



TO: Prospective Applicants

DATE: April 29, 2020

SUBJECT: RFA NO. RFA- BSPCLEAR-2020

REQUEST FOR APPLICATION(RFA): PREQUALIFICATION OF BUSINESS SERVICE PROVIDERS FOR CLEAR PROGRAM

REQUEST FOR APPLICATION (RFA)	
RFA NUMBER: RFA No. RFA-GFCLEAR-2020	ISSUE DATE: April 29, 2020
CLIENT: Global Communities	PROGRAM: Cooperatives Leadership Engagement Advocacy and Research (CLEAR)
PREQUALIFICATION OF GENDER FACILITATOR(S)	
ISSUED BY: Global Communities Kyuna Close off Shanzu Lane, Spring Valley PO Box 1661 Sarit Centre Nairobi 00606, Kenya www.globalcommunitieskenya.org	APPLICATION DUE DATE: May 04, 2020 QUESTIONS DEADLINE: May 08, 2020
This Request for Application contains the following sections:	
Part 1	Instructions to Applicants
Part 2	Evaluation Factors
Part 3	Statement of Work
Part 4 Annexes	Annex A – Prequalification application form



Background

Cooperatives Leadership Engagement Advocacy and Research (CLEAR) is a USAID funded program implemented by Global Communities in Kenya. The program aims to:

- i. Promote the adoption and implementation of cooperative legislation and policies that support and strengthen Cooperative Businesses in 25 counties.
- ii. Strengthen the business acumen and performance of start-up Cooperative Businesses while integrating and empowering youth and women within Cooperative Business structures in targeted urban and peri-urban markets to increase economic participation and county revenue growth.
- iii. Improve understanding of the psychosocial behavioral impacts associated with membership in Cooperative Businesses and determine whether those behaviors contribute positively to household and community resilience strategies

In realization of the above, the program is committed to providing technical assistance to at least 15 startup Cooperative Businesses Enterprises in the service and housing sub-sectors. The current cohort of cooperative business enterprises that the CLEAR Program is working with are in the start-up phase of their operations. The cooperatives, therefore, are in need of business advisory services to support growth and expansion. As a result, the CLEAR Program seeks to pre-qualify individual consultants or firms to support in the provision of tailor-made business advisory services that include the development of business and strategic plans and taxation. The Program seeks to pre-qualify a pool of consultants to support the listed areas.

Service needs and prequalification categories

The USAID/CLEAR program shall be providing capacity building to the service/worker-owned and housing cooperatives in a number of technical areas that include: operational management, financial management (auditing, taxation, and financial statements including the cash flow, income and balance sheet), cooperative governance, membership, high impact marketing and service delivery. To achieve this, the Program seeks to pre-qualify individual consultants or business service providers as categorized below:

	Category Code	Category Service Name
1	CL001	Cooperative Business Facilitator
2	CL002	Cooperative Equity and Taxation Facilitator



The purpose of this RFA is to invite qualifying firms/individual consultant(s) desirous to provide any of the above business advisory services to submit their application for prequalification.

Interested firms should submit their applications electronically in accordance with the language of the solicitation to the address specified. The Applications must be received no later than **May 08, 2020**.

Responding firms are advised that this solicitation does not in any way obligate Global Communities to compensate the responding firms/individual consultants for any costs associated with the preparation and submission of their applications.

Any questions or requests for information should be addressed in writing by no later than **May 04, 2020**, to procurementke@globalcommunities.org and cc to keconsultancy@globalcommunities.org

Any information given to one prospective applicant concerning this solicitation will be furnished to all such applicants as an amendment of the solicitation.

Please e-mail Global Communities at procurementke@globalcommunities.org of your intent to propose at the earliest practicable date, so that we may anticipate the number of applications to be evaluated and also to enable Global communities to share with you on any subsequent correspondences regarding this RFA.

This RFA is open to interested applicants who meet the following mandatory requirements:

- a) Registered to do business in Kenya as a private entity or individual.
- b) Registered with Kenya Revenue Authority as individual or business entity.
- c) Minimum of 5 years' relevant experience working with cooperative business enterprises or development of new enterprises and business start-ups.
- d) A Bachelor's degree in any of the following disciplines: - Cooperative management, Entrepreneurship, Commerce, Business Administration and any other relevant qualification from a recognized university for **CL001 applicants**.
- e) Extensive training in Accounting, Taxation and Finance. CPA K or ACCA level certification would be preferred for **CL002 applicants**.
- f) Must not have been debarred from participating in Global Communities Procurements in the past.

Part 1: Instructions to Applicants

- a) Applicants are requested to submit an application for prequalification directly responsive to the terms, conditions, and clauses of this RFA and strictly in



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- accordance to the Prequalification application form (Annex A). Applications not conforming to this format will be categorized as unacceptable and thereby eliminating them from further consideration.
- b) Applications must remain valid for a period at least **12 months** from the date of submission.
 - c) Applications should be submitted electronically - Internet email with up to 2 attachments (2MB limit) per email compatible with PDF,MS WORD, and Adobe Acrobat in a MS Windows environment to: procurementke@globalcommunities.org and cc keconsultancy@globalcommunities.org
 - d) The subject of the application should be: **APPLICATION FOR BUSINESS SERVICE PROVISION-CL001 OR CL002 OR CL001 &CL002**
 - e) All applications received in response to this solicitation will be reviewed strictly as submitted and in accordance with the evaluation criteria specified in Part 2, Evaluation Factors.
 - f) The person signing the application form must have the authority to commit the applicant to all the provisions listed in the application.
 - g) Global Communities is not obligated to pay for any costs incurred by the applicant in preparation of an application in response hereto.
 - h) Applicants are informed that Global Communities complies with U.S. Sanctions and Embargo laws and Regulations including Executive Order 13224 on Terrorist Financing, which effectively prohibit transactions with persons or entities that commit, threaten to commit or support terrorism. Any person or entity that participates in this bidding process, either as a prime or sub to the prime, must certify as part of the bid that he or it is not on the U.S. Department of Treasury Office of Foreign Assets Control (OFAC) Specially Designated Nationals (SDN) List and is eligible to participate. Global Communities shall disqualify any bid received from a person or entity that is found to be on the List or otherwise ineligible.
 - i) Firms or individuals that are included on the Excluded Parties List System (www.epls.gov) shall not be eligible for financing and shall not be used to provide any commodities or services contemplated by this RFA.
 - j) Organizational and Consultant Conflict of Interest – The Bidder confirms that he or she will comply with FAR Part 9.5- Organizational and Consultant Conflict of Interest. The Bidder confirms that he or she is not aware of any information bearing on the existence of any potential organizational and consultant conflict of interest. The Bidder further confirms that if he or she becomes aware of information bearing on whether a potential conflict may exist, that he or she shall immediately provide Global Communities with a disclosure statement describing this information.

Part 2: Evaluation Factors

- a. Only applications that are complete and meet mandatory requirements will be subjected to technical evaluation.
- b. The evaluation factors presented below will serve as the basis upon which Applications will be evaluated. The relative weight accorded to each factor is expressed in points up to 100 points. (60% Technical strength and 40 % Cost competitiveness and reasonableness). The prequalification cut-off mark will be a minimum technical score of 50%.
- c. Global communities will rank bidders based on the technical score and only the most competitive bidders will be further evaluated on their cost proposal. The final prequalification determination will be based on overall score (technical and financial score).
- d. Global Communities will evaluate all applications received based on the above evaluation criteria. This review may include follow-up questions as well as face to face interviews and further negotiation on the cost.
- e. In conducting its evaluation of applications, Global Communities may seek information from any source it deems appropriate to obtain or validate information regarding bidder's application.
- f. Application Evaluation Matrix per service category.

A. Criteria		Maximum Score/Points
Technical Application	Technical understanding	15
	Team Composition and Qualifications	10
	Organizational Specialized competency	15
	Past Experience/Performance/proposed value addition	20
Fee Structure	Cost competitiveness and reasonableness and justifications	40
Total Maximum Score		100

Part 3: Statement of Work

1.0 Background

Cooperatives Leadership Engagement Advocacy and Research (CLEAR) is a USAID funded program implemented by Global Communities in Kenya. The program aims to:

- i. Promote the adoption and implementation of cooperative legislation and policies that support and strengthen Cooperative Businesses in 25 counties.
- ii. Strengthen the business acumen and performance of start-up Cooperative Businesses while integrating and empowering youth and women within Cooperative Business structures in targeted urban and peri-urban markets to increase economic participation and county revenue growth.
- iii. Improve understanding of the psychosocial behavioral impacts associated with membership in Cooperative Businesses and determine whether those behaviors contribute positively to household and community resilience strategies.

The USAID/CLEAR program is committed to providing technical assistance to at least 15 startup Cooperative Businesses Enterprises in the service and housing sub-sectors. The current cohort of cooperative business enterprises that the CLEAR Program is working with cooperatives which are in the start-up phase of their operations. The cooperatives, therefore, are in need of business advisory services to support growth and expansion. As a result, the CLEAR Program seeks to pre-qualify individual consultants or firms to support in the provision of tailor-made business advisory services that include the development of business and strategic plans and taxation. Applicants do not need to be fully versed in the two areas. The Program seeks to pre-qualify a pool of consultants to support the listed areas.

2.0 SERVICE NEEDS AND PREQUALIFICATION CATEGORIES

The USAID/CLEAR program shall be providing capacity building to the service/worker-owned and housing cooperatives in a number of technical areas that include: operational management, financial management (auditing, taxation, and financial statements including the cash flow, income and balance sheet), cooperative governance, membership, high impact marketing and service delivery. To achieve this, the Program seeks to pre-qualify individual consultants or business service providers as categorized below:

3.0 RESPONSIBILITIES AND DELIVERABLES OF THE CONSULTANTS

Service Category Number	Description	Specific responsibilities of the consultants
CL001	Cooperative Business Facilitator	<ol style="list-style-type: none"> 1. The consultant will review the existing business and Strategic plans and provide one-on-one consultation services to each of the cooperatives. 2. The consultant will meet with the cooperatives to review the existing plans and help them to draft more comprehensive business and strategic plans. 3. Provide technical assistance to the respective cooperative board members, management and members to develop and/or refine their business and strategic plans. 4. Deliver the final business and strategic plans to the respective cooperatives. 5. Provide coaching and training facilitation services to ensure sustainability of the cooperatives business model recommended. 6. Co-lead CLEAR program forums for purposes of interacting with cooperatives and providing technical assistance. 7. Provide the service in accordance with the agreed upon Scope of Work. 8. Provide CLEAR program with relevant and accurate after action review (AAR) report and data on the progress. 9. Develop and submit consultancy reports and final deliverables that include, but may not be limited to, the progress reports, training reports, and after action review (AAR) reports.
CL002	Cooperative Equity and Taxation Facilitator	<ol style="list-style-type: none"> 1. Introduce concepts of financial compliance and necessary tax returns and also provide recommendations that reduce/manage tax risks. 2. Train the cooperative management to review and reconcile accounting information to determine their tax obligations. 3. Provide guidance to cooperatives on audits and requests for information from the revenue authorities. 4. Build financial awareness of capital gains, member equity, member reserves, tax calculations and managing capital loss registers. Ensure cooperatives have the skills to calculate or are equipped with the knowledge as to the skills they need and how to procure in the market place. 5. Support in the provision of technical assistance in the area financial management (auditing, taxation, and financial statements including the cash flow, income and balance sheet) for the cooperatives. 6. Build awareness of cooperative tax registration and de registration processes for income tax, VAT and PAYE.



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| | | <ol style="list-style-type: none">7. Co-lead CLEAR program forums for purposes of interacting with cooperatives and providing technical assistance.8. Provide the service in accordance with the agreed upon Scope of Work.9. Develop and submit consultancy reports and final deliverables that include, but may not be limited to, the progress reports, training reports, and after action review (AAR) reports. |
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4.0 RESPONSIBILITIES OF GLOBAL COMMUNITIES

Global Communities shall be responsible for the following:

- a) Provide linkage between the consultant and the targeted cooperative teams.
- b) Where necessary provide technical input through participation in development of training materials as well as review of the reports submitted by the consultants.
- c) Directly pay the contracted fees to the consultants;
- d) Review and approve all deliverables including end of assignment report submitted by the consultants.

5.0 QUALIFICATIONS AND EXPERIENCE

The consultancy/firm is expected to have these qualifications:

1. A Bachelor's degree in any of the following disciplines: - Cooperative management, Entrepreneurship, Commerce, Business Administration and any other relevant qualification from a recognized university. This specifically applies for applicants under CL001.
2. Extensive training in Accounting, Taxation and Finance. CPA K or ACCA level certification would be preferred. This specifically applies for applicants under CL002.
3. Minimum of 5 years' relevant experience working with cooperative business enterprises or development of new enterprises and business start-ups.
4. Experience providing business/operations coaching for Cooperative start-ups and/or SMEs.
5. Extensive experience in leading capacity building activities involving varied audiences. Young adult training experience preferred.
6. In depth and sound knowledge of the co-operatives movement, cooperative performance and sustainability indicators.
7. Excellent communication and ability to work with minimal supervision.
8. Ability to travel to provide technical assistance to cooperatives within and outside of Nairobi County.
9. Ability to virtually communicate with the start-up coops virtually through Skype or Microsoft teams.
10. Previous experience in working with USAID-funded Programs is an added advantage.

-END OF RFA-