



STANDARD REQUEST FOR PROPOSALS (RFP)

**ASCCS/CEO/SP/01/2024 – REQUEST FOR PROPOSAL
FOR CONSULTANCY SERVICES TO UNDERTAKE
DEVELOPMENT OF APSTAR DT SACCO SOCIETY LTD
STRATEGIC PLAN 2024-2028.**

(SELECTION OF CONSULTANT(S)/ CONSORTIUMS)

(Due to the nature of this assignment a consortium of consultants are encouraged to bid)

**DATE OF (RFP) SUBMISSION IS ON OR BEFORE FRIDAY 3RD MAY 2024 AT
1200 NOON**

TABLE OF CONTENTS

| | Page |
|---|------|
| INTRODUCTION | 3 |
| SECTION I. Letter of Invitation | 4 |
| SECTION II. Information to consultants..... | 5-9 |
| SECTION III Evaluation criteria. | 10 |
| SECTION IV. Technical proposal format | 11 |
| SECTION V Financial proposal format | 12 |
| SECTION VI. Terms of reference | 23 |

INTRODUCTION

1. This Standard Request for Proposals (SRFP) has been prepared for use by public entities in Kenya in the procurement of consultancy services and selection of consultants.
2. The SRFP includes Standard form of Contract for Large Assignments and small assignment which are for lump sum or time based payments.
3. A separate SRFP has been provided for selection of individual professional consultants.
4. The General Conditions of Contract should not be modified and instead the Special Conditions of Contract should be used to reflect the unique circumstances of the particular assignment. Similarly, the information to consultants should only be clarified or amended through the Appendix to information to Consultants.
5. This SRFP document shall be used where a shortlist of consultancy firms already exist or has been obtained through a shortlist after an advertisement of Expression of Interest for Consultancy required.

SECTION I - LETTER OF INVITATION TO TENDER

TENDER NAME. ASCCS/CEO/SP/01/2024 – REQUEST FOR PROPOSAL FOR CONSULTANCY SERVICES TO UNDERTAKE DEVELOPMENT OF APSTAR DEPOSITE TAKING SACCO SOCIETY LTD STRATEGIC PLAN 2024-2028.

DATE. - 19TH APRIL 2024

- 1.1 APSTAR DT SACCO SOCIETY LIMITED invites proposals for the following Consultancy services. Provision of Consultancy services for the development of APSTAR DT Sacco ltd strategic plan 2024-2028.
- 1.2 Interested eligible candidates may obtain further information from and inspect the tender documents at procurement office on 4th floor during normal working hours.
- 1.3 Completed tender documents are to be enclosed in plain sealed envelopes marked with tender reference number and be deposited in the Tender Box at Ukulima Co-operative House on 2nd floor so as to be received on or before FRIDAY 3RD MAY 2024 at 1200 Noon
- 1.4 Prices quoted should be net inclusive of all taxes and delivery must be in Kenya Shillings and shall remain valid for 120 days from the closing date of the tender.
- 1.5 (RFP) Tenders will be opened immediately thereafter in the presence of the Candidates or their representatives who choose to attend at APSTAR Sacco Boardroom on 2nd Floor Ukulima Co-operative House.
- 1.6 APSTAR DT Sacco reserves the right to reject any (RFP) tender without giving reasons for the rejection and does not bind itself to accept the lowest or any tender
- 1.7 Tenders must be accompanied by a tender security of 2% of the tendered sum in form of a Guarantee from a reputable Bank or an insurance company approved by PPRA Payable to APSTAR DT Savings and Credit Society ltd
- 1.8 Tender document to be charged kshs. 1000/= payable through APSTAR DT Fosa Nairobi

Chemarum Victor

For: CHIEF EXECUTIVE OFFICER

SECTION II – INFORMATION TO CONSULTANTS (ITC)

Table of Contents

- 2.1 Introduction
- 2.2 Clarification and amendment of RFP document
- 2.3 Preparation of Technical Proposal
- 2.4 Financial proposal
- 2.5 Submission, Receipt and opening of proposals
- 2.6 Proposal evaluation general
- 2.7 Evaluation criteria
- 2.8 Mandatory requirements
- 2.9 Technical and financial proposal format
- 2.10 Terms of reference

2.1 Introduction

- 2.1.1 The Client named the Appendix to “ITC” will select a firm among those invited to submit a proposal, in accordance with the method of selection detailed in the appendix. The method of selection shall be as indicated by the procuring entity in the Appendix.
- 2.1.2 The consultants are invited to submit a Technical Proposal and a Financial Proposal, or a Technical Proposal only, as specified in the Appendix “ITC” for consulting services required for the assignment named in the said Appendix. A Technical Proposal only may be submitted in assignments where the Client intends to apply standard conditions of engagement and scales of fees for professional services which are regulated as is the case with Building and Civil Engineering Consulting services. In such a case the highest ranked firm of the technical proposal shall be invited to negotiate a contract on the basis of scale fees. The proposal will be the basis for Contract negotiations and ultimately for a signed Contract with the selected firm.
- 2.1.3 The consultants must familiarize themselves with local conditions and take them into account in preparing their proposals. To obtain first hand information on the assignment and on the local conditions, consultants are encouraged to liaise with the Client regarding any information that they may require before submitting a proposal and to attend a pre-proposal conference where applicable. Consultants should contact the officials named in the Appendix “ITC” to arrange for any visit or to obtain additional information on the pre-proposal conference. Consultants should ensure that these officials are advised of the visit in adequate time to allow them to make appropriate arrangements.
- 2.1.4 The Procuring entity will provide the inputs specified in the Appendix “ITC”, assist the firm in obtaining licenses and permits needed to carry out the services and make available relevant project data and reports.
- 2.1.5 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.
- 2.1.6 The procuring entity’s employees, committee members, board members and their relative (spouse and children) are not eligible to participate.
- 2.1.7 The price to be charged for the tender document shall be 1000/=
- 2.1.8 The procuring entity shall allow the tenderer to review the tender document free of charge before purchase.

2.2 Clarification and Amendment of RFP Documents

2.2.1 Consultants may request a clarification of any of the RFP documents only up to seven [7] days before the proposal submission date. Any request for clarification must be sent in writing by paper mail, cable, telex, facsimile or electronic mail to the Client's address indicated in the Appendix "ITC". The Client will respond by cable, telex, facsimile or electronic mail to such requests and will send written copies of the response (including an explanation of the query but without identifying the source of inquiry) to all invited consultants who intend to submit proposals.

2.2.2 At any time before the submission of proposals, the Client may for any reason, whether at his own initiative or in response to a clarification requested by an invited firm, amend the RFP. Any amendment shall be issued in writing through addenda. Addenda shall be sent by mail, cable, telex or facsimile to all invited consultants and will be binding on them. The Client may at his discretion extend the deadline for the submission of proposals.

2.3 Preparation of Technical Proposal

2.3.1 The Consultants proposal shall be written in English language

2.3.2 In preparing the Technical Proposal, consultants are expected to examine the documents constituting this RFP in detail. Material deficiencies in providing the information requested may result in rejection of a proposal.

2.3.3 While preparing the Technical Proposal, consultants must give particular attention to the following:

- (i) If a firm considers that it does not have all the expertise for the assignment, it may obtain a full range of expertise by associating with individual consultant(s) and/or other firms or entities in a joint venture or sub-consultancy as appropriate. Consultants shall not associate with the other consultants invited for this assignment. Any firms associating in contravention of this requirement shall automatically be disqualified.
- (ii) For assignments on a staff-time basis, the estimated number of professional staff-time is given in the Appendix. The proposal shall however be based on the number of professional staff-time estimated by the firm.
- (iii) It is desirable that the majority of the key professional staff proposed be permanent employees of the firm or have an extended and stable working relationship with it.

- (iv) Proposed professional staff must as a minimum, have the experience indicated in Appendix, preferably working under conditions similar to those prevailing in Kenya.
- (v) Alternative professional staff shall not be proposed and only one Curriculum Vitae (CV) may be submitted for each position.

2.3.4 The Technical Proposal shall provide the following information using the attached Standard Forms;

- (i) A brief description of the firm's organization and an outline of recent experience on assignments of a similar nature. For each assignment the outline should indicate *inter alia*, the profiles of the staff proposed, duration of the assignment, contract amount and firm's involvement.
- (ii) Any comments or suggestions on the Terms of Reference, a list of services and facilities to be provided by the Client.
- (iii) A description of the methodology and work plan for performing the assignment.
- (iv) The list of the proposed staff team by specialty, the tasks that would be assigned to each staff team member and their timing.
- (v) CVs recently signed by the proposed professional staff and the authorized representative submitting the proposal. Key information should include number of years working for the firm/entity and degree of responsibility held in various assignments during the last three (3) years.
- (vi) Estimates of the total staff input (professional and support staff staff-time) needed to carry out the assignment supported by bar chart diagrams showing the time proposed for each professional staff team member.
- (vii) A detailed description of the proposed methodology, staffing and monitoring of training, if Appendix "A" specifies training as a major component of the assignment.
- (viii) Any additional information requested in Appendix "A".

2.3.5 The Technical Proposal shall not include any financial information.

2.4 Preparation of Financial Proposal

2.4.1 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, unless Appendix "A" specifies otherwise.

2.4.2 Consultants shall express the price of their services in Kenya Shillings.

2.4.3 The Proposal must remain valid for 40 days after the submission date. During this period, the consultant is expected to keep available, at his own cost, the professional staff proposed for the assignment. If the Client wishes to extend the validity period of the proposals, the consultants shall agree to the extension.

2.5 **Submission, Receipt, and Opening of Proposals**

2.5.1 The original proposal Technical and financial shall be prepared in indelible ink. It shall contain no interlineations or overwriting, except as necessary to correct errors made by the firm itself. Any such corrections must be initialed by the persons or person authorized to sign the proposals.

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

2.5.3 After the deadline for submission of proposals, the documents shall be opened immediately by the committee.

2.6 **Proposal Evaluation General**

2.6.1 From the time the bids are opened to the time the Contract is awarded, if any consultant wishes to contact the Client on any matter related to his proposal, he should do so in writing at the address indicated in the Appendix "ITC". Any effort by the firm to influence the Client in the proposal evaluation, proposal comparison or Contract award decisions may result in the rejection of the consultant's proposal.

2.7 **SECTION III - EVALUATION CRITERIA**

EVALUATION CRITERIA

(a) Mandatory Criteria

2.8 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.
6. Business permit
7. CR12 certificate

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, Business Development, Project Management, investments or relevant field applicable the assignment
- ii. At least five years' professional experience in strategic planning, management research and policy development,
- iii. Good understanding and experience in developing strategies in highly computerized environment and with innovative and creative mind-set.
- iv. Prior working experience on decentralization issues is an added advantage
- v. Demonstrated experience in working with stakeholders in not-for-profit sector development programs especially in the area of capacity development
- vi. Highly motivated and committed to the values of transparency and integrity.
- vii. Skills in facilitation of stakeholder engagements/workshops.
- viii. Evidence of having undertaken similar assignments;

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

| | CRITERIA | Score/Point |
|---|--|--------------------|
| 1 | Relevant Experience for the Assignment (Corporate) | Marks |
| a | Number of Strategic Plans developed recently. 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 |
| | Sub Total | 25 |
| 2 | Methodology and Approach | |
| a | Understanding the TORs <ul style="list-style-type: none"> • Conformity to the TORs • Consultant's initiatives and comments on the TORs | 15 |
| b | Appropriateness of Methodology <ul style="list-style-type: none"> • 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 Master's Degree in in a relevant field in the area of planning, Public Policy and Development studies or relevant field applicable to the assignment | 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 |
| | Sub Total | 20 |
| | Total | 70 |

Tenders must score at least 60 Marks and above 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 | Marks |
| a | Financial Capability: Prove of adequate financial resources to undertake the exercises | 30 |
| | Total | 30 |

NB: ALL FINANCIALS MUST BE QUOTED IN KSHS.

ONLY AND INCLUSIVE OF ALL THE APPLICABLE

TAXES.

**TECHNICAL EVALUATION CRITERIA ACCOUNTS FOR 70 MARKS
FINANCIAL EVALUATION CRITERIA ACCOUNTS FOR 30 MARKS**

FINANCIALS (COST OF WORK) ACCOUNTS FOR 30 MARKS

| | | |
|------------------------------|---|-------------------|
| Lowest priced quote | - | 30 Marks |
| 2nd Lowest | - | 22.5 Marks |
| 3rd Lowest | - | 15 Marks |
| Others | - | 7.5 Marks |

SECTION IV - TECHNICAL PROPOSAL FOMART

Table of Contents

1. Technical proposal submission form
2. Firms references
3. Comments and suggestions of consultants on the Terms of reference and on data, services and Facilities to be provided by the procuring entity
4. Description of the methodology and work plan for performing the assignment
5. Team composition and Task assignments
6. Format of curriculum vitae (CV) for proposed Professional staff
7. Time schedule for professional personnel
8. Activity (work schedule)

1. TECHNICAL PROPOSAL SUBMISSION FORM

Date

To: _____ [*Name and address of Client*]

Ladies/Gentlemen:

We, the undersigned, offer to provide the consulting services for

_____ [*Title of consulting services*] in accordance with your Request for Proposal dated _____ [*Date*] and our Proposal. We are hereby submitting our Proposal, which includes Technical Proposal and a Financial Proposal sealed under one envelope-*where applicable*].

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

We remain,

Yours sincerely,

_____ [*Authorized Signature*]:

_____ [*Name and Title of Signatory*]

:

_____ [*Name of Firm*]

:

_____ [*Address:*]

2. 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: | | Clients contact person for the assignment. |
| Address: | | No of Staff-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 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; _____

3. 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.

4. DESCRIPTION OF THE METHODOLOGY AND WORK PLAN FOR PERFORMING THE ASSIGNMENT

5. TEAM COMPOSITION AND TASK ASSIGNMENTS

1. Technical/Managerial Staff

| Name | Position | Task |
|------|----------|------|
| | | |
| | | |
| | | |
| | | |
| | | |

2. Support Staff

| Name | Position | Task |
|------|----------|------|
| | | |
| | | |
| | | |
| | | |

6. 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: _____

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 authorised representative of the firm]

Full name of staff member:

Full name of authorized representative:

7. TIME SCHEDULE FOR PROFESSIONAL PERSONNEL

Weeks(in the Form of a Bar Chart)

| Name | Position | Reports Due/ Activities | Weeks | | | | | | | | | Number of Weeks | |
|------|----------|----------------------------|-------|---|---|---|---|---|---|---|---|--------------------|--|
| | | | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | | |
| | | | | | | | | | | | | | |

Reports Due: _____

Activities Duration: _____

Signature: _____
 (Authorized representative)

Full Name: _____

Title: _____

Address: _____

8. ACTIVITY (WORK) SCHEDULE

(a). Field Investigation and Study Items

| | 1 st | 2 nd | 3 rd | 4 th | 5 th | 6 th | 7 th | 8 th | 9 th | 10 th |
|-----------------|-----------------|-----------------|-----------------|-----------------|-----------------|-----------------|-----------------|-----------------|-----------------|------------------|
| Activity (Work) | | | | | | | | | | |
| _____ | | | | | | | | | | |
| _____ | | | | | | | | | | |
| _____ | | | | | | | | | | |
| _____ | | | | | | | | | | |

[1st, 2nd, etc, are weeks from the start of assignment)

(b). Completion and Submission of Reports

| Reports | Date |
|---|------|
| 1. Inception Report | |
| 4. Interim Progress Report (a) First Status Report (b) Second Status Report | |
| 3. Draft Report | |
| 4. Final Report | |

SECTION V - FINANCIAL PROPOSAL STANDARD FORMS

Table of Contents

1. Financial proposal submission Form
2. Summary of costs

1. FINANCIAL PROPOSAL SUBMISSION FORM

_____ [Date]

To: _____

[Name and address of Client]

Ladies/Gentlemen:

We, the undersigned, offer to provide the consulting services for (_____) *[Title of consulting services]* 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 remain,

Yours sincerely,

_____ *[Authorized Signature]*
:
_____ *[Name and Title of Signatory]:*
_____ *[Name of Firm]*
_____ *[Address]*

2. SUMMARY OF COSTS

| Costs | Currency(ies) | Amount(s) |
|------------------------------------|---------------|-----------|
| Subtotal | | |
| Taxes | | |
| Total Amount of Financial Proposal | | <hr/> |

2.10 TERMS OF REFERENCE FOR DEVELOPING THE APSTAR SACCO STRATEGIC PLAN FOR 2024-2028

1.0 OVERVIEW

Apstar DT Sacco Society Ltd formerly Ukulima Sacco is one of the leading tier 1 Sacco in the country registered under the Co-operative Societies Act no. 12 of 1997 CAP 490 on 2nd February 1972 with the mission of enhancing members' empowerment through provision of quality financial services. From a humble beginning, we now have our headquarters in Nairobi and branches in Kisumu, Mombasa, Eldoret, Embu, Nakuru, Kisii., Kakamega and Meru

The society has an existing Strategic plan **2022-2026** which has been instrumental in guiding its activities since 2022. However, there has been significant changes in the operating environment which include technological and financial, which have necessitated the society to redefine its core values that are aligned towards growing this new brand through a newly adopted business model. Arising from the above, the Society seek to engage the services of business strategists/consultant(s) who shall guide through the process of molding Apstar Sacco business model, which incorporates fundamental principles of the Blue Ocean strategy into a well-crafted and implementable strategic framework. This strategic framework shall contain practical specific, measurable, realistic and time bound strategies that will guide our business within a defined time frame. The consultant is expected to adopt an approach that shall cover the existing operating environment, close engagement with internal strategic Planning Team (comprising of the Board of directors, CEO, the General managers, and head of departments) and entail a participatory process, including, but not limited to

- i. Consultations with Apstar DT Sacco senior management and staff to enable the consultant to understand Apstar Sacco business model.
- ii. Facilitation of a strategic planning workshop for board of directors and management to further build on the Strategic plan to further molding Apstar Sacco business model to an implementable strategic plan
- iii. Developing a comprehensive Strategic Plan to guide the growth of Apstar Sacco brand within a desired time frame incorporating input from Apstar 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 practical data driven strategic framework for Apstar DT Sacco that considers 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 globally.

1.2 Specific Objectives of the consultancy

To build on the achievements brought forward which includes the path of a new brand identity as part of the implementation of the Sacco's **2022-2026** Strategic Plan taking cognizant of the ever-changing operating business environment i.e. Legal, Technological, Economic and Social factors among others. The consultant therefore is expected to review and guide Apstar DT Sacco Team to: -

- i. Review and evaluate the current strategic plan 2022-2026 with a view of establishing the extent of its implementation;
- ii. Interpret the Apstar DT Sacco Vision, Mission, and Core values in order to align them towards realizing the Sacco's aspirations and promise of giving hope to new beginnings and assist members achieve their dreams and aspirations;
- iii. Undertake a comprehensive SWOT analysis Identify strategic areas of focus, with clear cut SMART objectives that shall guide the Sacco's path to realize the aspirations as mentioned in (ii) above;
- iv. Conceptualize and demystify Apstar DT Sacco Business Model into a structured and contextualized framework that shall not only result to attraction of new members but also enhance retention rate of existing members.
- v. Develop Apstar Sacco Sustainability plan, that shall address the Society's Social and environmental concerns that have a long-term co-relation with the Sacco's Sustainability quest to attract funding;
- vi. Re-align the Human Resource and skills set to the desired organizational structure that shall help realize objectives of this new strategic framework that forms the anchor towards the growth of Apstar DT Sacco;
- vii. Develop a comprehensive Measurement, Evaluation and Reporting framework that encompasses the Society's Performance Management System (**PMS**) that has well elaborated and defined evaluation metrics alongside each Key Performance Indicator (**KPI**) to enable effective tracking of the strategic plan;
- viii. Further assist the Apstar Sacco team embed this reporting framework in (vii) above into the Society's Business Intelligence (**BI**) Software to guide in decision making through Realtime

- analysis of the Sacco's performance and data mining via visual dashboards;
- ix. Develop a robust, efficient and comprehensive Budget and resource allocation framework for each strategic activity with a well defined and measurable Return on Investment (ROI) that shall help the Society enhance prudent financial management practices towards realization of the Strategic Plan targets.
 - x. Undertake a comprehensive stakeholder mapping to identify strategic partners and collaborators alongside relevant strategies to engage them with an aim of advancing our stated objectives in a bid to sustain a mutual beneficial relationship;

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 Apstar 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 this 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 Sacco's 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 Analyze

- 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 Apstar DT Sacco secretariat; - assessment report outlining critical issues, contextual analysis, gaps to be addressed and opportunities to grab.

Step Three: Define-Strategic Plan

- i. Analyze feedback from the different sources (as outlined in step 2);
- ii. Formulate strategic framework - guided by the following questions:
 - a. Where does Apstar DT Sacco want to be in 2028?

- b. What does Apstar DT Sacco want to achieve during this timeline?
- c. How would Apstar DT Sacco work to deliver its training and capacity building goals?
- d. How will Apstar DT Sacco get there?
- e. What might go wrong for Apstar DT Sacco in the dynamic business environment?
- f. And how would Apstar DT Sacco avoid this?
- g. How will Apstar DT Sacco know when we get there? (measure of success)
- h. How will Apstar 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. Apstar 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 with clear understanding on the blue ocean strategy alongside incorporation of Technological factors such as business intelligence in measurement and evaluation of the strategy.
- ii. An assessment report demonstrating understanding of the proposed Apstar Sacco Business Model, addressing both internal and external factors relevant to the organizational operating environment.
- iii. A Gantt chart highlighting critical steps towards the delivery of a strategic plan document with clear timeline.
- iv. Facilitate during the strategic planning workshop for the Apstar DT Sacco Board, Management and selected partners (if any)
- v. A proposed organization structure aligned to the new Apstar Sacco Business model that is meant to propel the strategic plan to meet its objectives.
- vi. A robust Performance Management System (PMS) framework that encapsulate the Key Performance Indicators (KPI) alongside measurement and evaluation metrics to evaluate

performance of the strategic plan targets.

- vii. A reporting and analysis framework embedded within the society's Business intelligence software to analyze all society operations indicating the health status of the business in Realtime via visual dashboards.
- viii. Segmented Business analysis operations dashboards from the lowest level of operations to the executive level each indicating the status of the business in Realtime.
- ix. A comprehensive Budget framework that aligns Key Performance Indicators (KPI) vis a vis a commensurate Return on Investment (ROI)

4.0 CONSULTANCY DURATION

The strategic planning exercise is expected to be completed within one month.

5.0 SUPERVISION OF THE WORK

This consultancy assignment will be supervised by Apstar DT Sacco's Chief Executive Officer (CEO), with the support of the Sacco's Strategic Planning team.

6.1 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 Apstar DT Sacco Society Ltd and shall not be disclosed save for where express permission has been granted as such.