

**REPUBLIC OF KENYA**



**NATIONAL CONSTITUENCIES DEVELOPMENT FUND KANGUNDO CONSTITUENCY  
STRATEGIC PLAN**

**REQUEST FOR PROPOSAL (RFP) TENDER FOR CONSULTANCY SERVICES**

**TO UNDERTAKE DEVELOPMENT OF NG CDF KANGUNDO STRATEGIC PLAN  
FOR THE PERIOD**

**2023-2027**

**TENDER NO: KANG/CDF/008/2022-2023.**

## **SECTION A: INVITATION TO TENDER**

The NG CDF Kangundo invites sealed proposals from interested eligible firms to tender for consultancy services to undertake the development of the Institution's Strategic Plan for the period 2023-2027.

The RFP tender document containing detailed information on the tender can be accessed and downloaded from NG CDF KANGUNDO Website ([www.ngcdf.go.ke](http://www.ngcdf.go.ke)) and [www.tenders.go.ke](http://www.tenders.go.ke). Interested bidders must arrange to forward their particulars/contacts to the NG CDF Kangundo office before the closing date for records and for the purposes of receiving clarifications and/or addendums, if any. The tender documents are available in our office.

Duly completed request for proposal documents, in a plain sealed envelope marked: **"KANG/CDF/008/2022-2023-REQUEST FOR PROPOSAL FOR CONSULTANCY SERVICES TO UNDERTAKE DEVELOPMENT OF NG CDF KANGUNDO STRATEGIC PLAN FOR THE PERIOD 2023-2027"** should be mailed to the address below or deposited in our tender box at the NG CDF Kangundo office on or before 05<sup>th</sup> June 2023 at 10.00 am.

**Fund Account Manager**  
**NG CDF KANGUNDO**  
**P.O. Box 1035-90115 Kangundo.**

Tenders should be submitted in one envelope with completed technical and financial proposals clearly marked:

- (i) Technical proposal for Consultancy services to undertake development of NG CDF KANGUNDO Strategic plan for the period 2023-2027.
- (ii) Financial proposal for Consultancy to undertake development of NG CDF KANGUNDO Strategic plan for the period 2023-2027.

Tenders will be opened immediately thereafter in the presence of bidders or bidders' representatives who choose to attend at NG CDF Kangundo office.

## **SECTION B: INFORMATION TO CONSULTANTS**

### **1. Introduction**

The NG CDF Kangundo 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, a list of services and facilities to be provided by the Client.
- ii. A description of the methodology and work plan for performing the assignment.
- iii. The list of the proposed staff team by specialty, the tasks that would be assigned to each staff team member and their timing.
- iv. CV of the consultant
- v. Estimates of the total staff input (professional and support staff-time) needed to carry out the assignment.
- vi. A detailed description of the proposed methodology, staffing and monitoring of training.

The Technical Proposal shall not include any financial information.

**Financial Proposal**

The Financial Proposal should clearly identify as a separate amount, the local taxes, duties, fees, levies, and other charges imposed under the law on the consultants, the sub consultants and their personnel.

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

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

**Submission Proposals**

The completed Technical and Financial Proposals must be delivered at the submission address on or before the time and date stated. Any proposal received after the closing time for submission of proposals shall be returned to the respective consultant unopened.

After the deadline for submission of proposals, the Technical Proposal shall be opened immediately by the evaluation committee. The Financial Proposal shall remain sealed and deposited with a responsible officer of the client department.

## **EVALUATION CRITERIA**

### **(a) Mandatory Criteria**

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

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

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

### **(b) Technical Capacity Evaluation**

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

- i. At least a master's degree in a relevant field in the area of planning, public policy, development studies
- ii. At least five years professional experience in strategic planning, management research and policy development,
- iii. Prior working experience on decentralization issues is an added advantage
- iv. Demonstrated experience in working with stakeholders in not-for-profit sector development programs especially in the area of capacity development
- v. Highly motivated and committed to the values of transparency and integrity;
- vi. Skills in facilitation of stakeholder engagements/workshops;
- vii. Evidence of having undertaken similar assignments;

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

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

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

### (c) Financial Evaluation

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

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

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

Work Description	Amount (Kshs)
Consultancy Fees for developing the Strategic plan 2023-27	
Miscellaneous expenses	
Disbursements (if any)	
<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

Work Description	Percentage (%)	Amount (Kshs)
Presentation of inception report for approval		
Presentation of draft final strategic plan 2023-2027 to management. Payment upon acceptance of the draft final strategic plan 2023-2027.		
Submission, approval, and acceptance of the comprehensive strategic plan 2023-2027		
<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 in Appendix “A”.

## APPENDIX “A”

### Clause Reference

- 1.1 The name of the Client is: **NG CDF KANGUNDO**  
The method of selection is: Quality Cost Based Selection (QCBS)
- 1.2 Technical and Financial Proposals are requested: Yes  
The name, objectives, and description of the assignment are: AS PER  
THE TERMS OF REFERENCE.
- 1.3 Pre-proposal conference will be held: No
- 1.4 The Client will provide the following inputs: **ANY INFORMATION  
REQUIRED**
- 3.3 The minimum required experience of proposed professional staff is:  
**FIVE YEARS AND ABOVE.**
- 3.4 Training is a specific component of this assignment: Yes  
Additional information in the Technical Proposal includes: N/A
- 3.7 Taxes: All taxes to be included in the financial proposal.
- 4.2 The proposal submission address is as shown below. Information on the  
outer envelope should also include: Tender number and consultancy.
- 4.3 Proposals must be submitted no later than 03<sup>rd</sup> June 2023, 10.00 am.  
The address to send information to the Client is:  
**Fund Account Manager  
NG CDF Kagundo  
P.O Box 1035-90115  
KANGUNDO**  
The minimum technical score required to pass is 70/100  
The assignment is expected to commence after signing the contract

**SECTION C: - TECHNICAL PROPOSAL – STANDARD FORMS**

These forms shall include;

- i) Technical Proposal submission form.
- ii) Firm’s references.
- iii) Comments and suggestions of consultants on the Terms of Reference and on data, services and facilities to be provided by the Client.
- iv) Description of the methodology and work plan for performing the assignment.
- v) Team composition and task assignments.
- vi) Format of curriculum vitae (CV) for proposed professional staff.
- vii) Time schedule for professional personnel.
- viii) Activity (work) schedule.

**(i). TECHNICAL PROPOSAL SUBMISSION FORM**

[ \_\_\_\_\_ *Date*]

To: \_\_\_\_\_ [*Name and address of Client*]

Ladies/Gentlemen:

We, the undersigned, offer to provide the consulting services for strategic plan in accordance with your Request for Proposal dated \_\_\_\_\_ [*Date*] and our Proposal. We are hereby submitting our Proposal, which includes this Technical Proposal, [and a Financial Proposal sealed under a separate envelope.

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

Yours sincerely,

\_\_\_\_\_ [*Authorized Signature*]:

\_\_\_\_\_ [*Name and Title of Signatory*]

\_\_\_\_\_ [*Name of Firm*]

\_\_\_\_\_ [*Address:*]

**(ii) FIRM'S REFERENCES**

**Relevant Services Carried Out in the Last Five Years  
That Best Illustrate Qualifications**

Using the format below, provide information on each assignment for which your firm either individually as a corporate entity or in association was legally contracted.

Assignment Name:	Country
Location within Country:	Professional Staff provided by your Firm/Entity (profiles):
Name of Client:	No. of Staff:
Address:	No. of Staff- Days/Months (Duration of Assignment):
Start Date (Month/Year):	Approx. Value of Services (Kshs):
Completion Date (Month/Year):	
Name of Associated Consultants (If any):	No. of days/ months of Professional Staff Provided by Associated Consultants:
Name of Senior Staff (Project Director/Coordinator, Team Leader) Involved and Functions Performed:	

Narrative Description of project:

Description of Actual Services Provided by Your Staff:

Firm's Name: \_\_\_\_\_

Name and title of signatory; \_\_\_\_\_

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

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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**

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**(v). TEAM COMPOSITION AND TASK ASSIGNMENTS**

**1. Technical/Managerial Staff**

<b>Name</b>	<b>Position</b>	<b>Task</b>	

**2. Support Staff (if any)**

<b>Name</b>	<b>Position</b>	<b>Task</b>	

**(vi). FORMAT OF CURRICULUM VITAE (CV) FOR PROPOSED PROFESSIONALSTAFF**

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: \_\_\_\_\_

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**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].*

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**Education:**

*[Summarize college/university and other specialized education of staff member, giving names of schools, dates attended and degree[s] obtained.]*

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**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.]*

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**Certification:**

I, the undersigned, certify that these data correctly describe me, my qualifications, and my experience.

\_\_\_\_\_ Date:

*[Signature of staff member]*

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Date; \_\_\_\_\_

*[Signature of authorized representative of the firm]*

Full name of staff member: \_\_\_\_\_

Full name of authorized representative: \_\_\_\_\_

**(Vii) TIME SCHEDULE FOR PROFESSIONAL PERSONNEL**

Name	Position	Reports Due/Activities	Number of weeks											
			1	2	3	4	5	6	7	9	10	11	12	

Reports Due: \_\_\_\_\_

Activities Duration: \_\_\_\_\_

Signature: \_\_\_\_\_

(Authorized representative)

Full Name: \_\_\_\_\_

Title: \_\_\_\_\_

Address: \_\_\_\_\_

**(viii). ACTIVITY (WORK) SCHEDULE**

**(a). Field Investigation and Study Items**

Activity (Work)	1st	2nd	3rd	4th	5th	6th	7th	8th	9th	10th	11th	12th

*\* [1<sup>st</sup>, 2<sup>nd</sup>, etc, are weeks from the start of assignment)*

**(b). Completion and Submission of Reports**

Reports	Date
1. Inception Report	
2. Interim report comprising of a Draft Final Strategic plan 2023-27	
3. Workshop/stakeholders status reports	
4. Final Report comprising of: A Strategic plan 2023-27; 5-year action implementation matrix; and automated M&E framework	

**SECTION D: - FINANCIAL PROPOSAL – STANDARD FORMS**

These forms shall include:-

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

**(i). FINANCIAL PROPOSAL SUBMISSION FORM**

[ Date] \_\_\_\_\_

To: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_ [Name and address of Client]

Ladies/Gentlemen:

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

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

We remain,

Yours sincerely,

\_\_\_\_\_ [Authorized Signature]

\_\_\_\_\_ [Name and Title of Signatory]:

\_\_\_\_\_ [Name of Firm]

\_\_\_\_\_ [Address]

**(ii). SUMMARY OF COSTS**

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

**SECTION E: - TERMS OF REFERENCE FOR DEVELOPING THE NG CDF  
KANGUNDO STRATEGIC PLAN FOR 2023-27**

**1.0 OVERVIEW**

**1.1 About NG CDF**

The National Government Constituency Development Fund (NG CDF) was established under NG CDF Act 2015 and Rules and regulations 2015. It targets all constituency-level National government development projects, particularly those aiming to combat poverty at the grassroots. The fund comprises an annual budgetary allocation equivalent to 2.5% of the government's ordinary revenue. 75% of the fund is allocated equally amongst all 290 constituencies. A maximum 35% of each constituency's annual allocation may be used for an education bursary scheme. NG CDF is managed through committees.

**1.2 About Kangundo**

**Kangundo Constituency** is IEBC number 077 electoral constituency in Kenya. It is one of the constituencies in IEBC number 016 Machakos County, split from Matungulu Constituency. Its main town Kangundo is a division in Kangundo District. Kangundo constituency has a population of about 94,367 people and covers an area of approximately 177 Sq. Km.

Kangundo has the following wards:-

Ward No.	Ward	Ward Population	Ward Area In Sq. Km	Ward Locations Description
0381	North ward	22,396	37.30	Comprises Kawauni, Kikambuani, Mbilini, Ndunduni, Kitwii
0382	Central ward	24,850	31.90	Comprises Isinga, Maiuni, Muisuni, Matetani
0383	East Ward	21,509	53.00	Comprises Iia Itune, Kathome, Katitu, Miu, Nyamuti, Kavilinguni
0384	West Ward	25,612	55.10	Comprises Kakuyuni, Kithingoni, Kaweithei, Kyevaluki, Mbusyani, Mukunike, Kathaana

NG CDF Kangundo is looking for a consultant who will work closely with the NG CDF Kangundo Secretariat to facilitate the process of reviewing NG CDF Kangundo current strategic framework and identifying new and ambitious goals and objectives for the period 2023-2027. This assignment will involve close engagement with the internal NG CDF Kangundo Strategic Planning Team (comprising of the Fund Manager, NG CDF Chairperson, the Manager Strategy and Development, and a team of other selected staff) and entail a participatory process, including, but not limited to:

- i. A review of internal documents and benchmark with similar institutions/ organizations
- ii. Consultations with NG CDF Kangundo senior management and staff and selected partners/stakeholders to review the current plan and set priorities for the next plan

- iii. Facilitation of a strategic planning workshop for staff, board members and selected stakeholders to further build on the Strategic plan
- iv. Drawing up of a draft Strategic Plan for the next phase and incorporating input from NG CDF KANGUNDO staff, Board and selected stakeholders and partners.

### **1.3 Objectives**

The main objective of this consultancy is to develop a new strategic framework for NG CDF KANGUNDO that takes into account the current internal and external operating environment to enhance NG CDF KANGUNDO's effectiveness and sustainability in its daily operations of delivering services to its constituents.

### **1.4 Specific Objectives of the consultancy**

To build on the achievements brought forward as part of the implementation of NG CDF Kangundo 2023- 2027 Strategic Plan and cognizant of its ever-changing operating environment, the consultant will review and guide NG CDF Kangundo in clearly defining: - NG CDF Kangundo Vision, Mission, strategic areas and objectives; including priority focus areas for the strategic period

- i. NG CDF KANGUNDO situational context, through a SWOT, PEST and other relevant analysis.
- ii. Sustainability plan; including proposals for effective financial and Human resource strategies
- iii. NG CDF Kangundo stakeholder map and identify relevant strategies to engage them to advance our stated objectives, stakeholder and
- iv. Monitoring and reporting framework to enable effective tracking of the strategic plan
- v. Costing of the plan.

## **2.0 SCOPE AND METHODOLOGY**

The scope and focus of the assignment are to provide technical, strategic, and facilitation support to enable the renewal of NG CDF Kangundo strategic framework. While the consultant is at liberty to propose his/her methodology that would adequately result in the expected deliverables outlined in this ToR, the following four steps are suggested as a basis for the strategic plan development process.

### **Step One: Prepare**

- i. Inception workshop with NG CDF Kangundo Secretariat to discuss scope, methodology and timeline;
- ii. Inception report outlining the key steps/methodology with specific deliverables and timeline; contextual analysis.

### **Step Two: Review, Assess and Analyse**

- i. Participatory process of critical reflection, analysis and consultation (SWOT analysis);
- ii. Review of relevant organizational documents (vision, mission statement, theory of change, Business Plan, etc.);
- iii. Interviews with NG CDF KANGUNDO secretariat; - assessment report outlining critical issues, contextual analysis, gaps to be addressed and opportunities to grab.

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

- i. Analyse feedback from the different sources (as outlined in step-2);
- ii. Formulate strategic framework - guided by the following questions:
  - a. Where does NG CDF KANGUNDO want to be in 2026?
  - b. What does NG CDF KANGUNDO want to achieve during this timeline?
  - c. How would NG CDF KANGUNDO work to deliver its training and capacity building goals?
  - d. How will NG CDF KANGUNDO get there?
  - e. What might go wrong for NG CDF KANGUNDO in the dynamic business environment?
  - f. And how would NG CDF KANGUNDO avoid this?
  - g. How will NG CDF KANGUNDO know when we get there? (measure of success)
  - h. How will NG CDF KANGUNDO monitor lessons learnt and integrate that learning into successive plans and strategies?

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

- i. Draft the text around the key objectives;
- ii. Consult widely on draft new strategic framework;
- iii. NG CDF KANGUNDO formally approves the final document;
- iv. Dissemination and implementation of the Strategic Plan.

### **3.0 EXPECTED DELIVERABLES**

- i. An inception report detailing the methodology/ approaches and timelines associated with this consultancy assignment
- ii. A needs assessment report highlighting the current status and gaps in NG CDF KANGUNDO strategic direction, covering both internal and external factors relevant to the organizational operating environment.
- iii. A two day strategic planning workshop for the NG CDF KANGUNDO Staff, Board and selected partners
- iv. A revised strategic plan incorporating all the feedback from the stakeholders.
- v. A consultancy report that includes the major activities of the consultancy, the highlights of the strategic planning workshop and an evaluation of the workshop

### **4.0 CONSULTANCY DURATION**

The strategic planning exercise is expected to be fully completed by 31<sup>st</sup> August 2023 and the whole process will last for only one month.

### **5.0 SUPERVISION OF THE WORK**

This consultancy assignment will be supervised by NG CDF KANGUNDO's Fund Account Manager with the support of the NG CDF KANGUNDO Strategic Planning team.

### **6.0 CONFIDENTIALITY OF INFORMATION**

All documents and data collected in the process of the consultancy will be treated as confidential and used solely to facilitate the consultancy assignment. All information to which the consultant shall receive access to shall at all times be treated as the property of NG CDF KANGUNDO and shall not be disclosed saved for where express permission has been granted as such.

**THE END**

