



**Plan International
Kenya**
Methodist Ministries Centre
Oloitoktok Road
P.O Box 25196-00603
Nairobi - KENYA

Tel: +254 20 2761000 /2447422 /2447433
Mobile: 0722 201293/0734 600774
Email: kenya.co@plan-international.org
www.plan-international.org

TERMS OF REFERENCE

RE-TENDER NO: 21/03/FY24 CONSULTANCY SERVICES FOR STRATEGIC SOURCING OF SUPPLIERS

1.0 Background

Founded in 1937, Plan International, Inc. ("PII") is a globally recognized non-profit organization dedicated to advancing children's rights and gender equality in humanitarian and development contexts. With over 80 years of experience, Plan International addresses the root causes of challenges faced by girls and vulnerable children. Operating in more than 70 countries.

The organization collaborates with children, young people, supporters, and partners to create a more just world, recognizing that the potential of every child is often obstructed by poverty, violence, exclusion, disasters, and discrimination.

Plan International has been active in Kenya since 1982, focusing on long-term development and humanitarian efforts. Working closely with local communities and governments, Plan International Kenya implements programs aimed at improving the well-being of children in areas such as Nairobi, Machakos, Kajiado, Tharaka-Nithi, Siaya, Kwale, Kilifi, Homa Bay, Kisumu, Tana River, Turkana, and Marsabit.

2.0 Objective

Plan International is seeking to engage a firm that has integrity, credibility and fairness. The firm will be responsible for undertaking strategic supplier sourcing by establishing a comprehensive database of potential entities, conducting on-site verifications of their activities, and assessing their capacity to fulfill procurement requests and deliver services in line with Plan International's standards.

The organization aims to streamline its procurement process, by ensuring adherence to market standards, and enhanced supplier selection based on a transparent and comprehensive evaluation.

The primary objective of this consultancy is to engage a reputable firm to:

- a. Establish a comprehensive database of potential vendors within operational areas.
- b. Develop and implement a rigorous prequalification process aligned with Plan International's standards and requirements.



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- c. Conduct due diligence on selected vendors to verify compliance with legal, financial, and ethical standards.
- d. Provide recommendations to enhance vendor selection and procurement efficiency.

Scope of Work:

The consultancy firm will be responsible for the following tasks:

- a. Conducting market research to identify potential vendors within operational areas.
- b. Developing prequalification criteria and questionnaires in consultation with Plan International.
- c. Managing the vendor prequalification process, including bid evaluation and shortlisting.
- d. Conducting on-site visits to assess vendors' capacity and compliance with standards.
- e. Performing due diligence on selected vendors, including financial and legal assessments.
- f. Providing detailed reports and recommendations to inform vendor selection decisions.

3.0 Important Notes to Interested Service Providers

- a) The purpose of this document is to assist Plan International in the identification and evaluation of a potential service provider for Consultancy Services for Supplier Pre-qualification and Due Diligence
- b) Prospective Service Providers must have experience of offering similar services to Organizations comparable to Plan International and/or INGOs and must demonstrate the willingness and commitment to meet the requirements in this RFP.
- c) Firm must own an electronic (E-procurement) vendor selection and appraisal platform capable of handling large data.
- d) Data-base Link must be up 24/7, 360 days in a year and proof of data security and technical support provided.
- e) Firm should be certified or show proof/auditable capacity for data security in line with the Data protection Law.
- f) Firm is able to customize forms and templates for tender per plan international templates and procedures.
- g) Firm must be able to grant access to Plan International auditors to audit the process.
- h) Firm must advertise the prequalification opportunity to a national audience through well circulated national newspaper and accessible platforms.



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- i) Firm shall be responsible for handling communication with vendors including issuing successful and non-successful letters.
- j) Bidders are requested to hold their proposals valid for ninety (90) days from the closing date of the submission. Plan International will make its best efforts to arrive at a decision within this period.
- k) Upon satisfactory completion of the evaluation process, the successful bidder shall be expected to commence the assignment after the contract agreement is signed and a purchase order issued.
- l) Nothing in the Request for Proposal shall be construed to give rise to contractual obligations with Plan International.
- m) Plan International, may at its absolute discretion, suspend or defer this RFP process.

Deliverables:

The consultancy firm will deliver the following:

- a. Prequalification criteria and questionnaire templates.
- b. Comprehensive database of prequalified vendors with detailed profiles.
- c. Reports on vendor assessments, market research findings and due diligence findings.
- d. Recommendations for enhancing procurement processes and vendor selection.

4.0 Terms of Reference

Plan International is seeking qualified service providers with expertise in supplier pre-qualification and due diligence to submit Technical and Financial Proposals for consultancy services within our operational areas, which includes Nyanza region (Kisumu and Homa Bay), Coast Region (Kilifi, Kwale and Tana River) and Central Region (Nairobi, Machakos and Kajiado). The consultancy will include the following services:

a) Pre-qualification of Suppliers:

- Develop and implement a robust supplier selection process aligned with criteria agreed upon with Plan International.
- Manage the bidding process for products and services within the identified categories.
- Evaluate received bids according to agreed criteria and provide a detailed report on the selection outcomes.



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- Provide a market assessment report

b) Due Diligence:

- Perform due diligence on selected suppliers to ensure compliance with legal, financial, and ethical standards.
- Conduct on-site visit to the supplier's premises to ascertain the presence of an office and their capacity to deliver based on the contractual obligation
- Provide Management with recommendations based on the findings of the due diligence process.

5.0 Mandatory Qualifications

The consultancy firm should possess the following qualifications:

1. Registration and Licenses:

- **Registration with the Registrar of Companies:** The Consultant must be registered with the Registrar of Companies and provide evidence for such
- **Valid Tax Compliance Certificate:** Consultants must provide a valid tax compliance certificate issued by the Kenya Revenue Authority (KRA).
- **Professional Credential:** The consultant must possess a valid CIPS/KISM Certification or any other that is relevant to this assignment.

2. Experience and Qualifications:

- **Relevant experience:** Evidence of having completed similar engagement/assignment in an NGO (attach at least three (3) reference letters for projects completed during the past 5 years)
- **Technical expertise:** The bidder is required to showcase expertise in conducting such a consultancy in supplier prequalification and tender management. The bidder is expected to provide case studies and proof of 3 similar assignments executed within the past 5 years. Expertise in procurement best practices, including knowledge of relevant regulations and standards; Capacity to conduct thorough market research and vendor evaluations; Strong analytical and reporting skills; Compliance with regulatory requirements and ethical standards; Proven track record of delivering high-quality consultancy services within agreed timelines.
- **Personnel qualifications:** The project's key personnel must possess pertinent qualifications and experience, potentially including certifications for procurement professionals. The bidder is required to furnish proof of the qualifications and



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competence of essential staff members for the assignment, specifically the Team Leader and Deputy Team Leader. This includes submitting the curriculum vitae (CV) of both the Team Leader and Deputy Team Leader.

Other Requirements:

- **Financial capacity:** Consultants should provide proof of having the financial capacity to carry out the project successfully. This includes bank statements for the last 6 months.
- **Clean track record:** Consultants should have a clean track record of ethical conduct and no history of financial or legal issues.
- **Compliance with procurement regulations:** Consultants must comply with the relevant procurement regulations and procedures set by the procuring entity.

6.0 Global Policy Safeguarding

Plan International is committed to actively safeguarding children and program participants from harm and ensuring children's rights to protection are fully realized. Plan takes seriously the commitment to promote child safe practices and protect children from harm, abuse, neglect and any form of exploitation as they come into contact with Plan International supported interventions. In addition, we will take positive action to prevent child abusers from becoming involved with Plan International in any way and take stringent measures against any Plan International Staff and/or Associate who abuses a child or program participant. Decisions and actions in response to safeguarding concerns will be guided by the principle of 'the best interests of the child.'

7.0 Tender Submission Requirements

Interested bidders should submit a compelling technical proposal and a separate financial proposal which must include below components:

8.1 Technical Proposal

The bidder's understanding of the terms of reference and detailed proposal on how the tenderer will provide the services to Plan International and the modalities of the Consultancy services in relevant categories including, but not limited to:

8.1.1 Introduction and Understanding of Terms of Reference (ToR):

- Clear and concise introduction outlining the consultant's understanding of the ToR.
- Demonstration of comprehension regarding pre-qualification of suppliers, and due diligence processes outlined by Plan International.



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8.1.2 Methodology:

- Detailed explanation of the criteria and methodology, workplan and lead time for pre-qualification of suppliers.
- Clear outline of the due diligence process, including the parameters and checks to be conducted.

8.1.3 Experience and Expertise:

- Comprehensive overview of the consultant's experience in providing procurement consultancy services.
- Description of past projects, highlighting similarities with the current assignment.
- CVs of key staff members assigned to the project, showcasing their qualifications and relevant experience.

8.1.4 Regulatory Compliance:

- Documentation proving registration with relevant regulatory bodies, such as the Public Procurement Regulatory Authority (PPRA) in Kenya.
- Up-to-date membership with professional bodies related to procurement and consulting.

8.1.5 Risk Mitigation:

- Identification of potential risks associated with the procurement outsourcing process.
- Strategies and mechanisms proposed to mitigate and manage these risks effectively.

8.1.6 Supplier Pre-qualification Criteria:

- Transparent presentation of the criteria that will be used for supplier pre-qualification.
- Explanation of how these criteria align with Plan International's objectives and standards.

8.1.7 Due Diligence Process:

- Detailed plan for conducting due diligence on selected suppliers.
- Explanation of the key parameters that will be assessed during the due diligence phase.

8.1.8 Reporting and Communication:

- Outline of the reporting structure, including frequency and format of progress reports.
- Communication plan, demonstrating how the consultant will interact with Plan International throughout the project.

8.2 Financial Proposal

8.2.1 Cost Breakdown:

Provide a clear and detailed breakdown of all costs associated with the consultancy services, distinctly separating costs related to pre-qualification of suppliers, and due diligence processes.



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8.2.2 Fee Structure:

Present the fee structure, clearly indicating whether it is fixed or variable. Include any additional costs or contingencies that might be applicable.

8.2.3 Payment Schedule:

Propose payment milestones linked to project deliverables. Provide a transparent payment schedule that aligns with the progress of the consultancy.

8.2.4 Taxes and Other Charges:

Offer clarity on any applicable taxes and charges, specifying whether they are included in the proposed costs.

8.2.5 Validity of Proposal:

The bidders will be required to hold their proposals valid for 90 days. This includes both technical and financial proposals.

8.2.6 Submission of Bank Statements:

If required, submit the consultant's bank statements for the last three years.

8.3 Evaluation Criteria; Proposals will be evaluated based on:

- a. Demonstrated experience and expertise.
- b. Clarity and feasibility of the proposed methodology.
- c. Alignment with Plan International's objectives and requirements.
- d. Cost-effectiveness of the proposed solution.
- e. Capacity to deliver within the specified timeline.

8.4. Contractual Arrangements:

The selected consultancy firm will enter into a formal contract with Plan International, outlining the terms and conditions of the engagement, including deliverables, timelines, and payment schedules.

8.5. Confidentiality:

All information provided to the consultancy firm during the project must be treated as confidential and not disclosed to third parties without prior consent from Plan International.



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8.6 Completed Bids

The completed proposals, should be emailed to Kenya.bids@plan-international.org, so as to be received on or before **5:00 PM on 10TH May 2024**. Email subject line should read **“Consultancy Services for Strategic Sourcing of Suppliers,”**

Attn: The Tender Committee,
Plan International,
Methodist Ministries Centre,
Block C, Second Floor, Oloitokitok Road, Lavington
P.O. Box 25196 – 00603, Nairobi, Kenya.

PRE-QUALIFICATION CATEGORIES FOR CENTRAL REGION (NAIROBI, MACHAKOS AND KAJIADO).

Specialization
Office Supplies and stationaries
Provision of refreshments (Milk, bread, sodas, juices)
Supply of bottled drinking water (18.9litres, 1.5 litres, 1 litre, 500ml bottled)
Provision of Office cleaning services
Provision of accommodation and conference facilities
Supply of Telephones, Mobile Phones and Telecommunication Equipment, Audio Visual Equipment and Accessories
Supply or Lease of Desktops, Laptops, Printers, Photocopiers, Servers, Scanners, Computer Software, software licenses and all Computer Accessories
Provision of Taxis and Car hire services
Supply of Office Furniture & Equipment
Provision Vehicles and Motorbikes repairs and maintenance services
Supply of Agriculture and Farm Equipment and Supplies
Provision of Maintenance Services – Hardware & software maintenance contracts
Servicing and maintenance of printers



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Supply of Food Supplies (dry cereals, processed foods and other perishable food stuffs)
Provision of Food Inspection services
Provision of Graphic design services for printed and online materials (banners, diaries, brochures, fliers, posters, booklets, e-cards, printed stationery, T-shirts, Caps, woven bags and others)
Provision printing/photocopying services and Supply of Branded items
Provision of Non-Food Items (Water tanks, handwashing equipment, liquid soap, Dignity kits and others)
Provision of Pharmaceutical products (e.g. Aqua tabs, PUR Water purification)
Supply of Seedlings
Provision of Logistics, warehousing, customs clearance, courier services and international freight services.
Electrical supplies and repairs (Air Conditioning units/servers/generators)
Servicing of Fire extinguishers
Provision of Team Building Services
Provision of Fire safety training
Supply of PPEs (Motorbike riding gears, umbrellas, gum boots raincoats,

PRE-QUALIFICATION CATEGORIES FOR NYANZA REGION (KISUMU & HOMABAY)

Specialization
Supply of Stationery and Office Supplies.
Supply of bottled drinking water (18.9litres, 1.5 litres, 1 litre, 500ml bottled).
Provision of refreshments (Milk, bread, sodas, juices).
Provision of Office cleaning services.
Provision of accommodation and conference facilities.
Supply or Lease of Desktops, Laptops, Printers, Photocopiers, Servers, Scanners, Computer Software, software licences and all Computer Accessories.
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Supply of Office Furniture & Equipment.
Provision Vehicles and Motorbikes repairs and maintenance services
Supply of Agriculture and Farm Equipment and supplies e.g. certified seeds, fertilizers etc.
Supply of Fabricated Metal Products
Provision of Maintenance Services – Hardware & software maintenance contracts
Servicing and maintenance of printers
Supply of Food Supplies (dry cereals, processed foods and other perishable food stuffs)
Provision of Food Inspection services
Provision of Graphic design services for printed and online materials (banners, diaries, brochures, fliers, posters, booklets, e-cards, printed stationery, T-shirts, Caps, woven bags and others)
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Provision of Non-Food Items (Water tanks, handwashing equipment, liquid soap, Dignity kits and others)
Provision of Pharmaceutical products (e.g. Aqua tabs, PUR Water purification)
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Provision of Logistics, warehousing, customs clearance, courier services and international freight services.)
Electrical supplies and repairs (Air Conditioning units/servers/generators
Servicing of Fire equipment (extinguishers, smoke detectors, etc)
Provision of Team Building Services
Provision of Fire safety training
Supply of PPEs (Motorbike riding gears, umbrellas, gum boots raincoats,
Fabrication and supply of school furniture.
Supply of school uniform.
Supply and fitting of vehicle tyres and batteries.

PRE-QUALIFICATION CATEGORIES FOR COAST REGION (KILIFI, KWALE AND TANA RIVER).

National Organisations Australia Belgium Canada Colombia Denmark Finland France Germany Hong Kong India Ireland Japan Korea Netherlands Norway Spain Sweden Switzerland United Kingdom United States **Programme Countries** Bangladesh Benin Bolivia Brazil Burkina Faso Cambodia Cameroon China Colombia Dominican Republic Ecuador Egypt El Salvador Ethiopia Ghana Guatemala Guinea Guinea-Bissau Haiti Honduras India Indonesia Kenya Laos Liberia Malawi Mali Mozambique Myanmar Nepal Nicaragua Niger Nigeria Pakistan Paraguay Peru Philippines Rwanda Senegal Sierra Leone Sri Lanka South Sudan Tanzania Thailand Timor-Leste Togo Uganda Vietnam Zambia Zimbabwe

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Supply of Telephones, Mobile Phones and Telecommunication Equipment, Audio Visual Equipment and Accessories
Provision of Taxis and Car hire services
Supply of Office Furniture & Equipment
Provision of Vehicles and Motorbikes repairs and maintenance services
Supply of Agricultural inputs and Farm Equipment and Supplies
Supply of Fabricated Metal Products
Provision of Maintenance Services – Hardware & software maintenance contracts
Servicing and maintenance of printers and provision
Supply of Food Supplies (dry cereals, processed foods and other perishable food stuffs)
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Provision of Fire safety training
Supply of PPEs (Motorbike riding gears, umbrellas, gum boots raincoats,
Supply of Seedlings and certified seeds (Cashew nuts, grafted mangoes, coconut, Mangrove, Seaweed, various trees, cash crops, grains etc)
Supply and installation of Drip Kits, Vegetable production kits,
Supply and fitting of Solar Equipment
Supply of boats
Supply of Energy saving cook stoves
Fabrication and supply of school furniture
Supply and fitting of vehicle tyres and batteries