APSTAR SACCO SOCIETY LIMITED

REQUEST FOR PROPOSAL (RE-ADVERTISEMENT)

RFP REFERENCE NO: APSTAR/RFP/HR/2026-02

RFP NAME: PROVISION OF CONSULTANCY SERVICES FOR JOB EVALUATION

JUNE 2026

FP Reference No	APSTAR/RFP/HR/2026-02
RFP issue date	1st July 2026
RFP Clarifications deadline	8th July 2026 5PM EAT
Proposal Submission deadline	15th July 2026 12 NOON EAT
Submission Method	Tenderers shall submit physical copies of the tender documents, with the Original Tender and Copy of Tender sealed in separate envelopes and clearly marked accordingly. The Financial Proposal shall be enclosed in a separate sealed envelope clearly marked “FINANCIAL PROPOSAL.” All sealed envelopes shall then be placed in one outer envelope and deposited in the Tender Box located on the 2nd Floor at Ukulima Cooperative House.
Tender Documents	Tender documents are available from the society’s Procurement offices located at 4th floor of Apstar Co-operative House located on Uhuru Highway/Haileselasie junction. Interested Tenderers shall be required to pay a **non-refundable** fee of **Kshs 1,000.00** payable at FOSA branch Nairobi for each set of documents before they are issued with the hard copy of the tender document. Interested bidders may also obtain full copy of the Tender Docun from our website: www.apstarsacco.coop
Physical Address	Ukulima Co-operative House, Haile Selassie Avenue, P.O. 44071-00100, Nairobi, Kenya

1.0 Invitation to Tender

Apstar DT Sacco invites eligible and qualified consultancy firms or individual consultants to submit proposals for the provision of **Consultancy Services – Staff Job Evaluation**.

The assignment seeks to establish a structured, equitable, and transparent job evaluation and grading system that will support fair compensation, internal equity, and alignment of roles to the Sacco's strategic objectives.

Interested bidders are hereby invited to submit both **technical and financial proposals** separately in accordance with the requirements outlined in this Request for Proposals (RFP) and the attached Terms of Reference (ToR)

2.0 Instruction to Bidders

2.1General Information

Bidders are advised to carefully read and understand all sections of this Request for Proposals (RFP), including the Terms of Reference (ToR), before preparing their submissions. Submission of a proposal shall be deemed to constitute full acceptance of the conditions set out in this document

2.2 Cost of Preparing the Proposal

All costs incurred in the preparation and submission of proposals shall be borne entirely by the bidder. Apstar DT Sacco shall not be liable for any costs regardless of the outcome of the tendering process.

2.3 Language of Proposals

All proposals, correspondence, and supporting documents shall be prepared in **English Language**.

2.4 Validity of Proposals

Proposals shall remain valid for a period of **ninety (90) days** from the date of submission. Any proposal with a shorter validity period may be considered non-responsive.

2.5 Clarifications and Amendments

Bidders may request clarification in writing regarding this RFP. Any clarification requests must be submitted within the period specified in the tender notice.

Apstar DT Sacco may, at its discretion, issue addenda to clarify or amend the RFP. Any such addenda will form part of the RFP and will be communicated to all bidders

2.6 Submission of Proposals

Proposals must be submitted as follows:

Clearly marked: **“REQUEST FOR PROPOSAL FOR PROVSION CONSULTANCY SERVICES – JOB EVALUATION”** Submitted to the Tender Box at Ukulima Cooperative Hse 2nd Flr

Bidders are required to submit the Technical Proposal and Financial Proposal as separate documents.

The Financial Proposal must be password protected. The password should not be shared at the time of submission.

Only bidders who successfully meet the minimum technical evaluation score shall be notified and requested to submit the password for opening and evaluation of their Financial Proposal

Late submissions will not be accepted under any circumstances

2.7 Modification or Withdrawal of Proposals

A bidder may modify or withdraw their proposal prior to the submission deadline by providing a written notice. No modifications or withdrawals shall be accepted after the deadline.

2.8 Evaluation of Proposals

Evaluation will be conducted in accordance with the criteria outlined in this RFP and terms of reference

2.9 Award of Contract

The contract will be awarded to the bidder who achieves the highest combined technical and financial score, subject to due diligence and satisfactory negotiations.

2.10 Confidentiality and Corrupt Practices

Information relating to evaluation of proposals shall not be disclosed until the winning firm has been notified of the award.

The Sacco requires all Bidders to observe the highest standards of ethics during selection and contract execution.

Any proposal found to involve corrupt, fraudulent, or collusive practices shall be rejected immediately. A Bidder found to have engaged in corrupt or fraudulent practices risks debarment from public procurement in Kenya.

TERMS OF REFERENCE FOR THE JOB EVALUATION FOR APSTAR SACCO SOCIETY'S STAFF

Background

Apstar Sacco Society Ltd is re-advertising for a qualified consultancy firm to undertake a comprehensive Job Evaluation exercise. This is a key deliverable under the Strategic Plan 2025–2029 (Institutional Capacity Building – KRA 4) to support staff establishment review, equitable remuneration structures, job grading, career progression, and enhanced HR management.

The Sacco has been going through a transformation process to enhance its efficiency and customer experience. The rapid adoption of technologies such as Member Portals, WhatsApp Chatbots, EDMS (Electronic Document Management Systems), AI-powered credit scoring, automated loan processing, mobile banking, data analytics dashboards, and other digital tools is fundamentally transforming how SACCOs operate. What used to be manual, paper-based, repetitive work is now automated or semi-automated. This shift makes a comprehensive job evaluation not just useful but strategically essential.

Some Roles and Responsibilities may have significantly changed as many traditional jobs (e.g., tellers, loan officers, records clerks, back-office administrators now involve less manual processing and more oversight, exception handling, data interpretation, and customer engagement through digital channels. In addition, new competencies may be required, such as digital literacy, data analytics, AI tool management, chatbot supervision, cybersecurity awareness, and customer experience in digital platforms. Digitization may also create entirely new positions or significantly upgraded ones, such as Digital Transformation / Innovation Manager, Data Analyst / Business Intelligence Officer, ICT Systems Administrator (with focus on Member Portal & EDMS), AI & Automation Specialist, Cybersecurity & Compliance Officer, and Customer Experience (CX) Digital Officer (managing WhatsApp Chatbot & portal), among others.

There is also a need to align roles and responsibilities with Strategic Goals and Future-Proofing. The Society 2025–2029 Strategic Plan emphasizes Operational Efficiency, Digitization, and Institutional Capacity. Job evaluation is expected to align individual roles directly to the KRAs, supporting succession planning and career progression in a digital environment. Provides a foundation for performance management systems that reward digital innovation and results

The Society therefore wishes to recruit a consultant to undertake an objective Job Evaluation and Skills audit exercise in order to reorganize and harmonize its functions in line with its strategic intent. The consultant is expected to gather information on all internal jobs, conduct situational analysis through study of the current organizational structure, job families and groupings, grading structures and the current remuneration strategy for both Management and lower cadre to ensure alignment of the structures, functions, grading and salary structures, taking into account the basic concept of equal pay for equal value of work as well as address any inequities and disparities in similar job functions.

A. Project Description

Job evaluation is the process of determining the value of an individual job in relation to other jobs in an organization. It is thus defined as "a systematic process for determining the relative value of a series of jobs within an organization."

It begins with job analysis to obtain job descriptions and job specifications, and includes the process of relating the description to a system predesigned to determine the value of jobs.

Job evaluation provides a consistent procedure that sets up and maintains a hierarchy of jobs attaching to each job a pay rate commensurate with its status in the hierarchy. It is a decision-making process used to determine job worth.

B. Project Objective

The purpose of the assignment is to evaluate Society's work structures, determine the relative level, importance, complexity, and value of each job in the organization, develop suitable grading and remuneration structures, determine optimal staffing levels, and develop comprehensive job descriptions and specifications.

C. Scope of Work

This assignment applies to all substantive jobs within the Society. The consultant shall review and select an appropriate job evaluation method and process. An inception report detailing situational analysis and recommending the most appropriate Job Evaluation methodology, tool, guidelines and program is expected. Further, the selected consultants will provide a final report on the entire assignment to the Chief Executive Officer (CEO).

D. Project Activities

The Consultant will undertake the following tasks;

1) Review existing organizational structure and all current job descriptions, benchmark with Peers DT Sacco, and recommend a new structure
2) Review **the current work structures** and determine their adequacy for operations
3) Review and **design result-oriented functional structures** that will facilitate efficient decision-making, ensure operational efficiency, and deliver the mandate of the Sacco in line with its strategic goals and mandate. Further **benchmark with Peers DT Sacco** on functional structure and organogram
4) Carry out **job analysis and job evaluation** to determine the relative worth of each job and design a suitable grading structure
5) **Undertake a salary survey and design a suitable remuneration structure.**
6) Develop **a new job grading structure** with clear bands and salary ranges benchmarked to the SACCO and financial sector

7) Prepare and present a **detailed job evaluation** report detailing the process undertaken, findings, and recommendations.
8) Facilitate a validation workshop with Management and present final recommendations to the Board of Directors
9) Provide Implementation guidelines and a change management plan.
10) Training session for HR and Management on the new structure.

E. Key Deliverables

1. Inception Phase

(a) Inception Report (within 7 days of contract signing) – including detailed work plan, methodology, data collection tools, and stakeholder engagement strategy.
(b) Approved Job Analysis Instruments (questionnaires, interview guides, focus group discussion guides).
(c) Approved Job Evaluation Framework and Methodology equivalent.

2. Organizational Structure Review & Diagnostic

(a) **Current Organizational Structure Audit Report** – detailed assessment of functional alignment with the 2025–2029 Strategic Plan, span of control, redundancies, and efficiency gaps.
(b) **Revised Master Organogram** – approved future-state organizational structure showing clear reporting lines from Delegates and the Board to staff, with clear separation of core business and support functions.
(c) Scalability recommendations aligned to projected growth over the next 5 years.

3. Job Analysis & Documentation

(a) **Updated Job Descriptions (JDs)** for **all positions** – reflecting current realities, digital competencies (Member Portal, WhatsApp Chatbot, EDMS, AI tools, etc.), and regulatory requirements.
(b) **Job Analysis Report** – summary of findings from questionnaires, interviews, focus group discussions, and job observations.

4. Job Evaluation & Grading

(a) **Job Ranking and Grading Report** – objective evaluation of all jobs using a recognized methodology.
(b) **New Job Grading Structure** – clearly defined job grades/bands with point scores and hierarchy.
(c) Role valuation matrix showing relative worth of all positions.

5. Compensation & Market Benchmarking

(a) **Market Salary Survey Report** – benchmarking of current and proposed salaries against peer SACCOs and financial institutions in Kenya.
(b) **Proposed Pay Structure** – competitive salary scales, benefits, and allowances for all grades.
(c) **Pay Gap Analysis Report** – comparison between current salaries and proposed new scales (with financial implications).

6. Implementation & Change Management

(a) **Implementation Roadmap & Strategy** – phased transition plan with timelines, responsibilities, and cost implications.
(b) **Change Management and Communication Plan** – staff engagement strategy to ensure smooth adoption.
(c) **Training Session** – capacity building for HR team and Management on the new grading structure, job evaluation process, and maintenance.

7. Final Reporting & Approval

(a) **Draft Job Evaluation Report** for review and feedback.
(b) **Final Comprehensive Job Evaluation Report** – including executive summary, methodology, findings, recommendations, organogram, grading structure, and pay scales.
(c) **Board Presentation** – professional presentation and facilitation of validation workshop with Board of Directors and Senior Management.
(d) **Final Approved Deliverables Package** (all documents in editable and PDF formats).

F. Duration of the Assignment

The exercise is expected to be completed within a period of approximately 3 months.

G. Consultant Responsibilities

The consultants shall be expected to:

a. Provide transport, accommodation and related allowances to their staff and ensure that they are on-site at all times.
b. Provide the computers and related equipment to their staff
c. Provide stationery and other related materials for producing reports for the assignment.
d. Avail a lead consultant on-site as required for the duration of the assignment.

H. Client's Responsibilities

The client shall:

a) Provide all available information and relevant documentation to consultant as and when required.

b) Support and co-ordinate appointment of Job Evaluation Committee and ensure that members are available for meetings and training when needed.

c) Make all the necessary logistical arrangements for trainings and meetings.

SECTION VI - EVALUATION CRITERIA

General Provision

This section contains the criteria that Apstar Sacco shall use to evaluate tender and qualify tenderers. No other factors, methods or criteria shall be used other than specified in this tender document.

MANDATORY REQUIREMENTS

The Procuring Entity will start by examining all tenders to ensure they meet in all respects the eligibility criteria, and that the tender is complete in all aspects in meeting the requirements. The Standard Tender Evaluation Report for evaluating Tenders provides clear guidelines on how to deal with the review of these requirements. Tenders that do not pass the Mandatory requirements examination will be considered non-responsive and will not be considered further.

TECHNICAL EVALUATION

The technical proposal will carry a weight of 80% while the financial proposal will carry a weight 20%. Only those who meet the Mandatory requirements and 70 marks in the technical requirements will be evaluated further. The bids will be evaluated using the criteria set as below.

Evaluation Criteria

Mandatory Requirements

NO	REQUIREMENT	RESPONSIVENESS (YES/NO)
1.	Proof of registration and incorporation to be supported by attaching a valid certificate from the Registrar of Companies	
2.	Must submit a current and valid copy of a tax compliance certificate from the Kenya Revenue Authority. Valid Tax Compliance Certificate	
3.	Valid Business Permit	
4.	Duly filled Business Questionnaire	
5.	Dully filled Certificate of Independent Proposal Determination	
6.	Sequentially Serialized and paginated Document	
7.	Audited Financial Statements for 2024 and 2025, Certified Audited accounts	
8.	Certified Copy of CR12 for Limited Companies not more than one year old from the Date of submission	
9.	Bidders must propose the Point Factor / Point Scale Method (multi-factor quantitative approach covering skills/knowledge, responsibility, effort, working conditions, decision-making, etc.). Proposals using other methodologies will be considered non-responsive.	

No.	Requirement	Score (%)
1	**Technical Evaluation**	
1)	**Adequacy of the Proposal**	40 Marks
a)	**1Technical Understanding of the Assignment, Requirements, Methodology, and Expected Outcomes (Maximum: 40 Marks)** Bidders must provide a detailed technical proposal demonstrating a deep understanding of Apstar Sacco's Job Evaluation needs and **must explicitly propose the Point Factor / Point Scale Method**. Any proposal that fails to clearly commit to and detail the Point Factor Method shall score **0 marks** in this section. The response will be evaluated based on the following **specific components**	

Sub-Criterion	Description (What Bidders Must Demonstrate)	Maximum Marks
i. Understanding of the Assignment & SACCO Context	Clear demonstration of understanding Apstar Sacco's objectives (Strategic Plan 2025–2029), challenges (e.g., staff establishment review, fair remuneration, role clarity in financial/cooperative operations), and how job evaluation will support institutional capacity building.	**4**
ii. Detailed Point Factor / Point Scale Methodology	Comprehensive explanation of the Point Factor Method, including its advantages over other methods (e.g., Paterson) for objectivity and defensibility in a SACCO setting.	**4**
iii. Proposed	Identification of at least 5 relevant compensable factors (e.g.,	**10**

	Compensable Factors & Sub-Factors	Knowledge & Skills, Responsibility & Accountability, Problem-Solving, Effort/Physical & Mental Demands, Working Conditions, Decision-Making Authority, Impact on Organization/Members) with well-defined sub-factors and degree levels tailored to SACCO roles (finance, member services, ICT, compliance, administration, etc.). Each explained factor scores 2 Marks	
	iv. Weighting, Point Allocation & Point Manual Development	Clear proposed weighting of factors, point allocation system, and a credible approach to developing a customized Point Manual for Apstar Sacco. Describe the **degree levels** for each of the 5 factors (1 Mark each Show how points will be awarded across each of the 5 factors. 1 Mark each 10	
	vi. Expected Outcomes & Deliverables	Realistic, measurable expected outcomes (e.g., equitable grading structure, salary bands, implementation roadmap, change management recommendations) with clear linkage to remuneration proposals and HR policies. **2**	
	Total: 30 Marks		
b)	Proposed Implementation work plan with clear activity timelines. Each step in the workflow (with a clear timeline) attracts 1 mark, for a maximum of **5 marks.**		5
c)	**Deliverables:** Each deliverable should be indicated with the delivery period. Each explained deliverable attracts 1 mark, a maximum of 5 **marks**		5
2	**Vendor Experience and References**		25
a)	Detailed information for at least five (5) previous Job Evaluation engagements undertaken within the last FIVE (5) years that are similar to this assignment. (Attach proof. Each experience outlined attracts 3 marks, for a maximum of **15 marks.**		15
b)	Provide at least three (5) verifiable references from similar assignments completed in the last five years, two (2) of which must be in Sacco's or from other financial institutions. Maximum 10 Marks. Each relevance outlined attracts 2 marks, for a maximum of 10 marks.		10
3	**Key professional staff qualifications and competence for the assignment.**		**15**
a)	Academic qualifications (post-graduate) and membership in relevant professional bodies (e.g., IHRM, ICPAK) – 3 marks.		**3**
b)	At least five (5) years post-qualifying experience of the lead consultant – 3 marks.		**3**
c)	Experience on similar assignments in the last five (5) years (evidence required). Each strong evidence attracts up to 3 marks (max 9 marks).		**9**
	Total Marks		**80**

FINANCIAL PROPOSAL (FP)

Financial Evaluation

The Financial evaluation shall comprise 20% of the total marks

The formulae for determining the Financial Score (sf) shall be as follows: **-**

Sf = 100 X ^{pm}**/F** where Sf is the financial score; Fm is the lowest priced financial proposal and F is the price of the proposal under consideration. Proposals will be ranked according to their combined technical *(St)* and financial *(Sf)* scores using the weights f7'=the weight given to the Technical Proposal: *P* = the weight given to the Financial Proposal; *T* + *p* =

I) indicated in the Appendix. The combined technical and financial score, S, is calculated as follows: - £ = $tx *T %* + *Sfx* P%. The vendor achieving the highest combined technical and financial score will be invited for negotiations.

N.B. The quotation should in-corporate all other costs, charges, government levies including VAT and must be in KENYA SHILLINGS .Quotations in foreign currency will be deemed non responsive and will be ultimately disqualified.

9. Additional Information

- The successful consultant will be required to sign a Non-Disclosure Agreement (NDA) and work closely with the internal Job Evaluation Committee.
- Apstar Sacco reserves the right to accept or reject any proposal without obligation.
- This re-advertisement is open to all eligible firms meeting the criteria

APPENDICES

1. **CERTIFICATE OF INDEPENDENT PROPOSAL DETERMINATION**

I, the undersigned, in submitting the accompanying TECHNICAL PROPOSAL SUBMISSION FORM to the *APSTAR SACCO SOCIETY LIMITED* ______________________________ *[Name of Procuring Entity]*

for:

Name of Assignment: **PROVISION OF CONSULTANCY SERVICES - JOB EVALUATION FOR APSTAR SACCO SOCIETY LTD RFP NO: APSTAR/RFP/HR/2026**

] in response to the request for tenders made by: ______________________________

hereby make the following statements that certify to be true and complete in every respect:

I certify, on behalf of ______________________________ *[Name of Tenderer] that*:

1. I have read and I understand the contents of this Certificate;
2. I understand that the Tender will be disqualified if this Certificate is found not to be true and complete in every respect;
3. I am the authorized representative of the Tenderer with authority to sign this Certificate, and to submit the Tender on behalf of the Tenderer;
4. For the purposes of this Certificate and the Tender, I understand that the word "competitor" shall include any individual or organization, other than the Tenderer, whether or not affiliated with the Tenderer, who:
    - Has been requested to submit a Tender in response to this request for tenders;
    - could potentially submit a tender in response to this request for tenders, based on their qualifications, abilities or experience;
5. The Tenderer discloses that [check one of the following, as applicable]:
    - The Tenderer has arrived at the Tender independently from, and without consultation, communication, agreement or arrangement with, any competitor;
    - The Tenderer has entered into consultations, communications, agreements or arrangements with one or more competitors regarding this request for tenders, and the Tenderer discloses, in the attached document(s), complete details thereof, including the names of the competitors and the nature of, and reasons for, such consultations, communications, agreements or arrangements;
6. In particular, without limiting the generality of paragraphs(5)(a) or (5) (b)above, there has been no consultation, communication, agreement or arrangement with any competitor regarding:
    - prices;
    - methods, factors or formulas used to calculate prices;
    - the intention or decision to submit, or not to submit, a proposal; or
    - the submission of a proposal which does not meet the specifications of the request for proposals; except as specifically disclosed pursuant to paragraph(5)(b) above;
7. In addition, there has been no consultation, communication, agreement or arrangement with any competitor regarding the quality, quantity, specifications or delivery particulars of the works or services to which this RFP relates, except as specifically authorized by the procuring authority or as specifically disclosed pursuant to paragraph(5)(b) above;
8. The terms of the RFP have not been, and will not be, knowingly disclosed by the Consultant, directly or indirectly, to any competitor, prior to the date and time of the official proposed opening, or of the awarding of the Contract, whichever comes first, unless otherwise required by law or as specifically disclosed pursuant to paragraph(5)(b) above.

Name ______________________________

Title ______________________________

Date ______________________________

[Name, title and signature of authorized agent of Consultant and Date]

2 CONFIDENTIAL BUSINESS QUESTIONNAIRE

Instruction to Tenderer

Tender is instructed to complete the particulars required in this Form, *one form for each entity if Tender is a JV.*
Tenderer is further reminded that it is an offence to give false information on this Form.

a) ***Tenderer's details***

1	**ITEM**	**DESCRIPTION**
2	Name of the Procuring Entity	
3	Reference Number of the Tender	
4	Date and Time of Tender Opening	
5	Name of the Tenderer Full Address and Contact Details of the Tenderer.	1.Country 2. City 3.Location 4. Building 5.Floor
6		6. Postal Address
7		7. Name and email of contact person.
8	Current Trade License Registration Number and Expiring date	
9	Name, country and full address (*postal and physical addresses, email, and telephone number*) of Registering Body/Agency	
10	Description of Nature of Business	

Maximum value of business which the Tenderer handles.

State if Tenders Company is listed in stock exchange, give name and full address (*postal and physical addresses, email, and telephone number*) of state which stock exchange

General and Specific Details

b) **Sole Proprietor,** provide the following details.

Name in full____Age
____Nationality
____Country of Origin
____Citizenship
____

c) **Partnership,** provide the following details

	NamesofPartners	Nationality	Citizenship	%Sharesowned
1				
2				
3				

Names of Person	Designation in the Procuring Entity

Registered Company, provide the following details.

i) Private or public Company

____

ii) State the nominal and issued capital of the Company:- Nominal
Kenya Shillings (Equivalent)

____

Issued Kenya Shillings (Equivalent)

____

iii) Give details of Directors as follows.

	NamesofDirector	Nationality	Citizenship	%Sharesowned
1				
2				
3				

(e) ***DISCLOSURE OF INTEREST-Interest of the Firm in the Procuring Entity.***

i) Are there any person/persons in…………………………………………(*Name of Procuring Entity*) who has/have an interest or relationship in this firm? Yes/No……………………………………… If yes, provide details as follows.

			Interest or Relationship with Tenderer
1			
2			
3			

ii) Conflict of interest disclosure

	Type of Conflict	Disclosure YES OR NO	If YES provide details of the relationship with Tenderer
1	Tenderer is directly or indirectly controlled by or is under common control with another tenderer.		
2	Tenderer receives or has received any direct or indirect subsidy from another tenderer.		
3	Tenderer has the same legal representative as another tenderer		
4	Tender has a relationship with another tenderer, directly or through common third parties, that puts it in a position to influence the tender of another tenderer, or influence the decisions of the Procuring Entity regarding this tendering process.		
5	Any of the Tenderer's affiliates participated as a consultant in the preparation of the design or technical specifications of the works that are the subject of the tender.		
6	Tenderer would be providing goods, works, non-consulting services or consulting services during implementation of the contract specifiedin this Tender Document.		

	Type of Conflict	Disclosure YES OR NO	If YES provide details of the relationship with Tenderer

7	Tenderer has a close business or family relationship with a professional staff of the Procuring Entity who are directly or indirectly involved in the preparation of the Tender document or specifications of the Contract, and/or the Tender evaluation process of such contract.		
8	Tenderer has a close business or family relationship with a professional staff of the Procuring Entity who would be involved in the implementation or supervision of the such Contract.		
9	Has the conflict stemming from such relationship stated in item 7 and 8 above been resolved in a manner acceptable to the Procuring Entity throughout the tendering process and execution of the Contract.		

Certification

On behalf of the Tenderer, I certify that the information given above is complete, current and accurate as at the date of submission.

Full Name

Title or Designation

(Signature)