

## **KENVERSTY CO-OPERATIVES SAVINGS AND CREDIT SOCIETY LIMITED**

### **EXPRESSION OF INTEREST FOR FORMULATION OF A STRATEGIC PLAN (2026-2030)**

#### **1.0 BACKGROUND**

Kenversity Co-operative Savings and Credit Society limited hereinafter referred to us “SACCO” is a deposit taking (DT) tier 11 Sacco registered in Kenya since 1976 under the Co-operative Societies Act and licensed by Sacco Societies Regulatory Authority (**SASRA**) under Sacco Act and Regulations 2010. The main core business is to mobilize savings from its members and grant loans at competitive interest rates.

The Sacco draws its members from Kenyatta University, affiliate institutions, individual and groups both salaried and non-salaried. The non-salaried are business owners of Micro, Small and Medium Enterprises. The Society’s statistical audited information as at 31<sup>st</sup> December, 2024 is as follows.

**Table 1-Stastical information**

<b>No.</b>	<b>Details</b>	<b>Total units</b>
1.	Membership	9,498
2.	Assets	4,099,260,579
3.	Deposits	2,847,391,572
4.	loans to members	3,240,750,321
5.	Core capital	776,177,657
6.	Revenue	583,242,676
7.	expenses	448,063,902
8.	Employees	50

The Society strategic plan 2021-2025 is expiring as at 31<sup>st</sup> December, 2025 and the Sacco intends to formulate a strategic plan to guide its operations for the period 2026-2030.

#### **1.1 OBJECTIVES**

The main objective of this consultancy is to develop a new strategic plan for Kenversity Sacco limited that considers current internal and external operating environment to enhance Sacco’s effectiveness and sustainability. The consultant shall guide the sacco clearly in defining the following: -

- a. vision, mission, strategic areas and objectives; including priority focus areas for the strategic period,
- b. situational context, through SWOT, PEST and any other relevant analysis,
- c. sustainability plan which will include proposals for effective financial and human resource strategies

- d. stakeholder map and identify relevant strategies for engaging them to advance the stated objectives,
- e. monitoring and reporting framework to enable effective tracking of the strategic plan
- f. costing of the plan

## **2.0 DELIVERABLES**

**The consultant will deliver on the following; -**

- a. an inception report detailing the methodology/approaches and timelines associated with this consultancy assignment,
- b. a report highlighting the current status and gaps in the sacco strategic direction, covering both internal and external factors relevant to the organizational operating environment,
- c. a report that includes the major activities of the consultants, the highlights of the strategic planning workshop and an evaluation of the workshop,
- d. a revised strategic plan incorporating all the feedback from the stakeholders
- e. a consultancy report that includes the major activities of the consultancy, the highlights of the strategic planning workshop and an evaluation of the workshop,
- f. any other relevant deliverables not included above.

## **3.0 TECHNICAL PROPOSAL**

- I. The consultant should in detail describe the methodology/approaches and timelines associated with this consultancy assignment.
- II. Project work plan should be given with deliverables.
- III. key personnel qualifications including the team leader who should be well conversant with strategic planning, performance management, business continuity planning, performance targeting, risk management as well as monitoring & evaluation.
- IV. The team leader should demonstrate the capability in carrying out the assignment and should include and not limited to education qualification, training experience and experience in development of strategic plans amongst others of which at least 3 years' experience in a relevant field and other personnel experience of at least two (2) years.
- V. Evidence of capability of carrying out the assignment which should be supported with documentations.

## **4.0 FINANCIAL PROPOSAL**

- 1) The consultant will provide clear breakdown of the financial proposal including all the chargeable taxes.
- 2) Terms of payment
- 3) Financial proposal must remain valid for 120 days after the submission date

## **5.0 PROPOSAL EVALUATION**

**Criteria for evaluation description**

**Mandatory requirements**

**Table 2- Mandatory requirement**

<b>NO.</b>	<b>Description</b>	
1.	Company profile	Mandatory
2.	Attached certificates of incorporation	Mandatory
3.	CR12 certificate	Mandatory
4..	Attach current trading license	Mandatory
3.	Attach compliance tax certificate	Mandatory
5.	Minimum three (3) recommendation letters from client for a similar assignment	Mandatory
6.	Attach a letter on the letter head of your company indicating the physical location of the business.	Mandatory
	<b>Marks awarding criteria</b>	<b>Marks</b>
	<b>Relevant Experience</b>	
1.	Number of Strategic Plans developed. Evidence of providing Strategic Consultancy services to three (3) Financial Institutions/Cooperative societies in the last five (5) years (Attach contracts awards /LPO or Letter of award) Cooperative societies and any other financial institutions	8 Marks
2.	Years of experience of the firm: Minimum of 5 years (Score of 1 per year)	5 Marks
3.	Technical proposal detailing mythology, approach and understanding of work.	18 Marks
4.	Project schedule/work plan, allocation of proposed staff and final report outline should be between 12 -16 weeks). Bidders must breakdown each activity and show the deliverables, duration and the personnel (based on expertise) involved in each assignment and/or activity. Deliverable (5 marks), Duration (3 mark), Personnel (2 marks).	8 Marks
	<b>Key Personnel qualifications</b>	
(a)	Team leader qualifications as per terms of reference	6 Marks
(b)	Other staff	5 Marks
6.	Cost =CI/CC *M, Where, CI is Lowest quote received Cc is the Quote of vendor being evaluated M is the total score for cost (50 marks)	50 Marks

**N/B Mandatory documents (failure to attach any required document will lead to disqualification)**

## **HOW TO APPLY**

Download the requirements by clicking on the following link or alternatively visit Kenversity SACCO website: <https://www.kenversitysacco.co.ke>, Interested bidders are expected to write to [info@kenversitysacco.co.ke](mailto:info@kenversitysacco.co.ke) for any clarification. The SACCO will also provide the answers via the same email used by the vendor

## **6.0 CONDITIONS**

1. The SACCO reserves the right to accept or reject any proposal without giving explanations.
2. Any canvassing will lead to automatic cancellation of the submitted proposal.
3. The above exercise will be done in a seminar/workshop for 3 days of the month and venue to be communicated in due time.
4. The consultant will be required to cater for his/her own accommodation and transport during the exercise.
5. Your proposal should be in Kenya shillings and must include any applicable taxes.
6. You should also give details of terms of payments/conditions and any other relevant information.
7. All quotations (both technical and financial) to be sealed, marked “Proposal for Strategic Plan” and dropped in the tender box at our office on or before the close of business of Monday, 12<sup>th</sup> August 2025 addressed to; -

The Chief Executive Officer  
Po Box 10263-00100,  
Tel. 0715-114454,0736-710906  
Email; [info@kenversitysacco.co.ke](mailto:info@kenversitysacco.co.ke)  
Nairobi –Kenya

8. Soft copies will not be considered. Only the successful firm will be awarded this tender and contacted within a month from the date of the closing date.
9. The response document is to be fully and comprehensively completed in all respects.
10. All documents must be submitted in English. The consultant may be asked to clarify answers or provide more details.
11. Kenversity Sacco Society will examine the documents to determine completeness, general orderlies, and sufficiency of response. Failure to complete the questionnaire and/or to provide written answers to any further questions or requested additional information for clarification will result in the supplier’s elimination from further consideration.
12. Please note that by responding to this questionnaire you accept that all answers provided in this questionnaire are LEGALLY BINDING and should a need arise, may be used as evidence in any court of law.
13. Further Kenversity Sacco Society reserves the right without further recourse to verify at its own cost the accuracy of any answers provided therein.
14. Information given by the applicant shall be treated in strict confidence.

15. Applicants to note that this DOES NOT amount to any contractual obligation on the part of Kenversity Sacco Society and the Sacco Society is not obliged to place orders.
16. The costs of preparing the proposal and of negotiating the Contract, including any visit to the Client are not reimbursable as a direct cost of the assignment and the Client is not bound to accept any of the proposals submitted.