests received after the Clarification Deadline.**
2. Any clarification requests should clearly reference the appropriate paragraph in the RFP documentation and, to the extent possible, should be aggregated rather than sent individually.
3. Kimisitu Sacco Society Ltd reserves the right to issue any clarification request made by you, and the response, to all potential Vendors unless you expressly require it to be kept confidential at the time the request is made. If Kimisitu Sacco Society Ltd considers the contents of the request not to be confidential, it will inform you and you will have the opportunity to withdraw the clarification query prior to Kimisitu Sacco Society Ltd responding to all potential Vendors.
4. Kimisitu Sacco Society Ltd may at any time request further information from potential Vendors to verify or clarify any aspects of their tender response or other information they may have provided. Should you not provide supplementary information or clarifications to Kimisitu Sacco Society Ltd by any deadline notified to you, your tender response may be rejected in full and you may be disqualified from this Procurement Process

# Evaluation Criteria

You will have your tender response evaluated as set out below:

**Stage 1:** Tender responses will be checked to ensure that they have been completed correctly and all necessary information has been provided. Tenders’ responses correctly completed with all relevant information being provided will proceed to Stage 2. Any tender responses not correctly completed in accordance with the requirements of this RFP and/or containing omissions may be rejected at this point. Where a tender response is rejected at this point it will automatically be disqualified and will not be further evaluated.

**Stage 2:** The completed Qualification Questionnaire *(if used)* will then be reviewed to confirm that the potential Vendor meets all of the qualification criteria set out in the questionnaire. Potential Vendors that meet the qualification criteria will proceed to Stage 3. Potential Vendors that do not meet the qualification criteria set out in the Qualification Questionnaire *(if used)* may be excluded from the Procurement Process at this point. Where a potential Vendor is excluded at this point, its tender response will be rejected in full and not evaluated further and the Vendor will automatically be disqualified from this Procurement Process.

**Stage 3:** If a bidder succeeds in passing Stages 1 and 2 of the evaluation, then it will have its detailed tender response to Kimisitu Sacco Society Ltd requirements evaluated in accordance with the evaluation methodology set out below. Information provided as part of Qualification Questionnaire *(if used)* responses may also be verified part of this stage.

14.2 Award Criteria – Responses from potential Vendors will be assessed to determine the most economically advantages tender using the following criteria and weightings and will be assessed entirely on your response submitted:

14.3 Scoring Model – Tender responses will be subject to an initial review at the start of Stage 3 of the evaluation process. Any tender responses not meeting mandatory requirements or constraints (if any) will be rejected in full at this point and will not be assessed or scored further.

Tender responses not so rejected will be scored by an evaluation panel appointed by Kimisitu Sacco Society Ltd for all criteria other than Commercial using the following scoring model:

|  |  |
| --- | --- |
| **Points**   | **Interpretation**   |
| **10**  | **Excellent** –Overall the response demonstrates that the bidder meets all areas of the requirement and provides all of the areas evidence requested in the level of detail requested. This, therefore, is a detailed excellent response that meets all aspects of the requirement leaving no ambiguity as to whether the bidder can meet the requirement.  |
| **7**   | **Good** –Overall the response demonstrates that the bidder meets all areas of the requirement and provides all of the areas of evidence requested but contains some trivial omissions in relation to the level of detail requested in terms of either the response or the evidence. This, therefore, is a good response that meets all aspects of the requirement with only a trivial level ambiguity due the bidder’s failure to provide all information at the level of detail requested.  |
| **5**  | **Adequate** –Overall the response demonstrates that the bidder meets all areas of the requirement, but not all the areas of evidence requested have been provided. This, therefore, is an adequate response, but with some limited ambiguity as to whether the bidder can meet the requirement due to the bidder’s failure to provide all the evidence requested.  |
| **3**  | **Poor** –The response does not demonstrate that the bidder meets the requirement in one or more areas. This, therefore, is a poor response with significant ambiguity as to whether the bidder can meet the requirement due to the failure by the bidder to show that it meets one or more areas of the requirement.  |
| **0**  | **Unacceptable** –The response is non-compliant with the requirements of the RFP and/or no response has been provided.  |

14.4 Financial Evaluation – Your “Overall Price” (as calculated in accordance with requirements of Annex (Pricing Approach) for the goods and/or services will be evaluated by the evaluation panel for the purposes of the commercial evaluation. Prices must not be subject to any pricing assumptions, qualifications or indexation not provided for explicitly by Kimisitu Sacco Society Ltd as part of the pricing approach. If any prices are expressed as being subject to any pricing assumptions, qualifications or indexation not provided for by Kimisitu Sacco Society Ltd as part of the pricing approach, Kimisitu Sacco Society Ltd may reject the full tender response at this point. Kimisitu Sacco Society Ltd may also reject any tender response where the Overall Price for the goods and/or services is considered by Kimisitu Sacco Society Ltd to be abnormally low following the relevant processes set out under the procurement rules. A maximum offer score of

20 will be awarded to the tender response offering the lowest “Overall Price”. Other tender responses will be awarded a mark by application of the following formula: (Lowest Overall Price/Overall Price being evaluated) x 20 (rounded to two decimal places) = commercial score.

14.5 Moderation and application of weightings – The evaluation panel appointed for this procurement will meet to agree and moderate scores for each award criteria. Final scores in terms of a percentage of the overall tender score will be obtained by applying the relevant weighting factors set out as part of the award criteria table above. The percentage scores for each award criteria will be amalgamated to give a percentage score out of 100.

14.6 The winning tender response – The winning tender response shall be the tender response scoring the highest percentage score out of 100 when applying the above evaluation methodology, which is also supported by any required verification evidence (to include, without limitation, any updated information or references relating to any Qualification Question responses) obtained by the Authority relating to any self-certification or other requirements referred to in the Qualification Questionnaire *(if used)*. If any verification evidence requested from a Vendor, or a relevant third party as may be referred to by the Vendor in the Qualification Questionnaire *(if used)* as a party prepared to provide such information, is not provided in accordance with any timescales specified by Kimisitu Sacco Society Ltd and/or any evidence reviewed by Kimisitu Sacco Society Ltd (whose decision shall be final) does not demonstrate compliance with any such requirement, Kimisitu Sacco Society Ltd may reject that tender response in full and disqualify the potential winning Vendor from the Procurement Process at that point.

**List of Annexes forming part of this RFP (issued as separate documents):**

**FORMTECH-7: MANDATORY SUPPORT DOCUMENTS**

*[The Consultant shall use this form to submit all the required support documentary evidence as required in the RFP, especially the mandatory and eligibility criteria specified in the Data Sheet ITC 21.1]*

* 1. **Certificate of Incorporation/Certificate of Registration**

*{Insert here a copy of certificate of incorporation or registration}*

* 1. **Tax Compliance Certificate**

*{Consultant to insert a copy of the tax compliance certificate from Kenya Revenue Authority or similar body in the case of foreign consulting firms}*

* 1. **Practice License or Certificate for the Firm**

*{If required, Consultant to insert a copy of the firm's practice license or registration certificate issued by the professional body specified under Data Sheet ITC 21.1}*

* 1. **Similar Consulting Assignments Experience**

*{Consultant to insert here copies of the form of contract, purchase order, service order, and performance certificate or similar evidence of similar assignments carried out by the firm. The assignments shall be the same as those provided under FORM TECH 2B}*

* 1. **Academic Certificates**

*{Consultant to insert copies of the required relevant academic certificates relevant to the assignment for all the key experts}*

* 1. **Professional Certificates**

*{Consultant to insert copies of professional certificates and relevant short-term trainings to demonstrate professional qualifications for all the key experts}*

* 1. **Professional Membership of Key Experts**

*{If applicable, Consultant to insert copies of professional membership certificate for its key experts}*

* 1. **Certificate of Independent Proposal Determination**

*(The Form is available on Tech FORM TECH-1: TECHNICAL PROPOSAL SUBMISSION FORM).*

**FORM TECH - 8: SELF-DECLARATIONFORMS**

**FORM SD1**

**SELF DECLARATION THAT THE PERSON/TENDERER IS NOT DEBARRED IN THE MATTER OF THE PUBLIC PROCUREMENT AND ASSET DISPOSAL ACT 2015.**

I, ……………………………………., of Post Office Box …….………………………. being a resident of ………………………………….. in the Republic of ……………………………. do hereby make a statement as follows: -

1. THAT I am the Company Secretary/Chief Executive/Managing Director/Principal Officer/Director of ………....……………………………….. (Insert name of the Company) who is a Bidder in respect of

**Tender No. ………………….** for……………………. (Insert tender title/description) for……………………. *(Insert name of the Procuring entity)* and duly authorized and competent to make this statement.

1. THAT the aforesaid Bidder, its directors and subcontractors have not been debarred from participating in procurement proceeding under Part IV of the Act.

1. THAT what is deponed to here in above is true to the best of my knowledge, information and belief.

…………………………………. ………………………………. ……………………… (Title) (Signature)

 (Date)

Bidder Official Stamp

**FORM SD2**

**SELF DECLARATION THAT THE PERSON/TENDERER WILL NOT ENGAGE IN ANY CORRUPT OR FRAUDULENT PRACTICE.**

I, .................................................................... of P. O. Box.....................................................being a resident of

………………………………….. in the Republic of ………………. do hereby make a statement as

follows: -

1. THAT I am the Chief Executive/Managing Director/Principal Officer/Director of……….... ………………………… *(insert name of the Company)* who is a Bidder in respect of **Tender No.**

……………….......................................................….. for ……………………. *(insert tender title/description)* for ……………......................................… *(insert name of the Procuring entity)* and duly authorized and competent to make this statement.

1. THAT the aforesaid Bidder, its servants and/or agents /subcontractors will not engage in any corrupt or fraudulent practice and has not been requested to pay any inducement to any member of the Board, Management, Staff and/or employees and/ or agents of……………………. *(insert name of the Procuring entity)* which is the procuring entity.

1. THAT the aforesaid Bidder, its servants and/or agents /subcontractors have not offered any inducement to any member of the Board, Management, Staff and/or employees and/or agents of……………………. *(name of the procuring entity).*

1. THAT the aforesaid Bidder will not engage /has not engaged in any corrosive practice with other bidders participating in the subject tender.

1. THAT what is deponed to herein above is true to the best of my knowledge information and belief.

…………………………………. (Title) …………………………………….(Signature)……………….(Date)

Bidder Official Stamp

**DECLARATION AND COMMITMENT TO THE CODE OF ETHICS**

I …………………………....................................................................................………. (person) on behalf of ***(Name***

***of the Business/ Company/Firm***) …………………………………………………. declare that I have read and fully understood the contents of the Public Procurement & Asset Disposal Act,2015, Regulations and the Code of Ethics for persons participating in Public Procurement and Asset Disposal Activities in Kenya and my responsibilities under the Code.

I do here by commit to abide by the provisions of the Code of Ethics for persons participating in Public Procurement and Asset Disposal.

Name of Authorized signatory......................................................................................................................

Sign……………......................................................................................................................................

Position…………….................................................................................................................................

Office address………………………………………………. Telephone…………………....…………….

E-mail……………………………………………….........................................................................

Name of the Firm/Company……………………………..............................................................................

Date………………………………………………………............................................................................

***(Company Seal/ Rubber Stamp where applicable)***

Witness

Name ………………………………………………………........................................................................

Sign………………………………………………………...........................................................................

Date……………………………………………………

**FORM TECH - 9: TENDER-SECURING DECLARATION FORM {r 46 and 155(2)}**

[The Bidder shall complete this Form in accordance with the instructions indicated]

Date:...................................................................................*[insert date (as day, month and year)* of Tender

Submission]

Tender No.:...................................................................................*[insert number of tendering process]* To:...................................................................................[insert complete name of Purchaser]

I/We, the undersigned, declare that:

1. I / We understand that, according to your conditions, bids must be supported by a Tender-Securing Declaration.

1. I /We accept that I/we will automatically be suspended from being eligible for tendering in any contract with the Purchaser or the period of time of[insert number of months or years] starting on[insert date],if we are in breach of our obligation (s)under the bid conditions, because we–(a) have withdrawn our tender during the period of tender validity specified by us in the Tendering Data Sheet; or (b) having been notified of the acceptance of our Bid by the Purchaser during the period of bid validity,(i) fail or refuse to execute the Contract, if required, or (ii) fail or refuse to furnish the Performance Security, in accordance with the instructions to tenders.
2. I / We understand that this Tender Securing Declaration shall expire if we are not the successful Tenderer (s), upon the earlier of:
	1. Our receipt of a copy of your notification of the name of the successful Tenderer; or
	2. Thirty days after the expiration of our Tender.
3. I/We understand that if I am /we are/in a Joint Venture, the Tender Securing Declaration must be in the name of the Joint Venture that submits the bid, and the Joint Venture has not been legally constituted at the time of bidding, the Tender Securing Declaration shall be in the names of all future partners as named in the letter of intent.

Signed: ………………………………………………………………….……….

Capacity / title (director or partner or sole proprietor, etc.) Name:

………………………………………………………………………………….

Duly authorized to sign the bid for and on behalf of: ..................................*[insert complete name of*

*Tenderer]* Dated on …………………. day of …………….……. *[Insert date of signing]*

Seal or stamp

**1: FINANCIAL PROPOSAL SUBMISSION FORM**

............................................................... Date}To: ........................................................ [Name and address of Procuring Entity]

Dear Sirs:

We, the undersigned, offer to provide the consulting services for.......................................... [*Insert title of assignment*] in accordance with your Request for Proposal dated................................ *[Insert Date]* and our Technical Proposal. Our attached Financial Proposal is for the amount of............................................. {*Indicate the corresponding to the amount currency*} {*Insert amounts in words and figures*}, including of all taxes in accordance to the Data Sheet. The estimated amount of local taxes is..........................

{*Insert currency*} {*Insert amount in words and figures*}.

{*Please note that all amounts shall be the same as in Form FIN-2}*.

Our Financial Proposal shall be valid and remain binding upon us, subject to the modifications resulting from Contract negotiations, for the period of time specified in the Datasheet.

Commissions and gratuities paid or to be paid by us to an agent or any third party relating to preparation or submission of this Proposal and Contract execution, paid if we are awarded the Contract, are listed below: Name and Address, Amount and Purpose of Commission of Agents, Currency or Gratuity {If no payments are made or promised, add the following statement: “No commissions or gratuities have been or are to be paid by us to agents or any third party relating to this Proposal and Contract execution.”} We understand you are not bound to accept any, Proposal you receive. We remain, Yours sincerely,

Signature................... *(of Consultant's authorized representative) {In full and initials}*: Full name: .................. *{insert full name of authorized representative}* Title: .................. *{insert title/ position of authorized representative}*

Name of Consultant.................. *(company's name or JV's name):* Capacity: .................. *{insert the person's capacity to sign for the Consultant}* Physical Address: .................. *{insert the authorized representative's address}*

Phone: .................. *{insert the authorized representative's phone and fax number, if applicable}* Email: .................. *{insert the authorized representative's email address}*

*{For a joint venture, either all members shall sign or only the lead member/consultant, in which case the power of attorney to sign on behalf of all members shall be attached}*

**2: SUMMARY OF COSTS**

|  |  |
| --- | --- |
| Item  | Cost  |
| {Consultant must state the proposed Costs in accordance with ITC 16.4 of the Data Sheet; delete columns which are not used}  |
|  {*Insert* *Foreign* *Currency # 1*}  | {*Insert* *Foreign* *Currency # 2, if used*}  | {*Insert* *Foreign* *Currency # 3, if used*}  | {*Insert*  *Local* *Currency, if used and/or*  |
| Cost of the Financial Proposal  |   |   |   |   |  |
| Including:  |   |   |   |   |  |
| (1) Remuneration  |   |   |   |   |  |
| (2)Reimbursables |   |   |   |   |  |
| Subtotal [Remuneration + Reimbursables]  |   |   |   |   |  |
| Taxes:  |  |  |
| {insert type of tax. e.g., VAT or sales tax} |   |   |   |   |  |
| {e.g., withholding tax on experts’ remuneration}  |   |   |   |   |  |
| {*insert type of tax*}  |   |   |   |   |  |
| Total Taxes  |   |   |   |   |  |
| Total Cost of the Financial Proposal: {Should match the amount in Form FIN-1}  |   |   |   |   |  |