



# **PROPOSAL TO ASSESS THE APPROPRIATENESS, AVAILABILITY AND SUSTAINABILITY OF EXISTING INFORMATION, EDUCATION AND COMMUNICATION (IEC) MATERIALS**

## **Consultancy Terms of References**

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### **INTRODUCTION**

NACADA Authority is a State Corporation established through Legal Notice No. 140 of June 2007 to coordinate a public education and awareness campaign against alcohol and drug abuse in Kenya. A key objective is to develop a comprehensive prevention program so as to reduce demand for alcohol and drugs of abuse. Development and distribution of Information, Education and Communication (IEC) materials is an important component of behavior change communication (BCC) efforts in regard to demand reduction. To be effective, however, they must be carefully designed or selected to stimulate behavior change of the target audience with the greatest effectiveness and efficiency.

To achieve this course, the Authority intends to undertake a stakeholder analysis on the appropriateness, availability and sustainability of existing IEC materials.

### **Study objectives**

- To assess the appropriateness of implemented IEC strategies to meet the specific needs of the target audience;
- To assess the availability of IEC materials to the target audience;
- To document sustainability of the strategies used for the development of IEC materials;
- Make recommendations on appropriate approaches to package future campaign information and communication channels best suited to influence each audience.

### **Coverage:**

The study is proposed to cover the Authority stakeholders from the public/private sector and the general public with institutions being the unit of data collection.

### **DETAILS OF ASSIGNMENT**

The Authority seeks to contract a suitably qualified **Consultancy Services** for the survey.

### **Scope of services:**

The Consultancy will lead;

- Proposal Development (Technical/Financial)
- Establishing the Survey design, Target population, Sample size, Sampling Framework and Sampling methods
- Developing of Data Collection instruments
- Mobilization of Respondents and Data Collection
- Data Processing (entry and analysis)
- Presentation of Findings
- Production of Survey Report
- Drafting the Authority ADA Behavior Change Communication (BCC) Strategy.

### **Methodology**

The approach should be participatory both with the NACADA Management, operations team and consultancy to enhance consensus and integration of procedures.

## **Institutional Arrangements**

To coordinate execution of the exercise, the consultancy will liaise with the Authority user sections team

## **QUOTATION REQUIREMENTS**

The bidder shall provide a technical and financial proposal for the assignment as below:

### ***Technical proposal that shall include:***

- a) A brief outline of the proposed technical approach and methodology to carry out the study
- b) A detailed work plan and timeframes on how the assignment will be conducted
- c) Experience of consultant/consultancy firm in conducting assignments of a similar nature including details of similar works undertaken in the last 3 years {attach completion letters/certificates}
- d) Capacity statement of the key personnel – their qualifications and competence in undertaking the study. Such personnel should include the Lead Consultant and any complementary staff indicating their technical and educational backgrounds including past experience in undertaking related assignments. {attach Curriculum Vitae, copies of academic certificates and testimonials}
- e) Statutory obligations where applicable: Note that bids that have not attached copies of valid documents will not be evaluated
  - Copy of PIN registration;
  - Copy Tax Compliance Certificate;
  - Copy of incorporation or registration certificate;
  - Any additional compliance information that may be necessary in execution of the assignment.

### ***Financial proposal that should include:***

- i. The person-days projected for and rate for consultancy fees per person day/daily rate.
- ii. An itemized line by line administrative costs
- iii. Total cost of the project inclusive of VAT
- iv. Terms and schedule of payment.

## **EVALUATION**

The evaluation committee appointed by NACADA Authority shall evaluate the proposals on the basis of their responsiveness to the Terms of Reference.

The technical proposal shall carry 70% of the total mark while the financial evaluation shall carry 30%

### **Criteria Points**

<b>Key headings</b>	<b>Marks</b>
Specific experience of the consultancy firm related to the assignment	30 Marks
Adequacy of the methodology in responding to the terms of reference	30 Marks
Capacity of the proposed Lead Researcher in undertaking the assignment	25 Marks
Adequacy of the work plan and time frame for the assignment	15 Marks
Maximum mark	100

Each responsive proposal will be given a technical score. A proposal shall be rejected at this point if it does not respond to important aspects of the Terms of Reference or if it fails to achieve the minimum technical score of 75 marks.

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

The original proposal (Technical and Financial Proposals) shall be printed in indelible ink and shall contain no interlineations or overwriting. The original Proposal shall be placed in a sealed envelope clearly marked **“TECHNICAL PROPOSAL”**, and the original of the Financial Proposal in

a sealed envelope clearly marked “FINANCIAL PROPOSAL” and warning: “DO NOT OPEN WITH THE TECHNICAL PROPOSAL”.

Both envelopes shall be placed into an outer envelope and sealed. This outer envelope shall bear the submission address and be clearly marked, “DO NOT OPEN, EXCEPT IN THE PRESENCE OF THE OPENING COMMITTEE.” The Financial Proposal envelopes will be sealed in a tamper proof box in the presence of the Opening Committee members.

The completed technical and Financial Proposals must be delivered at the submission address on or before the time and the date stated in the cover letter. Any proposal received after the closing time for submission of proposals shall be returned to the respective Lead Researcher unopened.

After the deadline for submission of proposals, the Technical Proposal shall be opened immediately by the opening committee in one sitting. The Financial Proposal shall remain sealed and deposited with a responsible officer of NACADA Authority up to the time for public opening of financial proposals.

### **Financial Evaluation**

$S_f = 100 \times FM/M$  where  $S_f$  is the financial score;  $F_m$  is the lowest priced financial proposal and  $F$  is the price of the proposal under consideration. Proposals will be ranked according to their combined technical ( $S_t$ ) and ( $S_f$ ) scores using the weights ( $T =$  the weight given to the Technical Proposal;  $P =$  the weight given to the Financial Proposal;  $T + P = 1$ ) indicated in the Appendix. The combined technical and financial score,  $S$ , is calculated as follows: -  $S = S_t \times T\% + S_f \times P\%$ . The Lead Researcher achieving the highest combined technical and financial score will be invited for negotiations.

The information generated as a result of the survey process shall remain the property of NACADA Authority.

**REQUEST FOR PROPOSALS (RFP)  
FOR CONSULTANCY SERVICES TO  
UNDERTAKE A STUDY TO ASSESS  
THE APPROPRIATENESS,  
AVAILABILITY AND  
SUSTAINABILITY OF EXISTING  
INFORMATION, EDUCATION AND  
COMMUNICATION (IEC)  
MATERIALS  
TENDER NO NA/29/11-12**

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## **INFORMATION TO CONSULTANT/CONSULTANCY FIRMS**

### **2.1 Introduction**

- 2.1.1 The NACADA Authority will select a consultant/consultancy firm or consultancy firm among those who submit proposals with the method of selection detailed under this section and consistent with the regulations.
- 2.1.2 The consultant/consultancy firms are invited to submit a technical proposal and a financial proposal for consulting services required for the assignment stated above.
- 2.1.3 The client will provide the inputs and services specified in the special conditions of contract needed to assist the consultant/consultancy firm to carry out the assignment.
- 2.1.4 The cost of preparing the proposal and negotiating the contract including any visit to the procuring entity are not reimbursable as a direct cost of the assignment. The procuring entity is not bound to accept any of the proposals submitted.
- 2.1.5 The procuring entity's employees, committee members, board members and their relative (spouse and children) are not eligible to participate in the tender.

### **2.2 Clarification and amendment to the RFP documents**

- 2.2.1 Individual consultant/consultancy firm may request clarification of any of the RFP documents not later than Seven (7) days before the deadline for the submission of the proposals. Any request for clarification must be sent in writing by post, fax or email to the procuring entity's address indicated as NACADA Authority, Po Box 10774, 00100 Nairobi, Fax No 2721994 or email address - [procurement@nacada.go.ke](mailto:procurement@nacada.go.ke) The procuring entity will respond by post, fax or email to such requests and will send written copies of the response (including an explanation of the query but without identifying the source of inquiry) to all individual consultant/consultancy firms that submit proposals.

- 2.2.2 All Consultants who download the terms and conditions document from the Authority's website must forward their Telephone, and email particulars to the Authority immediately for records and to facilitate forwarding of tender clarifications and addenda the may be issued.
- 2.2.3 At any time before the deadline for submission of the proposals, the procuring entity may for any reason; either at its own initiative or in response to a clarification requested by a consultant/consultancy firm amend the RFP. Any amendment shall be issued in writing, fax or email to all individual consultant/consultancy firms submitting proposals and will be binding on them. The procuring entity may at its discretion extend the deadline for the submission of the proposals.
- 2.2.4 Clarification of tenders shall be requested by the tenderer to be received by the procuring entity not later than 7 days prior to the deadline for submission of tenders.
- 2.2.5 The procuring entity shall reply to clarifications sought by the consultant/consultancy firms within 3 days of receiving the request to enable them make timely submission of its RFP.

### **2.3 Preparation of proposals**

- 2.3.1 The individual consultant/consultancy firm's proposal shall be written in English language.
- 2.3.2 In preparing the Technical proposal, the individual consultant / consultancy firms are expected to examine the documents consisting the RFP in detail. Material deficiencies in providing the information requested may result in rejection of a proposal.
- 2.3.3 While preparing the Technical proposal, the individual consultant/consultancy firm must give particular attention to the following:
- (a) If a consultant/consultancy firm considers that he/she does not have all the expertise required for the assignment he/she may suggest in the proposals other individual(s) who will assist in the assignment.
  - (b) For all the staff who will be involved in the research exercise, consultant/consultancy firm must indicate their responsibility in the assignment and also the staff time as necessary.

- (c) The curriculum vitae (CV) of the staff proposed must be submitted with the proposal.

2.3.4 The Technical proposal shall provide the following information;

- a) Experience of the consultant/consultancy firm in conducting assignments of a similar nature including details of such studies works undertaken in the last 3 years {attach completion certificates}
- b) Capacity statement of the key personnel – their qualifications and competence in undertaking the study. Such personnel should include the Lead Consultant and any complementary staff indicating their technical and educational backgrounds including past experience in undertaking related assignment. {attach Curriculum Vitae, copies of academic certificates and testimonials}
- c) A brief outline of the proposed technical approach and methodology to carry out the study
- d) A detailed work plan and timeframes on how the assignment will be conducted
- e) Statutory obligations: Note that bids that have not have valid documents will not be evaluated
  - Copy of incorporation or registration
  - Copy of operating licence
  - Copy of PIN, VAT registration and valid Tax Compliance Certificate
- f) Any additional information that may be necessary in execution of the assignment.

**2.3.5 The Technical proposal shall be separate from the financial proposal and shall not include any financial information.**

## **2.4 Financial proposal**

2.4.1 In preparing the financial proposal, the consultant/consultancy firms are expected to take into account the time required in completing the assignment. The financial proposal will therefore be quoted in fees required to complete the assignment or further broken into fees per day. The financial proposal may also include other costs as necessary, which will be considered as reimbursable.

**2.4.2 The Financial proposal should include the payable taxes (e.g.VAT , withholding tax etc).**

2.4.3 The fees shall be expressed in Kenya Shillings.

2.4.4 The Financial proposal must remain valid for 90 days after the submission date. During this period the consultant/consultancy firm is expected to keep available at his own cost any staff proposed for the assignment. The procuring entity will make best efforts to complete negotiations within this period. If the procuring entity wishes to extend the validity period of the proposals, the consultant/consultancy firms who do not agree, have the right not to extend the validity of their proposals.

## **2.5 Submission, Receipt and opening of proposals**

2.5.1 The technical proposal and the financial proposal shall be prepared in indelible ink. It shall contain no interlineations or overwriting, except as necessary to correct errors made by the consultant/consultancy firms. Any such corrections must be initialed by the consultant/consultancy firm.

2.5.2 For each proposal the individual consultant/consultancy firms shall prepare the proposals in two copies. Each Technical proposal and Financial proposal shall be marked “ORIGINAL” or “COPY” as appropriate. If there are any discrepancies between the original and the copies of the proposal, the original shall govern.

2.5.3 The original and all copies of the Technical proposal shall be placed in a sealed envelope clearly marked “TECHNICAL PROPOSAL”, while the financial proposal shall be placed in a sealed envelope duly marked “FINANCIAL PROPOSAL”. Both envelopes shall be placed in an outer envelope and sealed. This outer envelope shall bear the procuring entities address and other information and addressed to

TENDER NO NA/29/11-12  
NATIONAL CO-ORDINATOR  
NACADA AUTHORITY  
PO BOX 10774, 00100  
NAIROBI

And clearly marked “DO NOT OPEN before **Thursday 22<sup>nd</sup> December 2011 10.00am**”

2.5.4 The completed Technical and Financial proposals must be delivered at the submission address on or before the time and date of the submission of the proposals indicated in the appendix to the

instructions to consultant/consultancy firms. Any proposals received later than the closing date for submission of proposals shall be rejected and returned to the individual consultant/consultancy firm unopened. For this purpose the inner envelope containing the technical and financial proposals will bear the address of the individual consultant/consultancy firm submitting the proposals.

2.5.5 After the deadline for submission of proposals the outer envelope and the technical proposals shall be opened immediately by the opening committee. The financial proposals shall be marked with the individual consultant/consultancy firms number allocated at the time of opening the outer envelope and the technical proposals but shall remain sealed and in the custody of a responsible officer of the procuring entity up to the time set for opening them.

## **2.6 Evaluation of the Proposal (General)**

2.6.1 From the time the proposals are opened to the time of the contract award, if any consultant/consultancy firm wishes to contact the procuring entity on any matter relating to his/her proposal, he/ she should do so in writing at the address indicated in the appendix to the instructions to consultant/consultancy firms. Any effort by a consultant/consultancy firm to influence the procuring entity's staff in the evaluation of proposals or awards of contract may result in the rejection of the consultant/consultancy firm's proposal.

2.6.2 The proposal evaluation committee shall have no access to the Financial Proposal, which in any case will remain sealed, until the technical evaluation is concluded or finalized.

## **2.7 Evaluation of Technical Proposals**

2.7.1 The evaluation committee appointed by the procuring entity to evaluate the proposals shall carry out the evaluation of technical proposals following the criteria set out in the terms of reference based on the following points criteria

<b>Key headings</b>	<b>Marks</b>
Specific experience of the consultancy firm related to the assignment	30 Marks
Adequacy of the methodology in responding to the terms of reference	30 Marks
Capacity of the proposed Lead Researcher in undertaking the assignment	25 Marks
Adequacy of the work plan and time frame for the assignment	15 Marks
Maximum mark	100

- 2.7.2 Any proposal which will be examined and found not to comply with all the requirements for submission of the proposals will be declared non responsive. All the proposals found to have complied with all the requirements for submission of proposal shall be declared responsive by the evaluation committee
- 2.7.3 Each responsive proposal will be given a technical score (ST). Any technical proposal which fails to achieve the total minimum score indicated in the appendix to the information to tenderers shall be rejected at this stage and will not proceed to the next stage of evaluation. The respective financial proposal will be returned to the individual consultant/consultancy firm unopened.

## **2.8 Opening and Evaluation of Financial Proposals**

- 2.8.1 After completion of the evaluation of Technical proposals the procuring entity shall notify the consultant/consultancy firm's whose proposal did not meet the minimum technical score or were declared non responsive to the RFP. The notification will indicate that their financial proposals shall not be opened and will be returned to them un-opened after the completion of the selection process and contract award. At the same time, the procuring entity shall simultaneously notify the consultant/consultancy firms who have secured the minimum technical score that they have passed the technical qualifications and inform them the date and time set by the procuring entity for opening their financial proposal. They will also be invited to attend the opening ceremony if they wish to do so.
- 2.8.2 The financial proposals shall be opened by the procuring entity in the presence of the individual consultant/consultancy firms who choose to attend the opening. The name of the consultant/consultancy firm, the technical score and the proposed fees shall be read out aloud and recorded. The evaluation committee shall prepare minutes of the opening of the financial proposals.
- 2.8.3 The formulae for determining the financial score (SF) unless an alternative formula is indicated in the appendix to the information to tenderers shall be as follows:

$$Sf = 100 \times fm/f \text{ where}$$

Sf is the financial score  
Fm is the lowest fees quoted and

F is the fees of the proposal under consideration.

The lowest fees quoted will be allocated the maximum score of 100

- 2.8.4 The consultant/consultancy firms proposals will be ranked according to their combined technical score (st) and financial score (sf) using the weights indicated in the appendix to the instructions to consultant/consultancy firms. Unless otherwise stated in the appendix to the instructions to consultant/consultancy firms the formulae for the combined scores shall be as follows;

$$S = ST \times T\% + SF \times P\%$$

Where

S, is the total combined scores of technical and financial scores

St is the technical score

Sf is the financial score

T is the weight given to the technical proposal and

P is the weight given to the financial proposal

Note P + T will be equal to 100%

The individual consultant/consultancy firm achieving the highest combined technical and financial score will be invited for negotiations.

## **2.9 Negotiations**

- 2.9.1 Negotiations will be held at the same address indicated in the appendix to the information to consultant/consultancy firms. The purpose of the negotiations is for the procuring entity and the individual consultant/consultancy firm to reach agreements on all points regarding the assignment and sign a contract.
- 2.9.2 The negotiations will include a discussion on the technical proposals, the proposed methodology and work plan, staff and any suggestions made by the individual consultant/consultancy firm to improve the Terms of reference. The agreed work plan and Terms of reference will be incorporated in the description of the service or assignment and form part of the contract.
- 2.9.3 The negotiations will be concluded with a review of the draft contract. If negotiations fail, the procuring entity will invite the individual

consultant/consultancy firm whose proposal achieved the second highest score to negotiate a contract.

## **2.10 Award of Contract**

2.10.1 The contract will be awarded before commencement of negotiations. After negotiations are completed the procuring entity will promptly notify the other consultant/consultancy firms that they were unsuccessful and return the financial proposals of the individual consultant/consultancy firms who did not pass technical evaluation.

2.10.2 The selected consultant/consultancy firm is expected to commence the assignment on the date agreed with the procuring entity.

## **2.11 Confidentiality**

2.11.1 Information relating to evaluation of proposals and recommendations of contract award shall not be disclosed to the consultant/consultancy firms who submitted the proposal or to other persons not officially concerned with the process, until the winning consultant/consultancy firm has been notified that he/she has been awarded the contract.

## **TECHNICAL PROPOSAL (TP)**

Notes on the Preparation of Technical Proposal

The technical proposal shall be prepared and submitted by the consultants.

It shall contain the following:-

- (a) Submission letter
- (b) Particulars of the consultant and team including Curriculum vitae (CV)
- (c) Academic qualifications of the consultant
- (d) The proposed personnel for the assignment, facilities and any other requirements the consultant requires to be provided by the procuring entity.
- (e) Description of the methodology.
- (f) Work plan for performing the assignment.
- (g) Consultancy services activities time schedule (work plan).

*(To be prepared by the consultant as appropriate)*

## **FINANCIAL PROPOSAL (FP)**

Notes on the Preparation Financial Proposal

The financial proposal shall be prepared and submitted by the consultants. It shall contain the following.

- (a) Submission letter indicating total fees
- (b) Summary of costs
- (c) Breakdown of fees per activity
- (d) Breakdown of reimbursable costs/expenses per activity
- (e) Miscellaneous expenses

*(To be prepared by the consultant as appropriate)*

## **STANDARD FORMS**

The contract form shall be completed by the procuring entity after the award of the contract and negotiation of the contract. It will be signed by both parties pursuant to the information to consultant/consultancy firms' clause 2.10.2

## **STANDARD CONTRACT FORM**

This Agreement, [hereinafter called “the Contract”) is entered into this \_\_\_\_\_  
\_\_\_\_\_ [insert starting date of assignment], by and between.

\_\_\_\_\_ [Insert Client’s name] of [or whose  
registered office is situated at] \_\_\_\_\_ [insert  
Client’s address] (hereinafter called “the Client”) of the one part AND

\_\_\_\_\_ [Insert Consultant/consultancy  
firm’s name] of [or whose registered office is situated at] \_\_\_\_\_  
\_\_\_\_\_ [insert Consultant/consultancy firms address] (hereinafter  
called “the Consultant/consultancy firm”) of the other part.

WHEREAS the Client wishes to have the Consultant/consultancy firm  
perform the services [hereinafter referred to as “the Services”, and

WHEREAS the Consultant/consultancy firm is willing to perform the said  
Services,

NOW THEREFORE THE PARTIES hereby agree as follows:-

1. **Services** (i) The Consultant/consultancy firm shall perform the  
Services

Specified in Appendix A, “Terms of Reference and  
Scope of Service, “which is made an integral part  
Of this Contract.

(ii) The Consultant/consultancy firm shall provide the  
personnel listed

Appendix B, “Consultant/consultancy firm’s  
Personnel,” to perform  
the Services.

(iii) The Consultant/consultancy firm shall submit to  
the Client the

Reports in the form and within the time periods  
Specified in Appendix C, “Consultant/consultancy  
firm’s  
Reporting Obligations.”

*(Appendices A, B, and C to be prepared as appropriate)*

2. **Term** The Consultant/consultancy firm shall perform the Services during the

period commencing on \_\_\_\_\_ [insert starting date] and through to \_\_\_\_\_ [insert completion date], or any other period(s) as may be subsequently agreed by the parties in writing.

3. **Payment** A.

For Services rendered pursuant to Appendix A, the Client shall pay the Consultant/consultancy firm an amount not to Exceed \_\_\_\_\_ [insert amount]. This amount has been established based on the understanding that it includes all the Consultant/consultancy firm's costs and profits as well as any tax obligation that may be imposed on the Consultant/consultancy firm.

B. Schedule of Payments

The schedule of payments is specified below (Modify in order to reflect the output required as described in Appendix C.)

Kshs. \_\_\_\_\_ upon the Client's receipt of the Draft report, acceptable to the Client; and

Kshs. \_\_\_\_\_ upon the Client's receipt of the Final report, acceptable to the Client.

Kshs. \_\_\_\_\_ Total

C. Payment Conditions

Payment shall be made in Kenya Shillings unless otherwise specified not later than thirty (30) days following submission by the Consultant/consultancy firm of invoices in duplicate to the Coordinator designated in Clause 4 here below. If the Client has delayed payments beyond thirty (30) days after the due date hereof, simple interest shall be paid to the Consultant/consultancy firm for each day of delay at a rate three

Percentage points above the prevailing Central Bank of Kenya's average rate for base lending.



and software.

**8. Consultant/consultancy firm Not to be Engaged in certain Activities** The Consultant/consultancy firm agrees that during the term of this Contract and after its termination the Consultant/consultancy firm and any entity affiliated with the Consultant/consultancy firm shall be disqualified from providing goods, works or services (other than the Services and any continuation thereof) for any project resulting from or closely related to the Services.

**9. Insurance** The Consultant/consultancy firm will be responsible for taking out any appropriate insurance coverage.

**10. Assignment** The Consultant/consultancy firm shall not assign this Contract or sub-contract any portion of it without the Client's prior written consent.

**11. Law Governing Contract and Language** The Contract shall be governed by the laws of Kenya and the language of the Contract shall be English language

**12. Dispute Resolution** Any dispute arising out of the Contract which cannot be amicably settled between the parties shall be referred by either party to the arbitration and final decision of a person to be agreed between the parties. Failing agreement to concur in the appointment of an Arbitrator, the Arbitrator shall be appointed by the chairman of the Chartered Institute of Arbitrators, Kenya branch, On the request of the applying party.

For the Client  
firm

For the Consultant/consultancy

Full name \_\_\_\_\_

Full name \_\_\_\_\_

Title \_\_\_\_\_

Title \_\_\_\_\_

Signature \_\_\_\_\_

Date \_\_\_\_\_

Signature \_\_\_\_\_

Date \_\_\_\_\_

**TECHNICAL PROPOSAL SUBMISSION FORM**

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

To: \_\_\_\_\_ [Name and address of Client)

Ladies/Gentlemen:

We, the undersigned, offer to provide the consulting services for \_\_\_\_\_  
[Title of consulting services] 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 sealed under a separate envelope-where applicable].

We understand you are not bound to accept any Proposal that you receive.

We remain,

Yours sincerely,

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

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

:

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

:

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

**FIRM’S REFERENCES**

**Relevant Services Carried Out in the Last Five Years  
That Best Illustrate Qualifications**

Using the format below, provide information on each assignment for which your firm  
either individually, as a corporate entity or in association, was legally contracted.

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



**COMMENTS AND SUGGESTIONS OF CONSULTANT/CONSULTANCY  
FIRMS ON THE TERMS OF REFERENCE AND ON DATA, SERVICES AND  
FACILITIES TO BE PROVIDED BY THE CLIENT.**

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On the data, services and facilities to be provided by the Client:

- 1.
- 2.
- 3.
- 4.
- 5.

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

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**TEAM COMPOSITION AND TASK ASSIGNMENTS**

**1. Technical/Managerial Staff**

Name	Position	Task

**2. Support Staff**

Name	Position	Task

**Proposed Position:** \_\_\_\_\_

**Name of Firm:** \_\_\_\_\_

**Name of Staff:** \_\_\_\_\_

**Profession:** \_\_\_\_\_

**Date of Birth:** \_\_\_\_\_

**Years with Firm:** \_\_\_\_\_ **Nationality:** \_\_\_\_\_

**Membership in Professional Societies:** \_\_\_\_\_

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**Detailed Tasks Assigned:** \_\_\_\_\_

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Key Qualifications:

*[Give an outline of staff member's experience and training most pertinent to tasks on assignment. Describe degree of responsibility held by staff member on relevant previous assignments and give dates and locations].*

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Education:

*[Summarize college/university and other specialized education of staff member, giving names of schools, dates attended and degree[s] obtained.]*

---

Employment Record:

*[Starting with present position, list in reverse order every employment held. List all positions held by staff member since graduation, giving dates, names of employing organizations, titles of positions held, and locations of assignments.]*

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Certification:

**I, the undersigned, certify that these data correctly describe me, my qualifications, and my experience.**

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

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

**Full name of staff member:**

\_\_\_\_\_

**Full name of authorized representative:**

\_\_\_\_\_

**7. TIME SCHEDULE FOR PROFESSIONAL PERSONNEL**

**Months (in the Form of a Bar Chart)**

Name	Position	Reports Due/ Activities	Months (in the Form of a Bar Chart)												Number of months		
			1	2	3	4	5	6	7	8	9	10	11	12			

**Reports Due:** \_\_\_\_\_

**Activities Duration:** \_\_\_\_\_

**Signature:** \_\_\_\_\_  
**(Authorized representative)**

**Full Name:** \_\_\_\_\_

**Title:** \_\_\_\_\_

**Address:** \_\_\_\_\_

(a). Field Investigation and Study Items

*[1<sup>st</sup>, 2<sup>nd</sup>, etc, are months from the start of assignment)*

	1 <sup>st</sup>	2 <sup>nd</sup>	3 <sup>rd</sup>	4 <sup>th</sup>	5 <sup>th</sup>	6 <sup>th</sup>	7 <sup>th</sup>	8 <sup>th</sup>	9 <sup>th</sup>	10 <sup>th</sup>	11 <sup>th</sup>	12 <sup>th</sup>	
Activity (Work)													
_____													
_____													
_____													
_____													

(b). Completion and Submission of Reports

Reports	Date
1. Inception Report	
4. Interim Progress Report (a) First Status Report (b) Second Status Report	
3. Draft Report	
4. Final Report	

**FINANCIAL PROPOSAL**

Notes on preparation of Financial Proposal

- 4.1 The Financial proposal prepared by the consultant/consultancy firm should list the costs associated with the assignment. These costs normally cover remuneration for staff, subsistence, transportation, services and equipment, printing of documents, surveys etc as may be applicable. The costs should be broken done to be clearly understood by the procuring entity.
- 4.2 The financial proposal shall be in Kenya Shillings or any other currency allowed in the request for proposal and shall take into

- account the tax liability and cost of insurances specified in the request for proposal.
- 4.3 The financial proposal should be prepared using the Standard forms provided in this part

### **FINANCIAL PROPOSAL STANDARD FORMS**

Items for the financial proposal

1. The daily rate for the lead consultant and any complementary staff for the period of engagement during the study.
- 2 An itemized line by line administrative costs
- 3 Total project cost inclusive of taxes
- 4 Terms and schedule of payment.

**FINANCIAL PROPOSAL SUBMISSION FORM**

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

**To:** \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
*[Name and address of Client]*

**Ladies/Gentlemen:**

**We, the undersigned, offer to provide the consulting services for ( \_\_\_\_\_ ) *[Title of consulting services]* 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,**

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

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

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

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

**2. SUMMARY OF COSTS**

<b>Activity category</b>	<b>Quantity</b>	<b>Unit description</b>	<b>Cost per unit (Ksh)</b>	<b>No. of units</b>	<b>Total</b>