

# Balozi Co-operative Savings and Credit Society Ltd.



Golf View Suite, 3rd Floor, Wambui road off Kiambu/Thika road  
P.O. Box 11539 – 00400, Nairobi, Kenya.  
Tel: 020-2211600 Cell: 0720-833326/0733-967707  
Email: info@balozisacco.com Website: www.balozisacco.com

Invest in secure hands

25<sup>th</sup> September 2024

Dear Sir/Madam,

## **REQUEST FOR PROPOSAL FOR PROVISION OF CONSULTANCY SERVICES FOR THE DEVELOPMENT OF A STRATEGIC PLAN FOR THE PERIOD 2025-2029**

### **A) BACKGROUND**

Balozi SACCO Ltd is a non-withdrawable deposit taking (NWDT) Tier 1 Sacco formed in 1975 under the Co-operative Society Act and is regulated by Sacco Societies Regulatory Authority (SASRA). The Sacco has its offices at Golf view suites, 3rd floor, Wambui road, Muthaiga, Nairobi. It draws its members from American Embassy, Canadian High Commission, USAID, Center for Disease Control, British Broadcasting Corporation, Kenya Medical Research Institute, amongst others.

Balozi SACCO's main core function is to mobilize savings from its members and grant loans to the same members at competitive interest rates.

The Sacco intends to develop a strategic plan to guide its operations for the period 2025-2029.

Summary of the statistical information about Balozi Sacco as of 30<sup>th</sup> June 2024.

<b>Account Name</b>	<b>Statistics</b>
Total assets	5.6B
Total loans	4.8B
Total deposit	3.8B
Share capital	273M
Total income	379M
Total membership	4,670
Total staff	13

*The consultant will be expected to have an entry and exit meeting with Balozi team to discuss scope, methodology and timeline.*

### **B) OBJECTIVES**

The main objective of this consultancy is to develop a new strategic plan for Balozi Sacco Limited that considers the current internal and external operating environment to enhance Sacco's effectiveness and sustainability around savings and credit in Kenya.

The consultant will guide the Sacco clearly in defining the following:

1. Vision, mission, strategic areas and objectives; including priority focus areas for the strategic period
2. Situational context, through a SWOT and any other relevant analysis.
3. Sustainability plan which will include proposals for effective financial and human resource strategies
4. Stakeholder map and identify relevant strategies for engaging them to advance the stated objectives.
5. Monitoring and reporting framework to enable effective tracking of the strategic plan.

### **C) DELIVERABLES**

1. An inception report detailing the methodology/approaches and timelines associated with this consultancy assignment.
2. A report highlighting the current status and gaps in the Sacco strategic direction, covering both internal and external factors relevant to the organizational operating environment.
3. A report that includes the major activities of the consultants, the highlights of the strategic planning workshop and an evaluation of the workshop.
4. A revised strategic plan incorporating all the feedback from the stakeholders.
5. Any other relevant deliverables not included above.

### **D) TECHNICAL PROPOSAL**

The consultant should in detail describe the methodology/approaches and timelines associated with this consultancy assignment. A project work plan should be given with deliverables.

#### **Key Personnel qualifications**

##### **Team leader**

1. The team leader should be well conversant with strategic planning, performance management, business continuity planning, performance targeting, management research ,risk management as well as monitoring & evaluation. The team leader should demonstrate the capability in carrying out the assignment and should include and not limited to education qualification, training experience and experience in development of strategic plans amongst others.
2. The minimum qualification is a master's degree in strategic planning or business field. Must attach academic certificates as well as detailed CV.
3. At least 5 years' professional experience in strategic planning, management research, policy development or business-related field.
4. Prior working experience in a Sacco or financial institution is an added advantage.
5. Highly motivated and committed to the values of transparency and integrity.
6. Skills in facilitation of stakeholder engagements/workshops.
7. Evidence of having undertaken similar assignments.

##### **Other key personnel**

1. Evidence of capability of carrying out the assignment which should be supported with documentations.

2. The minimum qualifications to be a bachelor's degree in relevant fields such as Economics, Business, Human Resource, Finance, Communication, ICT or other relevant fields. Must attach academic certificates as well as the CV's.
3. At least 2 years' experience in the relevant field for each of the listed staff.

**E) FINANCIAL PROPOSAL**

- Clear breakdown of the financial proposal including all the chargeable taxes.
- Financial proposal must remain valid for 120 days after the submission date.

**F) TERMS OF PAYMENT**

40% deposit after signing of the contract and balance to be paid after submission of the final document.

**G) PROPOSAL EVALUATION**

**Criteria for evaluation**

<b>Description</b>	<b>Score</b>
Attach certificate of incorporation	Yes/No  Mandatory documents  <b>(Failure to attach any required document will lead to disqualification)</b>
Attach current trade license	
Attach current tax compliant certificate	
A list of shareholders/partners and the directors with contact details. Attach CR12	
Attach written recommendations or proof of engagement from 5 referees for strategic plan development. Give a list of referees and updated contact details.	
Attach academic certificates for key personnel. Minimum of a master's degree in strategic planning, management research, policy development or business-related field.	
Attach a letter in your company letterhead, indicating physical location of the business	
<b>Mark awarding Criteria</b>	
<b>Technical evaluation</b>	
Number of Strategic Plans developed.	25
List five 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 5 marks per assignment). If SACCOs, indicate their asset base.	
Years of experience of the firm: Minimum of 5 years (Score of 1mark per year)	5
Technical proposal detailing methodology, approach and understanding of the scope of work.	20
Key Personnel qualifications <ul style="list-style-type: none"> <li>• Team leader qualifications as per RFP</li> </ul>	8

Duration of consultancy work. Preparation of within 14 days before workshop and submission of final report within 14 days after workshop. (Score of 2 marks if within, else 0)	2
Total	60
<b><i>Tenders must score at least 50% at the technical evaluation stage to progress to the next stage, that is, financial evaluation stage.</i></b>	
<b>Financial Evaluation</b>	
Cost = $CI/Cc \times M$ . Where, <b>CI</b> is Lowest quote received. <b>Cc</b> is the Quote of vendor being evaluated. <b>M</b> is the total score for cost (40 marks)	40
Total	40

## **G. HOW TO APPLY**

Download the requirements by clicking on the following link or alternatively visit Balози SACCO website:

<https://www.balozisacco.com/index.php/tenders>

Interested bidders are expected to write to [tender@balozisacco.com](mailto:tender@balozisacco.com) for any clarification. The SACCO will also provide the answers via the same email used by the vendor.

## **H. CONDITIONS**

1. The SACCO reserves the right to accept or reject any proposal without giving explanations.
2. Any canvassing will lead to automatic cancellation of the submitted proposal.

The above exercise will be done in a workshop in November 2024 for 3 days (Friday to Sunday). The venue will be 92km away from Nairobi. The consultants will be required to cater for their own accommodation and transport during the exercise.

The proposal should be in Kenya shillings and must include applicable taxes, disbursements and all related costs. Quotation to be sealed, marked as “**Proposal for Strategic Plan**” and dropped in the tender box at our offices at Golf View Suites, 3rd Floor, Wambui road - Muthaiga on or before 5.00 pm on **Friday, 11<sup>th</sup> October 2024**.

Soft copy proposals **shall not** be accepted.

Only the successful firm (to be awarded this tender) will be contacted within a month from the closing date above.

Yours Faithfully,



**Jorim Oyago**  
**Chief Executive Officer**