To: Prospective Bidders

Issue Date: May 17, 2023

RFP#: FLE/CLEAR/001/2023

REQUEST FOR PROPOSALS (RFP): ENGAGEMENT OF A FACILITATOR FOR CLEAR PROGRAM LEARNING FORUM

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

a) Promote the adoption and implementation of cooperative legislation and policies that support and strengthen CBEs in 25 counties.

b) Strengthen the business acumen and performance of Cooperative Business Enterprises (CBE's) while integrating and empowering youth and women within CBE structures in targeted urban and peri-urban markets to increase economic participation and county revenue growth.

c) Improve understanding of the psychosocial behavioral impacts associated with membership in CBEs and determine whether those behaviors contribute positively to household and community resilience strategies.

CLEAR will be ending in December 2023 and, prior to this, will hold multiple events focused on learning and dissemination. One of these events will be "Learning Forum" that will bring together CLEAR project staff, selected Global Communities US-based staff, and key external stakeholders from cooperatives, the government and USAID to reflect on major project milestones and adaptations and discuss and validate lessons learned. This will be a three-day forum that will be held in Athi River, Machakos County in the month of June from 20th to 22nd 2023.

Interested individuals or firms should submit their proposals electronically in accordance with the language of the solicitation to the address specified. The proposals must be received no later than, May 24, 2023.

Responding bidders are advised that this solicitation does not in any way obligate Global Communities to make a contract award or compensate the responding bidders for any costs associated with the preparation and submission of their proposals. Any questions or requests for information should be addressed in writing by no later than **May 19, 2023,** to procurementke@globalcommunities.org

Any information given to one prospective Offeror concerning this solicitation will be furnished to all such offerors 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 proposals to be evaluated and so that you are also included on any subsequent communications regarding this solicitation.

REQUEST FOR PROPOSAL (RFP)	
RFP NUMBER: RFP No. FLE/CLEAR/001/2023	**ISSUE DATE:** May 17, 2023
CLIENT: **Global Communities**	**PROGRAM:** Cooperatives Leadership Engagement Advocacy and Research (CLEAR)
PRURPOSE: ENGAGEMENT OF A FACILITATOR FOR CLEAR PROGRAM LEARNING FORUM	
ISSUED BY: Global Communities/ Kenya Watermark Business Park, Karen PO Box 1661 Sarit Centre Nairobi 00606 Kenya Tel: +254 781 829 768, +254 769 646 830 www.globalcommunities.org	**PROPOSAL DUE DATE:** May 24, 2023 **QUESTIONS DEADLINE:** May 19, 2023
This Request for Proposal contains the following sections:	
Part 1	Instructions to Offerors
Part 2	Evaluation Factors for Award
Part 3	Statement of Work
Part 4 Annexes	Annex A – Budget Template Annex B – Evidence of Responsibility Annex C- Biographical Data Sheet

Part 1: Instructions to Offerors

I. GENERAL INSTRUCTIONS TO OFFERORS

A. The Offeror is requested to submit a proposal directly responsive to the terms, conditions, and clauses of this RFP. Proposals not conforming to this solicitation will be categorized as unacceptable, thereby eliminating them from further consideration.

B. Proposals must be received no later than, May 24, 2023. Proposals must remain valid for a minimum of sixty (60) days. The Offeror may submit its proposal by the following means:

Electronically - Internet email with up to 2 attachments per email compatible with MS WORD, Excel, and Adobe Acrobat in a MS Windows environment to: procurementke@globalcommunities.org

The overall proposal shall consist of two (2) physically separated parts, as follows: Volume I – Technical Proposal; and Volume II – Cost Proposal. Technical Proposals must not make reference to pricing.

C. Alternative proposals will not be considered.

D. Any proposal 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 for Award.

E. The person signing the Offeror's proposal must have the authority to commit the Offeror to all the provisions of the Offeror's proposal.

F. Global Communities is not obligated to make an award or to pay for any costs incurred by the Offeror in preparation of a proposal in response hereto.

G. The Offeror should submit its best proposal initially as Global Communities intends to evaluate proposals and make an award without discussions. However, Global Communities reserves the right to conduct discussions should Global Communities deem it necessary.

H. Proposals must be clearly and concisely written and must describe and define the Offeror's understanding and compliance with the requirements contained in STATEMENT OF WORK, which can be found in Part 3 of this RFP. The proposal should clearly address each of the evaluation factors set forth in Part 2. All pages of each volume (cost and technical) must be sequentially numbered and identified with the name of the Offeror and the RFP number.

I. Applicants must submit the following documents as a **mandatory requirement:**

1. Copy of company registration certificate or business registration certificate

2. Copy of National ID or Passport for individual applicants.
3. Copy of KRA PIN certificate and valid Tax Compliance Certificate.
4. Copy of professional and academic certificates.

II. SPECIAL RFP CONSIDERATIONS

A. This RFP is open to interested Offerors that have the relevant work experience.

B. The anticipated type of contract to be awarded under this solicitation is fixed price. For the purposes of cost analysis, Offerors must prepare a detailed budget in accordance with Subpart IV below "Instructions for the Preparation of the Cost Proposal."

C. Unnecessarily elaborate brochures or other presentations beyond those sufficient to present a complete and effective response to this solicitation are not desired and may be construed as an indication of the Offeror's lack of cost consciousness. Elaborate artwork and expensive visual and other presentation aids are neither necessary nor desired.

D. Offerors 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/CHF shall disqualify any bid received from a person or entity that is found to be on the List or otherwise ineligible.

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 RFP.

III. INSTRUCTIONS FOR THE PREPARATION OF THE TECHNICAL PROPOSAL

A. The Technical Proposal should provide a straightforward, concise delineation of how the Offeror intends to carry out and satisfy the requirements of the STATEMENT OF WORK found in Part 3 of this RFP. No contractual price information is to be included in the Offeror's technical proposal in order that it will be evaluated strictly on its technical merit.

B. Technical proposals shall be limited to 8 pages in total. Pages in excess of 8 pages will not be read or evaluated. Detailed information should be presented only when required by specific RFP instructions. Items such as graphs, charts, tables may be used as appropriate but will be considered part of the page limitation. **Personnel resume/CV, Madatory attachments like copies of registration certificate and degree certificates are not included in the page limitation**. No material may be incorporated in the proposal by reference, attachment, appendix, etc. to circumvent the page limitation.

C. Technical Proposals shall be written in English, typed on standard A4 paper, single spaced, only 12 font type may be used, with each page numbered consecutively. Page margins shall be a minimum of one inch at the top, bottom and each side.

D. The technical proposal shall include the following elements:

1. Technical Approach

   The Offeror shall demonstrate its understanding, ability, and overall approach to performing the requirements described in the STATEMENT OF WORK, specifically related to facilitation of donor funded project learning forums. Technical Approach should include:

   - Applicants' brief proposal demonstrating their understanding of SOW (one-page maximum).
   - Applicants plans for implementation and proposed methodology and approach (two-page maximum)
   - Applicants proposed timeline of the specific activities to be undertaken using the deliverable timeline included in the SOW (one-page maximum)

2. Applicants Qualification and Experience

   - Bidders shall submit a complete and current resume/CV of proposed facilitation team (**maximum of two**) demonstrating previous work experience in relation to the SOW requirements (not exceeding three (3) pages). The resume must clearly describe the individuals' education, experience, and professional credentials.
   - Bidders shall submit capability statement tailored to SOW requirements (One-page Maximum)

3. Past Performance

   - The Offeror shall submit a list of all current contracts and subcontracts and those completed within the last three (3) years that are similar in size, scope, and complexity to the STATEMENT OF WORK in this RFP. Additionally, for the two most recent similar contracts, the Offeror shall provide the client's name, contract number, contract value, current postal and e-mail addresses, telephone number for a currently available point of contact.
   - At least two reports similar or relevant to SOW requirement.
   - Sample agenda of a similar event

   The list of current and previous contracts/sub-contracts shall be attached as an annex to the Technical Proposal and will not count against the page limit.

IV. INSTRUCTIONS FOR THE PREPARATION OF THE COST PROPOSAL

A. The Offeror must propose costs that it believes are realistic and reasonable for the work in accordance with the Offeror's technical approach. The Offeror shall provide a complete budget in **Kenya Shillings**

by the cost elements described in the SOW (section 4-Schedule of Deliverables and Distribution of the Level of Effort) using ***Annex A - Budget Template***.

B. All cost and financial data should be complete in every detail and organized in a manner that facilitates clear review and permits cost analysis. The cost and financial data shall include the following information/data:

    1. Proposed Level of Effort (LOE) for each deliverable as described in section 4 of the SOW.
    2. Proposed daily rate in Kenya shillings i.e., a day is equivalent to 8 hours.
    3. Applicable taxes
    4. Administration cost e.g., Data and voice cost, transport cost etc. where applicable as required in implementing the consultancy.

C. The Offeror shall submit as part of its Cost Proposal **Annex B** "Evidence of Responsibility", completed, and signed. See Part 4 of this RFP for a list of annexes.

Part 2: Evaluation Factors for Award

I. GENERAL – PROPOSAL EVALUATION

A. Part 1 provides guidance to Offerors concerning the documentation necessary to conduct an informed evaluation of each proposal. The Offeror must furnish adequate and specific information in its proposal. A proposal may be eliminated from further consideration before a detailed evaluation is performed if the proposal is considered obviously deficient as to be totally unacceptable on its face or which prices are inordinately high or unrealistically low. In the event a proposal is rejected, the Offeror will be sent a notice stating the reason(s) that the proposal will not be considered for further evaluation.

B. In conducting its evaluation of proposals, Global Communities may seek information from any source it deems appropriate to obtain or validate information regarding an Offeror's proposal.

C. Competitive Range: If Global Communities determines that discussions are necessary, Global Communities may establish a Competitive Range composed of only the most highly rated proposals. Global Communities may exclude an offer from the competitive range if it is so deficient as to essentially require a new technical proposal. Global Communities may exclude an offer from the competitive range so unreasonably priced, in relation to more competitive offers, as to appear that there will be little or no chance of becoming competitive. Global Communities may exclude an offer from the competitive range requiring extensive discussions, a complete re-write, or major revisions such as to allow an Offeror unfair advantage over those more competitive offers.

D. Global Communities reserves the right to award one or more contracts under this RFP based on initial offers without discussions or without establishing a competitive range.

II. BASIS FOR CONTRACT AWARD

A. The evaluation factors presented below will serve as the basis upon which proposals will be evaluated. The relative weight accorded to each factor is expressed in points with 100 points possible.

	Criteria	**Maximum Score/Points**
Technical proposal	Technical approach	**25**
	Applicants' qualification and experience	**20**
	Organizational capabilities (Capacity and past performance)	**15**
Cost proposal	Cost effectiveness in relations to services to be provided including reasonableness of proposed LOE and daily rates and the Overall cost competitiveness weighed against other technically responsive bids.	**40**
	Total Marks	**100**

Global Communities will evaluate all proposals received based on the above evaluation criteria. The review may include follow-up questions to offerors and/or face to face interviews. Global Communities will enter negotiations with the Offeror that scores the highest number of points using the criteria above.

B. Offerors are reminded that Global Communities is not obliged to award a contract on the basis of lowest proposed cost or highest technical evaluation score. Although for this procurement technical proposal merits are considered more important than cost relative to deciding who might best perform the work, cost factors and Global Communities prime recipient budget must also be considered. Therefore, after the final evaluation of proposals, Global Communities will make the award to the Offeror whose proposal offers the best value to Global Communities, considering both technical and cost factors.

Part 3: Statement of Work (SOW)

1. **Background Information:**

Global Communities seeks a qualified consultant(s) for a short-term, consultancy in Machakos, Kenya. This consultancy will be in support of an international development program funded by the US Agency for International Development, known as the Cooperative Leadership, Engagement, Advocacy and Research (CLEAR) project. The CLEAR program is designed to support the Kenyan cooperative sector through an improved cooperative enabling environment, improved cooperative business performance, and contributions to an evidence base around cooperatives for the broader development sector.

CLEAR will be ending in December 2023 and, prior to this, will hold multiple events focused on learning and dissemination. One of these events will be "Learning Forum" that will bring together CLEAR project staff, selected Global Communities US-based staff, and key external stakeholders from cooperatives, the government and USAID to reflect on major project milestones and adaptations and discuss and validate lessons learned. This will be a three-day forum that will be held in Athi River, Machakos County in the month of June from 19th to 22nd 2023.

2. **Objective**

The objectives of the Forum are as follows:

- Reflect, review, and validate key program milestones, achievements, and their sustainability.
- Share, document, and validate key lessons learned, experiences, and adaptations to inform CLEAR program evaluation.
- Review data and evidence to identify approaches that contributed to program success and sustainability.
- Building on the lessons captured, discuss recommendations and further evidence needed to support the Kenyan cooperatives sector.

Global Communities seeks a consultant(s) to conduct preparatory work, develop an agenda, design sessions, and facilitate the event from June 20-22, 2023. The expected output for this consultancy includes preparation, set-up and facilitation of the event, and post-event debriefs and documentation.

3. **Consultants' responsibilities and deliverables**

    - Meet with CLEAR project representatives to understand the background and objectives of the Learning Forum
    - Engage in a desk review of relevant project documents to gain a clear understanding of the project purpose and documented results and learning. This may include:
        - Annual project reports
        - Key performance metrics
        - Findings from assessments, evaluations, and research
        - Products documenting project activities and lessons learned.
        - Agendas and workshop reports from similar Global Communities' learning events
    - Based on established objectives, develop an agenda for an in-person three-day workshop.

- Design sessions for the forum and develop detailed session guides that explain the methodology that will be taken for each session. The Forum should be designed in such a way that is highly participatory, with a focus on discussion and collaboration. While some presentations might be warranted, most sessions should be designed in such a way to encourage participant reflection, feedback, movement, and interaction.
- Develop a list of materials and other requirements (i.e., equipment, internet, ideal room arrangements) that will be needed for the Forum.
- In collaboration with the CLEAR project team, agree upon physical space needs for the forum in line with session needs (ie. Table formations, materials, etc).
- Serve as the lead facilitator for the 3-day forum, engaging participants and uncovering critical learning.
- Facilitate a de-brief session with CLEAR staff after the forum to hand over materials and provide feedback on the forum.
- Write a report summarizing the major highlights from the forum. This should include descriptions of session methodology, a high-level summary of discussions, and next steps discussed in the event. A template will be provided by Global Communities.

4. Schedule of Deliverables and Level of Effort:

The consultant will be expected to complete the following deliverables:

Task	Deliverables	Estimated LOE in days (A Day is equivalent to 8 hours)	Due Date
Desk Review	Meetings with CLEAR project staff		
Agenda Development and Session Design	(1) Detailed external agenda for Forum participants. (2) Detailed internal agenda for CLEAR project staff with a description of session design/methodology		
Set-up and Facilitation of Learning Forum	Successful facilitation of a two and half day (2.5) event. Daily email summaries highlighting key takeaways for CLEAR event organizers.		
Debrief with CLEAR project staff	Complete debrief with CLEAR project staff on daily basis to inform the activities of the next day.		

Event Report	Report summarizing the structure, methodology, discussions, and outcomes of the Forum.		

5. Global Communities responsibilities

- Mobilize the events participants.
- Participate in the forum and debrief sessions.
- Co-facilitate the forum.
- Provide the relevant documents required for the desk review.
- Review and approve the consultant deliverables including the final report.
- Directly pay for the venue costs for the participants.
- Directly pay the consultant agreed fees net of any applicable income tax.

6. Qualifications:

- A bachelor's degree *or* relevant work experience in a field related to international development or a similar focus.
- At least 3-5 years' experience in facilitation for events with a learning focus and a participatory design.
- Fluency in English; Kiswahili preferred.
- Exceptional communication and interpersonal skills, including experience with facilitation and training delivery, preferably with international participants.
- Excellent writing skills
- Knowledge and experience in USAID's Collaborating, Learning, and Adapting (CLA) framework and methodology.
- Previous experience working in Kenya preferred.
- Ability to work independently with minimal guidance and prioritize tasks.

Part 4: Annexes

Annex A – Budget Template

Annex B – Evidence of Responsibility

Annex C- Biographical Data Sheet