REQUEST FOR PROPOSAL (RFP) TENDER FOR CONSULTANCY SERVICES

TO UNDERTAKE DEVELOPMENT OF IMARIKA DT SACCO SOCIETY LTD STRATEGIC

PLAN FOR THE PERIOD

2027-2031

TENDER NO: IMA/RFP/SP/001/2026.

SECTION A: INVITATION TO TENDER

Imarika DT Sacco Society Ltd invites sealed proposals from interested eligible firms to tender for consultancy services to undertake the development of the Sacco's Strategic Plan for the period 2027 - 2031.

The RFP tender document containing detailed information on the tender can be accessed and downloaded from Imarika DT Sacco Website free of charge(www.imarika.org). Interested bidders must arrange to forward their particulars/contacts to the Procurement officer, Imarika DT Sacco Society Ltd, through email address procurementunit@imarika.org before the closing date for records and for the purposes of receiving clarifications and/or addendums, if any.

Duly completed request for proposal documents, in a plain sealed envelope marked: **"IMA/RFP/001/2026-REQUEST FOR PROPOSAL FOR CONSULTANCY SERVICES TO UNDERTAKE DEVELOPMENT OF IMARIKA DT SACCO SOCIETY LTD STRATEGIC PLAN FOR THE PERIOD 2027-2031"** should be mailed to the address below or deposited in our tender box on 1ST floor Imarika Plaza, along Kenyatta Street, opposite Baobab Plaza, Kilifi on or before **27th July 2026** at 10.00 am.

Chief Executive Officer
Imarika DT Sacco Society Ltd
P.O. Box 712, Kilifi 80108
Tel: +254 793712712
Website: www.imarika.org

The contract will be awarded using the **Quality and Cost-Based Selection (QCBS)** methodology. Tenders should be submitted in two separate envelopes with completed technical and financial proposals clearly marked:

(i) Technical proposal for Consultancy services to undertake development of Imarika DT Sacco Strategic plan for the period 2026-2031.
(ii) Financial proposal for Consultancy to undertake development of Imarika DT Sacco Strategic plan for the period 2026-2031.

Tenders will be opened immediately thereafter in the presence of bidders or bidders' representatives who choose to attend at Imarika DT Sacco Society Ltd Head offices at Imarika plaza, Kilifi.

SECTION B: INFORMATION TO CONSULTANTS

1. Introduction

Imarika DT Sacco Society Ltd 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 (s)
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 strategy, 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: -

	CRITERIA	Score/Point
1	**Relevant Experience for the Assignment (Corporate)**	
a	Number of Strategic Plans developed. List assignments carried out in the last five years specifically with organizations of similar size and sector (e.g., SACCOs or banks) and provide dates and contact persons, name of the organization/company and resource personnel used for each (Score of 4 per successful assignment). Attach reference letters or certificates of completion as proof.	20
b	Years of experience of the firm: Minimum of 5 years(Score of 1 per year)	5
	Sub Total	**25**
2	**Methodology and Approach**	
a	Understanding the Terms of Reference (TOR) • Conformity to the Terms of Reference • Consultant's initiatives and comments on the TORs	15
b	Appropriateness of Methodology • Appropriateness of the methodology for data collection, stakeholder engagement (e.g., conducting surveys, SWOT analysis, and validation workshops), and strategy formulation (e.g., Balanced Scorecard, Theory of Change) • Completeness of description of methodology • Effectiveness of the information collection • Project schedule/work plan, allocation of proposed staff and final report outline	10
	Sub Total	**25**
3	**Human Resource Capacity**	
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 Strategy, 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. A Deep understanding of the local operating context (Kenyan economic landscape, Vision 2030, and relevant regulatory frameworks)	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
	Sub Total	**20**
	Total	**70**

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	**Financial Capability**	
a	Financial Capability: Prove of adequate financial resources to undertake the exercises	**30**
	Total	**30**

Financial proposals of only the technically qualified bidders will be opened. The lowest financial bid (F_{min}) will receive a financial score (S_f) of 100 points.

The financial scores of all other proposals will be calculated as follows:

$$S_f = \left\{ \frac{F_{min}}{F} \right\} \times 100$$

(d) Final ranking and Award

The total combined score (S) will be calculated by applying the weights to the technical and financial scores:

$$S = (S_t \times 0.70) + (S_f \times 0.30)$$

Where.
S_t - Technical score
S_f - Financial score

The bidder achieving the highest total combined score (S) will be invited for contract negotiations.

Tenderers will be expected to quote in Kenya shillings and be inclusive of all applicable local taxes (e.g., VAT and withholding tax).

Work Description	Amount (Kshs)
Consultancy Fees for developing the Strategic plan 2026-31	
Miscellaneous expenses	
Disbursements (if any)	
Total	

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 implementation methodology and contract signing		
Presentation of draft strategic plan 2027-2031 to management. Payment upon acceptance of the draft strategic plan 2027-2031.		
Validation, acceptance and approval of the comprehensive and final strategic plan 2027-2031		
Total		

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**: IMARIKA DT SACCO SOCIETY LTD**

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 **27th July 2026**, 10.00 am.

The address to send information to the Client is:

Chief Executive Officer
Imarika DT Sacco Society Ltd
P.O. Box 712, Kilifi 80108
Tel: +254 793712712

The minimum technical score required to pass is 70/100

The assignment is expected to commence after signing the contract at Imarika Plaza,Kilifi

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): Completion Date (Month/Year):	 Approx. Value of Services (Kshs):
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.

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

(v). TEAM COMPOSITION AND TASK ASSIGNMENTS

1. Technical/Managerial Staff

Name	Position	Task

2. Support Staff (if any)

Name	Position	Task

(Vi). FORMAT OF CURRICULUM VITAE (CV) FOR PROPOSED PROFESSIONAL STAFF

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: ______________________________________

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].

Education:

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

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.]

Certification:

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

____Date:

[Signature of staff member]

____

*Date;*_____________

[*Signature of authorized representative of the firm*]

Full name of staff member: ____

Full name of authorized representative: _____________________________________

(Vii) TIME SCHEDULE FOR PROFESSIONAL PERSONNEL

			Number of weeks										
Name	**Position**	**Reports Due/Activities**	**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**

**[1st, 2nd, 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 Strategic plan 2026-31	
3. Workshop/stakeholders status reports	
4. Final Report comprising of: A Strategic plan 2026-31; 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 IMARIKA DT SACCO STRATEGIC PLAN FOR 2026-31

1.0 OVERVIEW

Imarika DT Sacco Society Ltd is one of the leading tier 1 Saccos in the country registered under the Co-operative societies Act no. 12 of 1997 CAP 490 in 1974 with the mission of uplifting their members well-being through the provision of member-driven affordable savings and credit services. From a humble beginning, we now have our headquarters in Kilifi and branches in Malindi, Mariakani, Mtwapa, Garsen, Ukunda, Kengeleni and Bamba. It currently has a strong and dynamic work force of 130 members of staff.

The society already has an existing **Strategic plan 2022-2026** which has been instrumental in guiding its activities since 2022. However, in appreciating the ever changing and dynamic operating environment, the society wishes to review its Strategic plan with a view of evaluating what has been implemented, understanding its current and foreseeable characteristics of the operating environment so as to develop strategies that will leverage its competitive position.

Imarika DT Sacco now seeks an independent and objective business Consultant who shall undertake the task of guiding the society through the process of strategic planning review in a professional manner to ensure maximum understanding of its operating environment and develop a long-term strategic plan thereof. This assignment will involve close engagement with the internal Strategic Planning Team (comprising of the CEO, the General managers, 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 Imarika DT Sacco 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 of directors 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 Imarika DT Sacco staff, Board of directors and selected stakeholders and partners.

1.1 Objectives

The main objective of this consultancy is to develop a new strategic framework for Imarika DT Sacco that takes into account the current internal and external operating environment to enhance the Sacco's effectiveness and sustainability in the area of provision of savings and credit services in Kenya.

1.2 Specific Objectives of the consultancy

To build on the achievements brought forward as part of the implementation of the Sacco's 2022-2026 Strategic Plan and cognizant of its ever-changing operating environment, the consultant will guide Imarika DT Sacco:

i. To review and evaluate the current strategic plan 2022-2026 with a view of establishing the extent of its implementation
ii. To review/develop the Vision, Mission, strategic areas and objectives; including priority focus areas for the strategic period
iii. To develop a new Sacco situational context, through a SWOT, PESTEL and/or other relevant analysis techniques.
iv. To develop a Sustainability plan; including proposals for effective financial and Human resource strategies
v. To develop a stakeholder map and identify relevant strategies to engage them to advance our stated objectives, stakeholder
vi. To develop an implementation matrix that will guide the Sacco in the next 5 years
vii. Monitoring and reporting framework to enable effective tracking of the strategic plan
viii. 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 Imarika DT Sacco's strategic framework. While the consultant is at liberty to propose his/her methodology that would adequately result in the expected deliverables outlined in these terms of reference, the following four steps are suggested as a basis for the strategic plan development process.

Step One: Prepare

i. Inception workshop with the Saccos 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 with critical stakeholders (SWOT analysis);
ii. Review of relevant organizational documents (vision, mission statement, theory of change, Business Plan, etc.);
iii. Interviews with Imarika DT Sacco 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 Imarika DT Sacco want to be in 2031?
    b. What does Imarika DT Sacco want to achieve during this timeline?
    c. How would Imarika DT Sacco work to deliver its training and capacity building goals?
    d. How will Imarika DT Sacco get there?
    e. What might go wrong for Imarika DT Sacco in the dynamic business environment?
    f. And how would Imarika DT Sacco avoid this?
    g. How will Imarika DT Sacco know when we get there? (measure of success)
    h. How will Imarika DT Sacco 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. Imarika DT Sacco formally approves the final document;
iv. Dissemination and implementation of the Strategic Plan.
v. Monitoring and review 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 Imarika DT Sacco strategic direction, covering both internal and external factors relevant to the organizational operating environment.
iii. A two-day strategic planning workshop for the Imarika DT Sacco Board, Management and selected partners (if any)
iv. A new 5-year 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 and any other recommendation for future consideration by the Sacco

4.0 CONSULTANCY DURATION

The strategic planning exercise is expected to be fully completed by 11th September 2026 and the whole process will last for 6 weeks.

5.0 SUPERVISION OF THE WORK

This consultancy assignment will be supervised by Imarika DT Sacco's Chief Executive Officer (CEO), with the support of the Sacco's 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 Imarika DT Sacco Society Ltd and shall not be disclosed save for where express permission has been granted as such.