

*Uraia Trust*  
*Call for Proposal*  
*Development of strategic framework 2026-2030*  
*Jan 2025*



**URAIA TRUST**

**CALL FOR PROPOSAL**

**DEVELOPMENT OF URAIA'S STRATEGIC FRAMEWORK 2026-2030**

**REF: UT/001/SF/2025**

**CLOSING DATE AND TIME**

**7<sup>TH</sup> OF FEBRUARY 2025 BY 5 PM**

.....

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## **GUIDELINES FOR SUBMITTING PROPOSAL**

The tendering firms are strictly requested to adhere to the following guidelines when submitting the technical proposal.

The tendering firms must submit the technical proposal using only the **standard forms** as provided on the request for proposal document (**NB no extra information that is not requested should be included in the proposal document**)

The submitted technical proposal should follow the following chronological order with dividers or blank pages separating each section.

- i. Technical proposal submission form (page 11)
- ii. Firm's references (page 12) attach the LPOs/contracts and respective reference letters
- iii. Comments and suggestions on the terms of reference (page 13)
- iv. Description of the methodology and work plan (page 14)
  - v. Team composition and task assignments (page 15)
  - vi. Format of curriculum vitae (page 16) attach certificates
  - vii. Activity work schedule for the assignment (page 18)

**(The Tenderer is required to SERIALIZE all pages for each bid (either serially printed or hand typed)).**

The financial proposal sealed separately should also be submitted separately using the provided standard forms as per pages 19, 20, 21, 22 and 23.

## **SECTION I - LETTER OF INVITATION**

**Date: 17<sup>th</sup> of Jan 2025**

### **RE: DEVELOPMENT OF STRATEGIC FRAMEWORK 2026-2030**

- 1.1 Uraia Trust invites your firm to submit a Technical Proposal and a Financial Proposal for developing a strategic framework 2026-2030. The overall objective of this consultancy is to assist Uraia Trust to develop a Strategic Framework for the next five years-2026 to 2030.
- 1.2 A complete set of Request for Proposal and Terms of Reference documents will be downloaded from Uraia trust website at the cost of the consultant or interested firms.
- 1.3 The Request for Proposals (RFP) includes the following documents:
- Section I - Letter of invitation
  - Section II - Information to consultants  
Appendix to Consultants information
  - Section III - Technical Proposal
  - Section IV - Financial Proposal
  - Section V - Terms of Reference

Completed Request for Proposal documents including the Technical and Financial proposal shall be sent separately to the emails below:

- i. Technical Proposals must be submitted via email to [uraiatechnicalstrategicframework2@uraia.or.ke](mailto:uraiatechnicalstrategicframework2@uraia.or.ke)
- ii. Financial Proposals must be submitted via email to [uraiafinancialstrategicframework2@uraia.or.ke](mailto:uraiafinancialstrategicframework2@uraia.or.ke)

The two separate documents shall have the Subject Title on the subject line consecutively as indicated below:

- i. Technical Proposal - Development of Uraia Strategic Framework 2026-2030**
- ii. Financial Proposal - Development of Uraia Strategic Framework 2026-2030**

The Submission deadline for the two proposals shall be on or before **Friday 7<sup>th</sup> February 2025 at 5.00 p.m.**

Yours sincerely

Oliver Waindi

**EXECUTIVE DIRECTOR**

**URAIIA TRUST**

## **SECTION II – INFORMATION TO CONSULTANTS (ITC)**

### **2.1 Introduction**

- 2.1.1 Uraia Trust invites your organization to submit a Technical Proposal and a Financial Proposal, for developing a strategic framework 2026-2030.
- 2.1.2 Please note that the costs of preparing the proposal and of negotiating the contract, including any visit to Uraia Trust are not reimbursable as a direct cost of the assignment.
- 2.1.3 Uraia Trust’s employees, board members, or any organizations associated with them are not eligible to participate.
- 2.1.4 The tender document will be downloaded from the Uraia website at the cost of the tendering firm or interested consultants.

### **2.2 Clarification and Amendment of RFP Documents**

- 2.2.1 Your organization may request a clarification of any content of the request for proposal document only up to **9 days before the proposal submission date**. Any request for clarification must be sent in writing by email using the address indicated below: [inquiriesstrategicframework2@uraia.or.ke](mailto:inquiriesstrategicframework2@uraia.or.ke). Uraia Trust will respond in writing to such requests.
- 2.2.2 At any time before the submission of proposals, Uraia Trust may for any reason, whether at its 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. Uraia may at its discretion extend the deadline for the submission of proposals.

### **2.3 Preparation of Technical Proposal**

- 2.3.1 Your proposal shall be written in English language.
- 2.3.2 In preparing the Technical Proposal, consultants are expected to examine the documents constituting this request for proposal in detail. Material deficiencies in providing the information requested may result in rejection of a proposal.

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

- (i) A brief description of your organization and an outline of three (3) recent experiences on assignments of a similar nature carried out in the last 5 years. Assignment undertaken in governance (civil society sector) will be an added advantage. Assignments for which the lead consultant had a role will also be an added advantage. The outline should indicate *inter alia*, the profiles of the staff proposed, duration of the assignment, contract amount and firm's involvement. **(Standard form page 14,15)**
- (ii) Any comments or suggestions on the Terms of Reference, a list of services and facilities to be provided by Uraia Trust. **(Standard form page 17)**
- (iii) A description of the methodology and work plan for performing the assignment. **(page 18)**
- (iv) The list of the proposed staff team by specialty and the tasks that would be assigned to each staff team member. **(Page 19)**
- (v) CVs recently signed by the proposed professional staff and certified by the 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. **(page 20)**
- (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. **(page 19)**

2.3.4. The Technical Proposal shall not include any financial information and shall be submitted separately as directed in the Letter of Invitation above.

## **2.4. Preparation of Financial Proposal**

- 2.4.1 In preparing the Financial Proposal, your organization is expected to take into account the requirements and conditions outlined in the request for proposal documents.
- 2.4.2 Financial Proposal should follow Standard Forms (page 24,25,26,27,28). The Consultant must indicate all costs associated with this assignment including

- a) remuneration for staff (in the field and at headquarters), and;
  - b) reimbursable expenses. If appropriate these costs should be broken down by activity.
- 2.4.3 The Financial Proposal should clearly identify as a separate amount, the local taxes, duties or other charges imposed under the law.
- 2.4.4 Your organization shall quote the price for the assignment in Kenya Shillings.
- 2.4.5 The Proposal must remain valid for 60 days after the submission date. During this period, your organization is expected to keep available, at your own cost, the professional staff proposed for the assignment. Uraia Trust will make its best effort to complete negotiations within this period. If Uraia Trust wishes to extend the validity period of the proposals, your organization shall be consulted to agree to the extension.

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

- 2.5.1 The original proposal (Technical Proposal and Financial Proposal) shall be prepared in indelible ink. It shall contain no alterations or overwriting, except as necessary to correct errors made by your firm itself. Any such corrections must be initialed by the persons or person authorized to sign the proposals.
- 2.5.2 The Technical Proposal shall be clearly marked on the first page “**TECHNICAL PROPOSAL**,” and the Financial Proposal shall also be clearly marked on the first page “**FINANCIAL PROPOSAL**”. The two proposals shall be sent using separate emails as directed in the Letter of Invitation above.
- 2.5.3 The completed Technical and Financial Proposals must be submitted on or before the time and date stated in the Appendix “Information to Consultants”. Any proposal received after the closing time for submission of proposals shall not be evaluated.
- 2.5.4 Evaluators of Technical Proposals shall have no access to the Financial Proposals until the technical evaluation is concluded. Please note that:
- i. The Financial Proposal should be in the form of a **password protected PDF document**.
  - ii. Do **NOT** include the password within the email or the submission documents.
  - iii. The evaluation team will request the password from the qualified firms/individuals proceeding to the next stage- financial evaluation. The firms/individuals will have scored a minimum of 70% on the technical proposal evaluation.
  - iv. The password request will be via email –  
uraiafinancialstrategicframework2@uraia.or.ke

## **2.6. Evaluation of Technical Proposal**

- 2.6.1 The evaluation committee appointed by the Uraia Trust shall evaluate the proposals based on their responsiveness to the Terms of Reference, applying the evaluation criteria as follows

|    | Criteria                                   | % Score |
|----|--|---------|
| A. | Specific experience of the firm            | 15%     |
| B. | Approach, methodology and workplan         | 35%     |
| C. | Qualifications and experience of key staff | 40%     |
| D. | Unique Value                               | 10%     |

- 2.6.2 Each proposal will be evaluated and given a technical score based on the criteria specified in 2.6.1.

## **2.7. Evaluation of Financial Proposal**

- 2.7.1 The evaluators will not have access to financial proposals until all technical proposals have been evaluated and awarded technical scores. The evaluators shall request the passwords of the financial proposals of the firms that shall have a minimum of 70% score in the technical evaluation. The firms are encouraged to follow the instructions stipulated in 2.5.4 above.
- 2.7.2. The evaluation of the financial proposal shall be of the price including all costs as well as duties and taxes payable on all the materials to be used in carrying out of the assignment. The total score for the financial proposal is 30 points

## **2.8 Negotiations**

- 2.8.1 Negotiations will be held with the winning firm at the same address as “address to send information to the Client” indicated in the Appendix “Information to Consultants”. The aim is to reach agreement on all points and sign a contract.
- 2.8.2 Negotiations will include a discussion of the Technical Proposal, the proposed methodology (work plan), staffing and any suggestions made by your organization to improve the Terms of Reference. Uraia Trust and your organization will then work out final Terms of Reference, indicating activities, and reporting. The agreed work plan and final Terms of Reference will then be incorporated in the “Description of Services” and form part of the Contract. Special attention will be paid to getting the most your organization can offer within the available budget and to clearly defining the inputs required from Uraia Trust to ensure satisfactory implementation of the assignment.



- 2.8.3 The negotiations will conclude with a review of the draft contract. Upon completion of negotiations Uraia Trust and the selected firm will initial the agreed Contract. If negotiations fail, Uraia Trust will invite the firm whose proposal received the second highest score to negotiate a contract.

## **2.9 Award of Contract**

- 2.9.1 The Contract will be awarded following negotiations. After negotiations are completed, Uraia Trust will promptly notify other organizations on the shortlist that they were unsuccessful.

## **2.10 Confidentiality**

- 2.10.1 Information relating to evaluation of proposals and recommendations concerning awards shall not be disclosed to any organization that submitted the proposals or to other persons not officially concerned with the process, until the winning firm has been notified that it has been awarded the Contract.

## **2.11 Corrupt or fraudulent practices**

- 2.11.1. The procuring entity requires that the consultants observe the highest standards of ethics during the selection and award of the consultancy contract and also during the performance of the assignment.
- 2.11.2. The procuring entity will reject a proposal for award if it determines that the consultant recommended for award has engaged in any corrupt or fraudulent practices in competing for the contract in question.

## **Appendix to Information to Consultants**

This section shall complement or amend the provisions of the information to consultants, wherever there is a conflict between the provisions of the information to consultants and the provisions of the appendix, the provisions of the appendix herein shall prevail over those of the information to consultants.

### **Clause Reference**

2.1.1 The name of the Client is: Uraia Trust

2.1.1 Technical and Financial Proposals are expected to be submitted for the development of strategic framework 2026-2030. The overall objective of this consultancy is to assist Uraia Trust to develop a Strategic Framework for the next five years-2026 to 2030.

iii. The email address for any clarifications and enquiries is [inquiriestrategicframework2@uraia.or.ke](mailto:inquiriestrategicframework2@uraia.or.ke). The responses will be through the same email.

2.5.1 The Technical Proposal shall be clearly marked on the first page as “**TECHNICAL PROPOSAL**,” and the Financial Proposal shall also be clearly marked on the first page as “**FINANCIAL PROPOSAL**”.

2.5.2 The two proposals shall be sent using separate emails as indicated below:

a) TECHNICAL PROPOSAL- to be sent as a separate email to [uraiatechnicalstrategicframework2@uraia.or.ke](mailto:uraiatechnicalstrategicframework2@uraia.or.ke).

b) FINANCIAL PROPOSAL- to be sent as a separate email to [uraiafinancialstrategicframework2@uraia.or.ke](mailto:uraiafinancialstrategicframework2@uraia.or.ke).

2.5.3 Points to note for submission of financial proposals:

- i. The Financial Proposal should be in the form of a **password protected, PDF document**.
- ii. Do **NOT** include the password within the email or the submission documents.
- iii. The evaluation team will request the password from the qualified firms/individuals proceeding to the next stage- financial evaluation. The firms/individuals will have scored a minimum of 70% on the technical proposal evaluation.
- iv. The password request will be via email – [uraiafinancialstrategicframework2@uraia.or.ke](mailto:uraiafinancialstrategicframework2@uraia.or.ke)

**2.5.3 Proposals must be submitted not later than 7<sup>th</sup> of February 2025 by 5pm**

### **2.6.1 Technical Evaluation Criteria**

The proposals shall be evaluated using the following criteria and score points:

| No | ITEM | Marks |
|----|------|-------|
| 1  |      | 15    |

|          |   |           |
|----------|---|-----------|
|          | <p>Number of similar assignments undertaken within the governance sector in the last 3 years.</p> <ul style="list-style-type: none"> <li>• <b>3 or more similar</b> Assignments (<b>10 marks</b>)</li> <li>• <b>2 similar</b> Assignments (<b>7 marks</b>)</li> <li>• <b>1 similar</b> Assignment (<b>3 marks</b>)</li> </ul> <p><b>Provide copies of supporting documents (copy of contract/LSO/LPO).</b></p>    | 10        |
|          | <p>Attached recommendation letters from clients, who the above assignments were carried for</p> <ul style="list-style-type: none"> <li>• <b>3 or more matching</b> recommendation letters (5 marks)</li> <li>• <b>2 matching</b> recommendation letters (3 marks)</li> <li>• <b>1 matching</b> recommendation letter (2 mark)</li> </ul>  | 5         |
| <b>2</b> | <b>Proposed methodology, approach and workplan</b>  | <b>35</b> |
|          | <p>Appropriateness/ completeness of description of methodology with reference to TORs in terms of, but not limited to:</p> <ul style="list-style-type: none"> <li>• Analytical review – 4 marks</li> <li>• Situational and context analysis-10 marks</li> <li>• Stakeholder Mapping-5 marks</li> <li>• Strategy formulation- 10 marks</li> <li>• Any added value- 2 marks</li> <li>• Work plan-4 marks</li> </ul> |           |
| <b>3</b> | <p><b>Key professional staff qualifications and competence for the assignment (A formulae will be applied here)</b></p> <p><i>NB: Signed CVs of the Team leader, Associate Consultants &amp; Support staff by each respective owner must be submitted.</i></p>  | <b>40</b> |
| <b>a</b> | <p><b>Lead Consultant (40 marks)</b></p> <p>General education background and professional qualifications, consulting experience in strategic plans development, Knowledge, and experience in undertaking similar assignments in the civil society and democratic governance sector</p> <p>Attached detailed CVs as indicated in the prescribed format</p>   |           |

|   |  |     |
|---|--|-----|
| b | <p><b>Associate Consultants (12 marks)</b></p> <p>General education background and professional qualifications, consulting experience in strategic plans development, Knowledge, and experience in undertaking similar assignments in the civil society and democratic governance sector</p> <p>Attached detailed CVs as indicated in the prescribed format</p>  |     |
| c | <p><b>Support Consultant (8 marks)</b></p> <p>General education background and professional qualifications. No of years' experience in assisting in the development of strategic plans</p>   |     |
| 4 | <b>Unique value</b>  | 10  |
|   | <p>Demonstration of a unique value proposition in the following ways but not limited to:</p> <ul style="list-style-type: none"> <li>• Innovation and adaptability of methodology – 2 marks</li> <li>• Feasibility and practicality – 2 marks</li> <li>• Inclusivity and stakeholder management strategy – 2 marks</li> <li>• Identification of risks, Risk matrix and risk mitigation plan – 2 marks</li> <li>• Relevance of scope, clarity and structure – 2 marks</li> </ul> |     |
|   | Total  | 100 |

The minimum Technical Points (TP) required to pass is: 70% . The minimum technical score requires to qualify for financial evaluation shall be **70 %**. Bidders who attain this pass mark will progress to financial evaluation. Bidders who score less than the pass mark will be considered non-responsive.

**The weights given to the Technical and Financial Proposals are:**

**Technical proposal = 70%**

**Financial proposal =30%**

### **SECTION III: - TECHNICAL PROPOSAL**

#### **3.1 TECHNICAL PROPOSAL SUBMISSION FORM**

[\_\_\_\_\_ *Date*]

To: Uraia Trust

Ladies/Gentlemen:

We, the undersigned, offer to assist in the development of Uraia's strategic framework 2026-2030 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 attached separately.

We remain,

Yours sincerely,

\_\_\_\_\_ [*Authorized Signature*]:

\_\_\_\_\_ [*Name and Title of Signatory*]

\_\_\_\_\_ [*Name of Firm*]

\_\_\_\_\_ [*Address:*]

### 3.2 FIRM'S REFERENCES

**Relevant services carried out for 3 clients in the last 5 years that best illustrate your qualifications**

Using the format below, provide information on each assignment for which your firm was legally contracted. **Please attach proof inform of LPO/ Contract for each reference and respective recommendation letter from the client.**

|  |  |
|--|--|
| 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<br>(Month/Year):                                     | Approx. Value of Services (Kshs)                                 |
| Name of Associated Consultants. If any:  | Months of Professional Staff provided by Associated Consultants: |
| Name of Senior Staff (Project Director/Coordinator, Team Leader) Involved and Functions Performed: |  |

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*Jan 2025*

Narrative Description of project:

Description of Actual Services Provided by Your Staff:

Firm's Name: \_\_\_\_\_

Name and title of signatory; \_\_\_\_\_

**3.3 COMMENTS AND SUGGESTIONS OF YOUR FIRM ON THE TERMS OF REFERENCE AND ON DATA, SERVICES AND FACILITIES TO BE PROVIDED BY THE URAIA TRUST.**

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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.



### **3.4 DESCRIPTION OF THE METHODOLOGY AND WORK PLAN FOR PERFORMING THE ASSIGNMENT**

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Provide a section on **Approach, Methodology and Work plan** for performing the assignment that should include but not limited to

- Analytical review
- Situational and context analysis
- Stakeholder Mapping
- Strategy formulation
- Any added value-
- Work plan

### **3.5 TEAM COMPOSITION AND TASK ASSIGNMENTS**

#### **1. Technical/Managerial Staff**

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

#### **2. Support Staff**

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

**3.6 FORMAT OF CURRICULUM VITAE (CV) FOR PROPOSED PROFESSIONAL STAFF**

The Consultant shall provide a signed CV of each of the Key Personnel on the Format of Curriculum Vitae for individual Consultants outlined below.

**a) Identification**

1. Full Names: \_\_\_\_\_
2. Nationality: \_\_\_\_\_
3. Years of Working experience: from \_\_\_\_\_ to \_\_\_\_\_
4. Present Position \_\_\_\_\_
5. Key Personnel position in the Proposal \_\_\_\_\_

**b) Education**

|  | Institution / Dates | Degree(s) or Diploma(s) obtained: |
|--|---------------------|-----------------------------------|
|  |                     |                                   |
|  |                     |                                   |
|  |                     |                                   |
|  |                     |                                   |
|  |                     |                                   |
|  |                     |                                   |
|  |                     |                                   |

**c) Membership of Professional Bodies**

Provide information Professional Bodies that the staff belongs, including year of enrollment.

**d) Key qualifications/skills and experience**

Give an outline of staff member's skills and training most pertinent to tasks on assignment

**e) Employment record**

Provide information on employment, giving for each employment dates of employment, name of employer, positions held and tasks of the employment

Highlight information on employment tasks that best illustrate staff capability to handle the tasks under the assignment.

**f) Professional experience**

If the staff member has worked as a consultant, provide work experience and assignments carried out using the format of the form below.

| No. | Date (from – to) | Location/ Country | Company & reference person | Position | Description of Assignment |
|-----|------------------|-------------------|----------------------------|----------|---------------------------|
|     |                  |                   |                            |          |                           |
|     |                  |                   |                            |          |                           |
|     |                  |                   |                            |          |                           |
|     |                  |                   |                            |          |                           |
|     |                  |                   |                            |          |                           |

**g) Certification:**

I, the undersigned, certify that to the best of my knowledge and belief, this CV correctly describes me, my qualifications, and my experience. I understand that any willful misstatement described herein may lead to my disqualification or dismissal, if engaged.

*Uraia Trust*  
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*Jan 2025*

\_\_\_\_\_ **Date:** \_\_\_\_\_  
*[Signature of staff member]*

\_\_\_\_\_ **Date;** \_\_\_\_\_  
*[Signature of authorized representative of the firm]*

**Full name of staff member:** \_\_\_\_\_

**Full name of authorized representative:** \_\_\_\_\_

### 3.7 ACTIVITY WORK SCHEDULE FOR THE ASSIGNMENT

The Consultant will prepare an activity schedule that will take care of all phases of the assignment using the following format

|   | ACTIVITY           | Number of Staff required | Number of weeks required | WEEK |   |   |   |   |
|---|--------------------|--------------------------|--------------------------|------|---|---|---|---|
|   |                    |                          |                          | 1    | 2 | 3 | 4 | 5 |
| 1 |                    |                          |                          |      |   |   |   |   |
| 2 |                    |                          |                          |      |   |   |   |   |
| 3 |                    |                          |                          |      |   |   |   |   |
| 4 |                    |                          |                          |      |   |   |   |   |
| 5 |                    |                          |                          |      |   |   |   |   |
| 6 |                    |                          |                          |      |   |   |   |   |
| 7 | Submit full Report |                          |                          |      |   |   |   |   |

## **SECTION IV: - FINANCIAL PROPOSAL**

### **4.1 FINANCIAL PROPOSAL SUBMISSION FORM**

\_\_\_\_\_ [ Date]

To: Uraia Trust

P. O. Box 28151-00100

Nairobi

Ladies/Gentlemen: We, the undersigned, offer to assist in the development of Uraia's strategic framework 2026-2030 *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,

**4.2 SUMMARY OF COSTS**

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

\_\_\_\_\_ *[Authorized Signature]*

\_\_\_\_\_ *[Name and Title of Signatory]:*

\_\_\_\_\_ *[Name of Firm]*

\_\_\_\_\_ *[Address]*



**4.3 BREAKDOWN OF PRICE PER ACTIVITY**

|   |                               |
|---|-------------------------------|
| Activity NO: _____  | Description: _____            |
| Price Component   | Amount(s)                     |
| Remuneration<br><br>Reimbursables<br><br>Miscellaneous Expenses<br><br>Subtotal | <br><br><br><br><br><br>_____ |

**4.4 BREAKDOWN OF REMUNERATION PER ACTIVITY**

| Activity No. _____ Name: _____ |           |                                      |                    |        |
|--------------------------------|-----------|--------------------------------------|--------------------|--------|
| Names                          | Positions | Input (staff, months, days or hours) | Remuneration Rates | Amount |
| Regular staff                  |           |                                      |                    |        |
| (i)                            |           |                                      |                    |        |
| (ii)                           |           |                                      |                    |        |
| Consultants                    |           |                                      |                    |        |
| Grand Total                    |           |                                      |                    | _____  |

**4.5 REIMBURSABLES PER ACTIVITY**

Activity No: \_\_\_\_\_ Name: \_\_\_\_\_

| No | Description | Unit | Quantity | Unit Price | Total Amount |
|----|-------------|------|----------|------------|--------------|
| 1  | Air travel  |      |          |            |              |
| 2  | Road travel |      |          |            |              |
| 3  | Rail travel |      |          |            |              |
| 4  | Subsistence |      |          |            |              |
| 5  | Allowance   |      |          |            |              |
|    | Grand Total |      |          |            |              |

## **SECTION V: - TERMS OF REFERENCE FOR STRATEGIC FRAMEWORK DEVELOPMENT 2026 – 2030**

### **1.0 INTRODUCTION**

Uraia Trust is a facilitative national organisation whose mission is *“To provide quality civic education and empower Kenyans to exercise their civic duty in order to realize their constitutional aspirations.”*

Uraia’s mandate is set out in its constitutive instrument, the Trust Deed, and includes:

- a) Initiate, develop, manage, and monitor civic education and engagement in Kenya.
- b) Initiate, nurture, supervise, and coordinate groups that have been or will be formed for the purpose of promoting and developing the civic education program.
- c) Mobilise resources and develop partnerships to support gender-responsive civic education and engagement.
- d) Support the development objectives and or support the development of the organisational capacity of partners and or participating organisations supported by the Trust.
- e) 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.
- f) Facilitate gender-responsive civic education and engagement through affirmative action of the youth, minorities, marginalized groups, and people with disabilities.
- g) 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.
- h) Nurture the spirit of nation-building amongst all institutions of governance including the three arms of Government and the general public in Kenya; and
- i) Ensure the provision of effective accountability mechanisms and enhance transparency, equity, and accountability in the Trust.

Uraia discharges this mandate through Strategic plans or frameworks with the current one being for the period 2021-2025. The current Strategic Framework, available on Uraia’s website, focused on the goal of “an empowered, engaged and values-based citizenry.”

### **2.0 OBJECTIVE**

The primary objective of the consultancy is to assist Uraia Trust to develop a robust Strategic Framework for the period 2026 to 2030, that is aligned to the Trust’s mandate and mission, and which earns the commitment and ownership of the Trust’s key stakeholders.

The specific objectives of the assignment shall include:

- a) Undertake an internal analysis of the Trust to understand Uraia's mission, vision, values and performance against the previous Strategic framework, its continued relevance and comparative advantage, and distill the key challenges and lessons that will inform the 2026-2030 Strategic Framework.
- b) Conduct an external analysis of the global, national and sector context against Uraia's mandate and strategy, and provide insights that will make the 2026-2030 Strategic Framework more relevant, impactful and continue to curve out Uraia's niche.
- c) Engage Uraia's leadership, staff and key stakeholders in developing a robust Strategic Framework that takes into account a clearly defined theory of change, any priorities that require to be carried forward as well as new ground to be covered during the strategy period. The Strategic framework should be capable of translation into implementation plans, including recommendations relating to resource and capacity requirements, as well as performance, accountability and learning processes.
- d) Present the draft Strategic Framework to the leadership of the Trust and incorporate recommended revisions.
- e) Validate the proposed Strategic Framework with key stakeholders.

### **3.0 APPROACH AND METHODOLOGY**

The Consultant will be at liberty to set out their approach and methodology which is expected, at a minimum, to include the following:

- a) **Inception phase** - This will include mobilisation of the team, preliminary review of documents, confirmation of the approach and methodology as well as work plan to deliver the assignment. Any issues requiring resolution or clarification with the leadership of Trust will be concluded during this phase. Within one month of commencement, the Consultant will be expected to deliver an Inception report that is consistent with their proposal and takes into account any new insights obtained during this inception phase. This Inception Report will be the primary basis for assignment control and monitoring.
- b) **Document review** – As part of the process of developing the Strategic Framework, the Consultant will be required to carry out a review of various documents including but not limited to: Trust Deed; previous Strategic Plans/ Frameworks; various performance, monitoring and evaluation reports, Scenarios reports; global, national and sector reports; and any other reports that the Consultant may identify as relevant to the assignment.
- c) **Generate global, continental, national and sector insights** – The Consultant will be required to bring a global mindset and clearly demonstrate in their proposal the unique value they will add by bringing current thought leadership relevant to Uraia's mandate and the context in which the Trust will operate during the strategy period.
- d) **Comprehensive stakeholder mapping and analysis** - This will involve consultations and mapping of key stakeholders and their role or contribution to delivering the Strategic Framework. Such stakeholders will include but not limited to: Uraia leadership and staff; general public, civil society groups, Uraia Civic Educators and Implementing Partners, government officials, Constitutional Commissions, Development Partners, and the media.
- e) **Strategic Framework development** – The Consultant will be required to clearly articulate the approach to consolidating all strands into a coherent and robust Strategic Framework, that is owned, and understood by a critical section of stakeholders, and capable of winning their commitment to its implementation.

- f) **Prepare draft Strategic Framework** – This will require the Consultant to prepare and present a draft Strategic Framework to the Uraia Leadership and obtain final sign –off to produce a Draft Final Strategic Framework which will be subject to final validation.
- g) **Validate and issue final Strategic Framework** - Uraia leadership together with the consultant will engage a diverse set of stakeholders and the Uraia ecosystem to validate the Draft Final Strategic Framework.

#### **4.0 DELIVERABLES AND TIME FRAME**

Uraia Trust expects to have concluded the selection of the suitable consultant and contract signed by 28 February 2025. The deliverables and related timelines are set out below.

| <b>DELIVERABLE</b>   | <b>TIMELINE</b> |
|--|-----------------|
| a) An inception report within one month of signing the agreement | 31 March 2025   |
| b) Stakeholder mapping and analysis                              | 30 April 2025   |
| c) Draft Strategic Framework                                     | 30 June 2025    |
| d) Final Strategic Framework (validated) –                       | 31 July 2025    |

The Consultant will be at liberty to propose and justify their own timelines based on their unique approach and methodology.

#### **5.0 QUALIFICATIONS, SKILLS & EXPERIENCE**

The Consultant/Consultancy firm selected will be required to have the following expertise:

- a) A Master’s degree in Strategic Management or any other relevant Social Sciences from a recognized University.
- b) Extensive demonstrable experience in strategy and organizational development for civil society organisations working in the area of governance. Experience in strategy development for not-for-profit sub-granting organisations will be an added advantage.
- c) Good understanding of Kenya’s governance, civil society, and civic education context.
- d) Experience in developing strategies focusing on the inclusion of minority and marginalised groups, applying gender analysis and value for money principles.
- e) Extensive experience in learning, documentation, monitoring, and evaluation.
- f) Extensive experience in budget formulation and resource mobilization.
- g) Experience in working with community groups, media, and disability groups.
- h) Strong research and analytical skills with the ability to listen and effectively communicate.
- i) Ability to consolidate ideas from multiple stakeholders, and work under pressure within stipulated timelines and with minimal supervision.

## **6.0 MANAGEMENT OF THE ASSIGNMENT**

The Consultant shall deliver the final Strategic Framework to the Board of Trustees. Day to day management of the assignment shall be through the Executive Director who shall work with the Senior Leadership Team. All stakeholder and validation workshops will be funded outside the consultancy budget.

## **7.0 EVALUATION CRITERIA**

Technical proposals will be evaluated against the criteria set out below:

| <b>Criteria</b>                               | <b>% Score</b> |
|---|----------------|
| A. Specific experience of the firm            | 15%            |
| B. Approach, methodology and work plan        | 35%            |
| C. Qualifications and experience of key staff | 40%            |
| D. Unique value                               | 10%            |

Only Technical proposals that score a minimum of 70% will proceed to the evaluation of the Financial proposal.

## **8.0 SUBMISSION OF SEPARATE TECHNICAL AND FINANCIAL PROPOSALS**

### **8.1. Submission Guidelines**

#### *a. Format and Separation of Proposals*

**Technical Proposal:** The Technical Proposal must outline the consultant’s understanding of the assignment, methodology, approach, work plan, and relevant experience.

**Financial Proposal:** The Financial Proposal should detail all costs associated with the assignment, including fees, travel, and other reimbursable expenses. The financial proposal will not be opened until the conclusion of the technical evaluation.

Please note that:

- i. The Financial Proposal should be in the form of a **password protected, PDF document**.
- ii. Do **NOT** include the password within the email or the submission documents.
- iii. The evaluation team will request the password from the qualified firms/individuals proceeding to the next stage – financial evaluation. The firms/individuals will have scored a minimum of 70% on the technical proposal evaluation.
- iv. The password request will be via email - [uraiafinancialstrategicframework2@uraia.or.ke](mailto:uraiafinancialstrategicframework2@uraia.or.ke)

Ensure that the Technical and Financial proposals are submitted online **ONLY** as separate documents to two separate Email addresses as below.

*b. Delivery Method*

***Email Submission Instructions:***

- i. Technical Proposals must be submitted via email to [uraiatechnicalstrategicframework2@uraia.or.ke](mailto:uraiatechnicalstrategicframework2@uraia.or.ke)
- ii. Financial Proposals must be submitted via email to [uraiafinancialstrategicframework2@uraia.or.ke](mailto:uraiafinancialstrategicframework2@uraia.or.ke)

*c. Submission Date and Time*

Proposals must be submitted by February 7, 2025, at 5:00 PM EAT. Late submissions will not be accepted.

**8.2 Evaluation Criteria**

*a. Technical Proposal Evaluation*

Proposals will be evaluated based on the criteria outlined in the Request for Proposal, including methodology, expertise, and experience.

Only Technical Proposals scoring a minimum of 70% will proceed to the evaluation of Financial Proposals.

*b. Financial Proposal Evaluation*

Financial Proposals will be evaluated for cost-effectiveness and alignment with the proposed methodology.

**8.3. Contact Information for Inquiries**

For any clarifications or questions, please contact the Uraia Trust team via the following email address – [inquiriestrategicframework2@uraia.or.ke](mailto:inquiriestrategicframework2@uraia.or.ke)

All communications should be made via the above email addresses.

**9.0 CONFIDENTIALITY**

The consultant shall not either during the term or after termination of the assignment, disclose any proprietary or confidential information related to the consultancy service without prior written consent. Proprietary interests on all materials and documents prepared by the consultant under the assignment shall become and remain properties of Uraia Trust.