

URAIA TRUST

EXPRESSION OF INTEREST

MID TERM REVIEW OF URAIA TRUST STRATEGIC PLAN 2016-2020

**CLOSING DATE AND TIME
24TH OF MAY 2017 BY 2 PM**

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**EXPRESSION OF INTEREST FOR MID TERM REVIEW OF URAIA TRUST
STRATEGIC PLAN**

Uraia Trust invites Expressions of Interest (EOI) from interested and eligible firms/individuals for **Mid-term Review of Uraia Trust’s Strategic Plan 2016-2020**. The details of the proposed assignment, objectives and the scope of work are provided in the Terms of Reference.

Interested eligible candidates to obtain comprehensive Terms of Reference at the Uraia Trust website www.uraia.or.ke/tender/

Expression of Interest documents to be sent in a plain sealed envelope clearly marked “**Expression of Interest for Mid-term Review of Strategic Plan**” addressed to

**Executive Director
Uraia Trust
Uraia House, Jacaranda Avenue, off Gitanga Road
P.O. Box 28151 - 00100
NAIROBI**

Or hand-delivered to Uraia Trust Offices located along Jacaranda Avenue off Gitanga road. The deadline for submission is **24th May 2018 at 2 p.m.**

The Expressions of Interest documents will be opened immediately thereafter, in the presence of tenderers or their representatives who choose to attend at *the Uraia offices on 24th May, 2018, 2.00 p.m.*

**EXECUTIVE DIRECTOR
URAIA TRUST**

TERMS OF REFERENCE

1.0 INTRODUCTION

Uraia Trust is a national organisation that focuses on creating an informed, empowered and democratic nation through the provision of quality civic education and empower Kenyans to exercise their civic duty in order to realize their constitutional aspirations.

Uraia's core business is to:

- Initiate, develop, manage and monitor civic education and engagement in Kenya;
- Initiate, nurture, supervise and coordinate groups that have been or will be formed for the purpose of promoting and developing the civic education programme;
- Mobilise resources and develop partnerships to support gender responsive civic education and engagement;
- Support the development objectives and or support development of the organisational capacity of partners and or participating organisations supported by the Trust;
- Support public participation and engagement by Kenyan men and women in the programme of civic education either as initiators, trainers and or trainees of gender responsive civic education on all existing and emerging issues regarding but not limited to the Kenyan Constitution;
- Facilitate gender responsive civic education and engagement through affirmative action of the youth, minorities, marginalized groups and persons with disabilities;
- Foster free and fair elections, and participation of men and women in the electoral processes by way of voter education, monitoring all electoral processes and advocating for the democratic values of fairness, independence, integrity, credibility, openness and accountability to all stakeholders, including the National Electoral Management Body;
- Nurture the spirit of nation-building in all institutions of governance including the three arms of Government and the general public in Kenya; and
- Ensure the provision of effective accountability mechanisms and enhance transparency, equity and accountability in the Trust.

1.1 BACKGROUND OF URAIA'S STRATEGIC PLAN

Uraia's Strategic Plan 2016-2020 is themed '*From rights and responsibilities to values and nationhood.*' It focuses on ensuring that Kenyans can espouse and live up to the national values and principles of governance as contained in the Constitution of Kenya, 2010 in order to address negative ethnicity and promote nation building. This is Uraia Trust's second Strategic Plan since inception that changed Uraia from a programme to a trust. The first Strategic Plan was a Programme dubbed the National Civic Education Programme (NCEP). The 2016-2020 Strategic Plan was built on the fundamental lessons learnt from the implementation of the 2011-2015 Strategic Plan, Uraia's experience over the last sixteen years as well as taking into context the current country context. The 2016-2020 Strategic Plan is being implemented through a Programme entitled '*Rooting Democracy Through an Informed Citizenry – Phase Two*'. Phase One of the Rooting Democracy Programme was implemented under the 2011-2015 Strategic Plan between 2014 and 2015.

Through its 2016-2020 Strategic Plan, Uraia is focusing on four main Key Focus Areas (KFAs), which include:

KFA 1: Entrenching constitutionalism – This seeks to enhance citizens' knowledge and adherence to the national values embodied in the Constitution. This will enable citizens to exercise their sovereign power and oversight at both the national and county level over the legislative, executive and judicial arms of government. By entrenching constitutionalism Uraia seeks to address the challenges of weak public institutions, low public participation and citizen apathy.

KFA2: Promoting free and fair elections – This seeks to enhance participation of citizens in the electoral processes, promote transparency and confidence in the management of elections and to empower citizens to elect leaders who embody the spirit and the values of the Constitution.

KFA 3: Addressing the historical political marginalization of women, youth, persons with disabilities, marginalized and minority groups. Under this KFA, Uraia seeks to strengthen the capacity of these marginalized groups to participate in governance processes, while at the same time addressing policy reforms to promote their representation in decision making structures as provided for in the Kenyan Constitution.

KFA 4: Internal excellence. Under this Key Focus Area, Uraia seeks to be a leading national organisation that is responsive to the civic needs of Kenyans.

The activities of Uraia are realized through four Pillars:

- i. **Civic Education** responsible for provision of quality civic education to citizens.
- ii. **Civic Engagement** responsible for providing quality mechanisms that facilitate citizens with opportunities for participation in governance and/or in resolving local or national issues by exercising their rights and responsibilities.

- iii. **Institutional Transformation** responsible for facilitating democratic transformation and institutional development of both State and Non-State Actors.
- iv. **Internal Capacity** responsible for enhancing Uraia’s internal governance structures, accountability, performance, risk management and capacity building.

Uraia Trust would like to undertake a mid-term review of its Strategic Plan 2016 to 2020 in order to inform its future planning for the remainder of the Strategic Plan’s lifetime and to assess its impact in informing, empowering and contributing to the transformation of Kenya to a democratic nation.

2.0 OBJECTIVES OF THE MID TERM REVIEW

The overall objective of the Mid-term Review is to assess the relevance, effectiveness and impact of the Strategic Plan. The review is expected to cover all the components of the Strategic Plan 2016 – 2020 in terms of objectives, strategies/approaches applied and expected results.

The specific objectives of this mid-term review include:

1. To assess the extent to which Uraia has achieved its results in terms of implementation of the Uraia’s Strategic Plan and the set objectives to date;
2. To assess the current external (paying particular attention to devolution and the post election period) and the internal environment and its implications to the implementation of the Strategic Plan.
3. Review of the relevance, effectiveness and efficiency of Uraia’s institutional structure, management and programmes in relation to their objectives, strategies and approaches; and judicious use of resources;
4. Review the performance of Uraia with specific reference to:
 - a. Effective positioning to address its core business and its relevance in the current context in Kenya;
 - b. Its facilitative role in the provision of civic education and civic engagement, policy influencing, lobbying and advocacy on its Key Focus Areas.
 - c. Results based management and results reporting;
 - d. Networks and alliances/coalitions building;
 - e. Financial management, monitoring and reporting;
 - f. Sustainable resource mobilization and funding;
 - g. Uraia’s governance

5. To review the impact and sustainability of the interventions undertaken under the Uraia's Strategic Plan in advancing democracy.
6. Capture lessons learnt and best practice methodologies used in the implementation of the Strategic Plan.
7. Recommend any adjustments with regards to Key Focus Areas, programming, and strategies applied.

3.0 PROPOSED METHODOLOGY

The proposed methodology will include a desk review of Uraia's implementing partner reports, civic educator reports, media programme reports, narrative and financial reports. The review shall also be conducted through selected field visits and interviews with key stakeholders, including but not limited to the ordinary public, civil society groups, national and county government officials, Constitutional Commissions, development partners and the media. It will also include the participation of Uraia staff, Trustees, Civic Educators, Implementing Partners and other key stakeholders through participatory workshops.

A sample size will be determined that ensures coverage of both urban and rural areas, marginalized groups and communities including youth, women and persons with disabilities.

There will be a one-day validation and dissemination workshop that will be held to share the draft review report with the management, programme staff, Implementing Partners, Development Partners and other Stakeholders, before the final report is submitted.

4.0 SCOPE OF THE REVIEW

The review will cover all components of the implementation of the Strategic Plan. Geographically, the review will cover the entire country, and the Consultant will be expected to design a sample size that ensures coverage of both urban and rural areas, marginalised groups and communities including youth, women and persons with disabilities.

5.0 KEY OUTPUTS

Key deliverables of this assignment include:

- (i) A Mid-term review inception report containing detailed methodology and work plan with clear timelines.
- (ii) Data collection tools.

- (iii) A draft review report.
- (iv) A final review report including annexes with the tools used and a softcopy of all data processed.

6.0 TIME FRAME FOR THE ASSIGNMENT

The assignment shall be conducted within a period of not more than **thirty working days** effective from the time of signing the contract until when the final report will be submitted.

7.0 CONSULTANT QUALIFICATIONS

Bidding is open to consultancy firms and individual consultants having proven experience and expertise in carrying out similar programme reviews/evaluations.

It is expected that the Consultant/s will have the following expertise and experience: -

- i. The consultant is expected to hold at least a minimum of a Master's Degree in Social Studies, Public Administration, Law, Political Science, Education, Governance or a related field, relevant educational background and training in evaluation, and knowledge in finance management.
- ii. At least 15 years of demonstrated professional work and consulting experience in the civil society sector in the areas of organizational development, undertaking evaluations and successful strategic plan reviews.
- iii. Broad knowledge of bilateral and multilateral development cooperation.
- iv. Fluency and exceptional drafting and reporting skills in English.

8.0 EVALUATION OF EOI

The evaluation committee appointed by the Trust shall evaluate the expression of interest documents by their responsiveness to the Terms of Reference, applying the requirements as follows:

Table 8.1 Mandatory Requirements

No	Requirements
1	Certificate of Incorporation/Registration Certificate
2	Valid Tax Compliance Certificate
3	VAT and PIN certificates
4	Single Business Permit/ Trade License

5	Financial Audited statements for the last two years i.e. 2016 and 2017.
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NB: Please note that all the above requirements shall all be treated as Mandatory

Table. 8.2: Technical Requirements

No	Requirement
1	Specific experience of the organization in similar assignments
	Minimum 15 years experience in Strategic Planning
	Evidence of undertaking at least three (3) related assignments in the last five (5) years. Provide LSOs/ Contract Documents as evidence
2	Qualification and competence of key staff
2.1	Lead Consultant
2.1.1	At least 15 years demonstrated professional work and consulting experience in the civil society sector in the areas of organizational development, undertaking evaluations and successful strategic plan reviews
2.1.2	Minimum of a Master's Degree in Social Studies, Public Administration, Law, Political Science, Education, Governance or any related field
2.1.3	Executed at least two (2) Strategic Planning reviews/assignments in the civil society sector in the last ten years. Attach at least two (2) Copies of LSOs/ Contract documents to support this
2.1.4	Broad knowledge of bilateral and multilateral development cooperation.
2.1.5	Fluency and exceptional drafting and reporting skills in English
2.2	Other Consultants
2.2.1	Degree in Social Studies, Public Administration, Law, Political Science, Education, Governance or any related field
2.2.2	Minimum of five (5) years experience in Strategic Planning and Performance Management.
2.3	Research Consultant
2.3.1	Degree in Social Sciences from a recognized university

2.3.2	At least five (5) years working experience in data collection, data analysis and data interpretation.
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NB: This is NOT a Request for Proposal. After a review of the EOI Proposals, shortlisting will be done and the most responsive firms will be invited to submit their combined Technical and Financial Proposals through a Request for Proposal document.

9.0 STANDARD FORMS

The consultant is expected to respond to the expression of interest by filling the following standard documents

9.1 Application form 1 Mandatory Requirements

No	Requirements (attach copies)	REMARKS (Y/N)
1	Certificate of Incorporation/Registration Certificate	
2	Valid Tax Compliance Certificate	
3	VAT and PIN certificates	
4	Single Business Permit/ Trade License	
5	Financial Audited statements for the last two years i.e. 2016 and 2017.	

9.2 Application form 2-General Information

1.	Name of firm	
2.	Head office address	
3.	Telephone	Contact
4.	Fax	E-mail
5.	Place of incorporation/registration	Year of incorporation/registration

Nationality of owners		
Name	Nationality	
1.		
2.		
3.		
4.		
5.		

9.3 Application form 3- details of 3 contracts of similar nature and complexity done by the Firm

Details of Bidder’s experience for review of strategic plans for the last 5 years

[Each form is applicable for only one assignment. Therefore, you are required to fill three forms]

Name of Applicant

Use a separate sheet for each contract.

1.	Name of Contract
	Country
2.	Name of Client
3.	Client address
4.	Client Telephone
5.	Client Contact Person
6.	Narrative Description of project (500 words limit)
7.	Value of the total contract
8.	Date of award
9.	Date of completion
10.	Contract duration (years and months) <div style="display: flex; justify-content: space-around; margin-top: 5px;"> - years - months </div>
11	Copies of work orders/ contract documented evidence of work assigned

9.4 application form 4 – personnel capabilities

Name of Applicant

1.	Title of position Name of candidate
2.	Title of position Name of candidate
3.	Title of position Name of candidate
4.	Title of position Name of candidate

Application form (4a) – candidate summary- Each position to fill a separate form

Name of Applicant

Position in this project:		
Candidate information	1. Name of candidate	2. Date of birth
	3. Professional qualifications	
Present employment	4. Name of employer	
	5. Address of employer	
	Telephone	Email
	Job title of candidate	Years with present employer

Summarize professional experience over the last 15 years, in reverse chronological order. Indicate particular technical and managerial experience relevant to the Project.

From	To	Company/Project/Position/Relevant technical and management experience

9.6 Application form 5- details of 2 contracts for strategic plan review in the civil society sector executed by the lead consultant in the last 10 years

[Each form is applicable for only one assignment. Therefore, you are required to fill two forms]

Name of Applicant

Use a separate sheet for each contract.

1.	Name of Contract
	Country
2.	Name of Client
3.	Client address
4.	Client Telephone
5.	Client Contact Person
6.	Narrative Description of project (500 words limit)
7.	Value of the total contract
8.	Date of award
9.	Date of completion
10.	Contract duration (years and months) <div style="display: flex; justify-content: space-around; width: 100%;"> - years - months </div>
11	Copies of work orders/ contract documented evidence of work assigned

Expressions of Interest and accompanying documents should be submitted in plain sealed envelopes clearly marked with the respective title of the assignment and addressed to:

**Executive Director,
Uraia Trust,
Uraia House, Jacaranda Avenue, off Gitanga Road.
P.O. Box 28151 – 00100,
NAIROBI.**

Or

Hand-delivered to Uraia Trust offices located on Jacaranda Avenue off Gitanga road. The deadline for submission is **24th May 2018, 2.00 P.M.**

Any form of canvassing shall lead to immediate disqualification.