



**International Co-operative
Alliance – Africa**
A Region of the International
Co-operative Alliance

Loresho Mukabi Road, opposite Coopers Ltd; House No.17, P.O. Box 67595, Nairobi 00200, Kenya, Tel: +254 20 2323489
E-mail: info@icaafrica.coop Website: www.icaafrica.coop

Request for Proposal

PROJECT:

THE INTERNATIONAL COOPERATIVE ALLIANCE — AFRICA

STRATEGIC PLAN

INSTRUCTION TO BIDDERS

PROPOSAL SUBMISSION RULES AND PROCEDURES

1. Rule for submissions

- 1.1. The service provider must be a legal entity with all other necessary expertise.
- 1.2. Original Tax Clearance certificate dated within twelve (12) months of the proposal must be submitted.
- 1.3. Be registered with the country revenue Authority. Proof certificate of registration together with the number must be provided as part of the proposal. The 80/20 preference points will be used to evaluate the proposals. Proposals submitted by service providers whose registration is not finalized by the closing date will be disqualified and eliminated from evaluation.
- 1.4. Service Providers are required to declare in writing, as part of their proposal submissions, that they have no conflict of interest in acting for the International Co-operative Alliance - Africa (ICA-Africa) in this assignment.
- 1.5. ICA-Africa shall enter into agreement with the selected service provider for the work set out in these Terms of Reference. In the event of any conflict arising between the Terms of Reference and the agreement, the agreement will prevail.
- 1.6. The persons proposed for the professional work on the assignment shall themselves carry out the work, unless permission is granted by ICA-Africa to replace them. Such permission will only be granted in exceptional circumstances.
- 1.7. The cost of preparing proposals and of negotiating the contract is not reimbursable.

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- 1.8. ICA-Africa is not bound to accept any proposals submitted and reserve the right to negotiate price with the preferred service provider and to request improvements to the service provider's team if deemed necessary.
- 1.9. ICA-Africa reserves the right to interview short-listed service providers if required and /or call for the best and final offers from one or more service providers.
- 1.10. Any effort by the service provider to influence proposal evaluation, proposal comparisons or proposal award decisions in any manner, will result in rejection of the proposal concerned.
- 1.11. Copyright, patent rights and other similar rights in any works or products created as a result of the performance of this project / assignment shall vest in and are hereby transferred to ICA-Africa for approval, unless specifically agreed to otherwise, in the form of individual written Agreement signed by both parties.
- 1.12. For this purpose only, all works created in terms of this project / assignments thereof shall be deemed to have been created under control and direction of ICA-Africa and be the property of ICA-Africa.
- 1.13. All information documents, records and books provided by ICA-Africa to any service provider in connection with the proposal or otherwise are strictly private and confidential.
- 1.14. Any proposer to any third party shall not disclose them, except with the express consent of ICA-Africa, which shall be granted in writing prior to such disclosure. ICA-Africa however, reserves the right to disclose any information provided by the service provider to any of its employees.
- 1.15. ICA-Africa reserves the right to terminate the contract of any assignment to any party if there are reasonable grounds for considering that there is non-performance by the contracted service provider. ICA-Africa also reserves the right to curtail the scope of the assignment awarded or to curtail any aspect of the assignment by mutual agreement. In the event of any such cancellation or curtailment, the service provider shall have no claim or recourse against ICA-Africa, of whatever nature, save the recoupment of the service provider's actual and reasonable costs already expended on the project.
- 1.16. ICA-Africa requires no bid surety, but services providers should note that ICA-Africa reserves the right to review this position at contractual stages.
- 1.17. ICA-Africa reserves the right to downscale the required services should the need arise; however, this will be done on a consensus basis.
- 1.18. The proposal must remain valid for the period of the assignment. Prices indicated in the proposal must remain firm for the duration of the assignment after the award has been made.
- 1.19. ICA-Africa reserves the right to visit the premises of the shortlisted service providers prior to the assignment being awarded and after the contract has been signed

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2. Proposal Evaluation Criteria and scoring

2.1 Evaluation of proposals will be based on (Two–Envelope System)

2.2 It is requested that two envelopes; one for the functionality proposal and the other for the financial proposal be submitted separately in one big envelope.

2.3 The proposal with functionality aspect will be opened and evaluated first. Technical proposals that achieve the minimum functionality score (24 points) will qualify for the second stage of evaluation, i.e. the evaluation of corresponding financial proposals. Financial proposals for non-responsive functionality proposals will be returned to the service providers unopened.

2.4 The Evaluation Committee will evaluate the proposals received by the deadline according to the criteria indicated herein, and will make a recommendation to the Regional Director for appointment of the preferred service provider

2.5 The decision by the Regional Director will be final

2.6 Any proposal not submitted substantially in accordance with the proposal submission requirements may, at the discretion of the Evaluation Committee be rejected as unsuitable for evaluation

2.7 The successful bid shall be the one who meets any of the criteria referred to in Section 86 (1) of the Public Procurement and Disposal Act 2015 of the Government of Kenya, including the lowest price and the financial and technical proposal with the highest score determined by ICA-Africa

Price	Points	Preference	Points
Price	50% (of 80) = 40 points	Women	8
Functionality	50% (of 80) = 40 points	Youth	8
		Disabled	4
Total Points	80 points		20 points

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- 2.8 The Functionality and Preference Points will be evaluated according to the criteria and scoring system outlined in the table above.
- 2.9 ICA-Africa reserves the right to request any service provider to avail itself for a presentation on their respective proposals prior to the final selection. Should a service provider choose not to provide such a presentation, ICA-Africa reserves the right not to select that service provider.
- 2.10 The proposal which achieves the highest total points out of 100 will be recommended by the Evaluation Committee to the Regional Director for award.

3. Evaluation Formulae

3.1 Functionality Calculation Formulae

$$Ps = \frac{So}{Ms} \times Ap$$

Where

Ps = percentage scored for functionality by bid/proposal under consideration

So = total score of bid/proposal under consideration

Ms = maximum possible score

3.2 Price Calculation Formulae

$$Ps = \frac{P_{\min}}{P_t} \times Ap$$

Where

Ps = percentage scored for price by bid/proposal under consideration

Pmin = lowest acceptable bid/proposal

Pt = price of bid/proposal under consideration

Ap = percentage allocated for price

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4. Procedures for submission

- 4.1 The Request for Proposals shall be open 8 hours a day, for 5 working days until **12th May 2022 COB**
- 4.2 The two-envelope proposal will be submitted strictly by email.
- 4.3 It is the responsibility of the service providers to ensure that their proposals are submitted before / or on the deadline date

ICA-Africa will only consider proposals that are submitted by email on within the date and time set out in clause 4.1 above.

5. Company Profile

A Company Profile detailing previous similar work history and experience must be attached to the proposal

Under no circumstance will late bids be considered.

Submissions must be sent to the following contacts on or before the deadline of **12th May 2022**.

Organization: International Cooperative Alliance – Africa (ICA-Africa)

Email: info@icaafrica.coop **with a copy to** chiyoge.sifa@icaafrica.coop

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TERMS OF REFERENCE (TOR)

The International Cooperative Alliance (ICA) is a non-governmental cooperative federation representing cooperatives and the cooperative movement worldwide. It was founded in 1895. The ICA maintains the internationally recognized definition of a cooperative in the Statement on the Cooperative Identity. The International Cooperative Alliance unites cooperatives worldwide. It is the custodian of cooperative values and principles. ICA makes the case for cooperatives and their distinctive value-based economic business model which also provides individuals and communities with an instrument of self-help and influence over their socio-economic development. The ICA advocates the interests and successes of cooperatives, disseminates best practices and know-how, strengthens their capacity building and monitors their performance and progress over time.

ICA Africa is one of the four regional offices of the International Cooperative Alliance which serves, unites and represents ICA's member organizations in Africa. ICA Africa promotes and strengthens autonomous and viable cooperatives throughout the region by: Serving as a forum for exchange of experience and a source of information on cooperative development, research, and statistics. Providing technical assistance for Cooperative development. Collaborating with National Governments, United Nations Organizations, Development Partners and African Regional Development and Bi-lateral organization.

The Regional office has been in operation for over forty-five years initially headquartered in Moshi, Tanzania since 1968 with a sub-regional office in West Africa and later in 2004 being relocated to Nairobi with a merger of the two offices.

The ICA Africa Regional Office, in conjunction with the Africa Cooperative Movement and governments officials in charge of Cooperatives developed and launched in Cape Town, South Africa on November 6, 2013, the Africa Cooperative Development Strategy 2013-2016 which is aimed at addressing the Africa special development goals of improving members' socio-economic situation using the Cooperative model of enterprise.

However, the strategy document period is coming to an end by December 2016, hence; the Office has resorted into hiring an external consultant. To achieve the objectives of this contract, it is important that the selected consulting firm(s) have the following qualifications in their team:

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- A University Degree, preferably a master's degree and above in Co-operative Development, Agriculture Economics, Statistics with sound knowledge and experience in Africa;
- Proven experience of studies done in the field of co-operative development, organizational development and / or Agricultural studies in Africa;
- Demonstrable knowledge and experience of the role of co-operatives in empowerment and poverty reduction; and adherence with co-operative values and principles.
- General knowledge of trade policies relevant to the co-operative movement in Africa.

This assigned is structured in two parts. Part 1 is the Audit, and Part 2 is the Formulation of Alliance Africa Cooperative Development Strategy 2022-2030. Part 1 is concluded after the May Conference, while Part 2 is concluded after the October Conference. The total person days for this assignment will be 16 days.

Part 1: Strategic Audit

Strategy audit is an approach for monitoring, appraising and measuring the strategic performance of an organization. It is also called Post Evaluation Review and Maintenance because in addition to correcting problems uncovered during the post implementation review, an organization would want to fine-tune its strategy management process in accordance with changing needs of its environment. This is essential in order to optimize the effectiveness of the Strategy Management process, a process that starts immediately after the formulation of the Strategic Plan.

1. Key Results Areas/Strategic Interventions of the Africa Cooperative Development Strategy

The Development Strategy (DS) emphasizes the need to facilitate cooperative organizations and their members to pursue their social, economic and environmentally sustainable interests effectively and efficiently through the co-operative business model by means of:

- elevating participation within membership and governance to a new level;
- positioning co-operatives as builders of sustainability;
- building the co-operative image and securing the co-operative identity;

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- ensuring supportive legal frameworks for co-operative growth; and
- securing reliable co-operative capital while guaranteeing member control.

2. Scope of the Audit

This audit assumes that ICA has over the plan period 2017-2021 undertaken a number of implementation audits. In this respect this particular Audit which starts in Nairobi in May 2022 followed by a wider interactive session with the Board and technical teams in Kenya will serve as a learning and evaluation exercise which will inform the formulation of ICA Africa Future Direction to be shared in Egypt in October 2022 with the ICA Africa fraternity. Within this framework we propose to:

- a) Assess the impact of the core components of the Development Strategy 2017-2021 to the target persons and its contribution to Africa's economics and social structure, and environmental development
- b) Examine the process (mechanisms and products) relevance, efficiency and effectiveness, materiality and sustainability at all levels of implementation
- c) At institutional level, the Audit will
 - Appraise how well ICA Africa has done in terms of the thematic issues laid down in the DS. This will tell how efficient and effective ICA-Africa has been, over the period 2017-2021 April, in addressing the needs and expectations of its members and in meeting the demands of the general public;
 - Ascertain whether the objectives set for the DS plan period and subsequently were appropriate and attainable within given resources and resource constraints;
 - Ascertain whether the major policies and strategies are in line with the ICA-Africa mandate;
 - Examine the incentive structure put in place to ensure effective implementation and realization of the DS, and how the performance of the Board and executive form an integral part of the DS implementation process;
 - Examine and evaluate the setting and operation of the management information system and how it has been operated in the honest, complete and quick reporting of results of the DS at all levels;

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- Assess the future environment in which ICA-Africa is going to operate to optimize on effort.

d) Document lessons learnt at different levels of the cooperative structure, and ICA-Africa and its partnership with development partners in the economic, social and environmental development of Africa, particularly the member countries

The key actors in this audit will include:

- The ICA-Africa Board
- The ICA-Africa Technical Teams
- The ICA-Africa management and staff
- Ministers and Ministries responsible for cooperatives development
- The cooperative apex institutions representing member countries (particularly
- Partners and specialized organisations involved with and in cooperatives development

The financial sector and mechanisms and opportunities available to the cooperative movement

3.Anticipated Time Frames

The Audit is scheduled to take 16 days during which the consultant should carry out the following:

Activity	Location	Time Frame
Review Available Literature and Reports on the implementation of the previous strategies	On-line	May-September 2022
Prepare a general overview of the 2022-2030 DS in terms of Vision, Mission, Strategic Interventions, Targets, Activities and Outputs	On-line	May-September 2022
Determine the relevance of ICA-Africa Interventions in a	On-line	May-

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dynamic global social and economic environment		September 2022
Review Implementation Framework in terms of programs, human and financial resources, and governance arrangement	Kenya	May-September 2022
Review Participation and sustainability strategies	On-line	May-September 2022
Review current social and financial strategies/set-up	On-line	May-September 2022
Conclusions and Recommendations	Egypt	October 2022
Strategic Plan 2022-2030 Report	Kenya	October 2022

4. Audit Criteria

We propose to use the following yardsticks measuring the implementation of the strategic plan:

- Growth in terms of membership, outreach, networking and image (stature); quality, and portion of GDP traceable to cooperatives;
- Relevance of delivery mechanisms and products;
- Efficiency and effectiveness in resource mobilization, application and attainment of results;
- Asset utilization capacity at ICA-Africa, and member organisations
- Good corporate governance and leadership ICA-Africa and member organisations
- Sustainability and Institutionalization of organization and methods for effective service design, packaging and delivery

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Management effort to add value to the mandate and purpose of the institution of ICA-Africa.

Part 2: Formulation of Direction Towards 2022

We note that ICA-Africa will continue to operate within the framework of the ICA Blue print for Cooperative Development Decade 2011-2020. In this respect the key pillars of Participation, Sustainability, Identity, Capital and Legal framework will be retained through the 2017-2020 Development Strategy

Part Two will commence immediately after the May Conference and finalize through the Egypt Conference in October 2022.

The process will be divided into four stages. This process will make 16 consultancy days

Stage 1: Further interrogation of findings of the Audit and engagement of members through a questionnaire designed to gather their insights into the priority areas and expected outputs

Stage 2: Preparation of the Draft 2022-2030 ICA-Africa Development Strategy and sharing on line with Board and Technical Committee Teams

Stage 3: ICA-Africa DS Validation Workshop (sideline of the Egypt Conference)

Stage 4: Final ICA-Africa 2022-2030 Development Strategy Directions Towards 2020

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BID REQUIREMENTS

1. Standard Bid Documentation

Bidders will be required to submit **SEPARATE** attachments; technical and financial proposals in clearly marked emails.

Organizing and Methodology

Bidders should set out the approach, methodology and organizing for achieving the contract objectives. It should explain why the approach is appropriate to achieving the TOR. It should also detail how the bidder will organize themselves to deliver on the TOR. This section should also set out variables and risks associated with the achievement of the assignment.

Personnel Profiles

Concise and succinct CV with technical qualifications, experience and competency in relation to achieving the respective project objectives and associated activities of the work plan, together with traceable references of the nominated individuals must be provided in the required format as per **Annexure 1**

All the proposed experts must also sign statements of availability (**Annexure 2**)

The corporate profile(s) of the principal and any subcontractors, where applicable are not required

2. Project Proposal

Bidders will be required to submit **SEPARATE technical** and **financial** proposals.

2. TECHNICAL PROPOSALS

The Technical proposal will comprise the following elements:

- Understanding of the context and the assignment

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- Organization and methodology
- Proposed team composition and key experts' profile

The bidder must outline their **Understanding** of the research context and their understanding of the overall assignment.

The **Organization and Methodology** section should set out the approach, methodology and organization for achieving each of the output areas. This should include the Organizational structure, vision (ideas about the project, feasibility of their ideas) and methodology (including rationale, strategy and timetable). The section should also set out the variables and risks associated with the assignment.

The technical proposal must set out the proposed **Team composition and Key Experts Profile**. The key experts are those whose involvement is considered to be instrumental in the achievement of the contract objectives. The CV's of the key experts must be provided in the required format (see attached example Annex. 1). The key experts must also sign statements of availability (Annex. 2).

3. FINANCIAL PROPOSALS

The Financial offer must contain two separate elements:

- Budget Breakdown
- Cash flow forecast

The budget breakdown will include:

- The estimated number of days per expert and other personnel and fee rate per expert/personnel and output.
- The incidental and disbursement costs (including travel, stationery etc.) (including outsourced or in sourced costs not covered by key experts' fee days) per output.
- Any additional costs.

4. EVALUATION CRITERIA

Proposals will be assessed according to the following criteria **(Annexure3)**

Functionality including:

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- Understating of the context and overall assignment
- Organizing, approach and methodology (including organization structure and methodology)
- Key expert personnel proposed

There is a separate formula for preference points that will be added to the total technical and financial scores.

ANNEXURE 1 : CV FORMAT

CURRICULUM VITAE (max 3 pages)

Proposed Role in the Project:

1. Family name:
2. First names:
3. Date of birth:
4. Nationality:
5. Civil status:
6. Education:

Institution [Date from - Date to]	Degree(s) or Diploma(s) obtained:

7. Language skills: Indicate competence on a scale of 1 to 5 (1 - excellent; 5 basic)

Language(s)	Reading	Speaking	Writing

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8. Membership of professional bodies: -
9. Other skills: (e.g. Computer literacy, etc.)
10. Present position:
11. Years within the firm:
12. Key qualifications: (Relevant to the project)

13. Professional Experience

5. Date from - Date to	6. Location	7. Company	8. Position	Description of projects/responsibilities etc.

14. Other relevant information (e.g., Publications)

ANNEXURE 2: Statement of exclusivity and availability

Quotation ref: _____

I, the undersigned, hereby declare that I agree to participate exclusively with the bidder _____ (bidder *name*) in the above-mentioned service bid procedure. I further declare that I am able and willing to work for the period(s) foreseen for the position for which my CV has been included.

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From	To
< <i>start of phase 1</i> >	< <i>end of phase 1</i> >
< <i>start of phase 2</i> >	< <i>end of phase 2</i> >
< <i>etc.</i> >	

By making this declaration, I understand that I am not allowed to present myself as a candidate to any other bidder submitting a bid to this bid procedure. I am fully aware that if I do so, I will be excluded from this bid procedure, the bidders may be rejected, and I may also be subject to exclusion from other bid procedures and contracts funded by ICA-Africa.

Furthermore, should this bid be successful, I am fully aware that if I am not available at the expected start date of my services for reasons other than ill-health or *force majeure*, I may be subject to exclusion from other tender procedures and contracts funded by ICA-Africa and that the notification of award of contract to the tenderer may be rendered null and void.

Name	
Signature	
Date	

ANNEXURE 3: EVALUATION GRID (To be completed for each Tender by each valuator)

* In the case that interviews are held

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Strengths	
Weaknesses	

Evaluation performed by:

Name	
Signature	
Date	

APPLICATION FOR PREFERENCE POINTS

(The following information must be filled in by the applicant. Failure to submit all the required information may lead to non-awarding of preference points)

1. BUSINESS PARTICULARS

1.1. Name of Business:

1.2. Postal address:

1.3. Physical address:

1.4. Telephone no.:

1.5. Fax no.:

1.6. Cell. no.:

1.7. E-mail address, if available:

1.8. Contact person (Print name):

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1.9. Physical location of Head Office (if applicable):

2. TYPE OF BUSINESS

Tick whichever block is applicable to your business or firm.

PUBLIC COMPANY LTD	
PRIVATE COMPANY (PTY) LTD	
CLOSE CORPORATION CC	
SOLE PROPRIETOR	
PARTNERSHIP	
TRUST	
CO-OPERATIVE	
VOLUNTARY ASSOCIATIONS	
JOINT VENTURE	

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