

**KILIFI COUNTY GOVERNMENT**



**TRADE, TOURISM AND CO-OPERATIVE  
DEVELOPMENT**

**REQUEST FOR PROPOSALS (RFP)**

**CONSULTANCY SERVICES FOR STRATEGIC  
INVESTMENT PORTFOLIO/BANKABLE PROJECTS  
AND ROAD MAP TO ATTRACT DOMESTIC AND  
FOREIGN DIRECT INVESTMENTS IN MINING AND  
HOUSING IN KILIFI.**

**RFP NO. KCG/TRD/840039/2020/2021**

**JANUARY, 2021**

**KILIFI COUNTY GOVERNMENT P.O. BOX 519 – 80108  
KILIFI [kilificountygovt@gmail.com](mailto:kilificountygovt@gmail.com)**

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## **INTRODUCTION**

1. This Standard Request for Proposals (SRFP) has been prepared for use by public entities in Kenya in the procurement of consultancy services and selection of consultants.
2. The SRFP includes Standard form of Contract for Large Assignments and small assignment which are for lump sum or time based payments.
3. A separate SRFP has been provided for selection of individual professional consultants.
4. The General Conditions of Contract should not be modified and instead the Special Conditions of Contract should be used to reflect the unique circumstances of the particular assignment. Similarly, the information to consultants should only be clarified or amended through the Appendix to information to Consultants.
5. This SRFP document shall be used where a shortlist of consultancy firms already exist or has been obtained through a shortlist after an advertisement of Expression of Interest for Consultancy required.

**SECTION I : INVITATION TO TENDER**

**DATE** \_\_\_\_\_

**TENDER REF. NO.** KCG/TRD/840039/2020/2021

**TENDER NAME:** CONSULTANCY SERVICES FOR STRATEGIC INVESTMENT PORTFOLIO/BANKABLE PROJECTS AND ROAD MAP TO ATTRACT DOMESTIC AND FOREIGN DIRECT INVESTMENTS IN MINING AND HOUSING IN KENYA.

**M/S** .....

Dear Sir/Madam,

The county government of Kilifi, department of Trade, Co-operative Development and Tourism invites proposal for the provision of the above-mentioned consultancy services.

A complete set of request for proposal documents may be obtained by interest candidates from the Kilifi County Government official website ([www.kilifi.go.ke](http://www.kilifi.go.ke)) **FREEE OF CHARGE** or from The Public Procurement Information Portal (PPIP).

Completed tender documents should be uploaded in the GOK IFMIS tender portal on or before **26<sup>th</sup> JANUARY 2021 at 10.00am** East African Time.

Prices quoted should be net inclusive of all taxes and delivery must be in Kenya Shillings and shall remain valid for 120 days from the closing date of the tender. Tenders will be opened immediately after the closing time electrical in the GOK IFMIS tender portal

Serialize sequentially each page of the Bid Document including all the attachments. **Avoid manual serialization.**

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**Head of Supply Chain Management  
For: County Secretary and Head of Public Service  
COUNTY GOVERNMENT OF KILIFI**

SECTION II - INFORMATION TO CONSULTANTS

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## **SECTION II-INFORMATION TO CONSULTANTS**

### **2.1 Introduction**

- 2.1.1 The County Government of Kilifi, Department of Trade, Co-operative Development and Tourism will select an individual consultant among those invited to submit proposals or those who respond to the invitation for proposals in accordance with the method of selection detailed under this section and consistent with the regulations.
- 2.1.2 The consultants are invited to submit a technical proposal and a financial proposal for consulting services required for the assignment stated in the letter of invitation (Section I)
- 2.1.3 In the assignment where the procuring entity intends to apply standard conditions of engagement and scales of fees for professional services, which scale of fees will have been approved by a relevant authority, a technical proposal only may be invited and submitted by the consultants. In such a case the highest ranked individual consultant in the technical proposals shall be invited to negotiate a contract on the basis of the set scale of fees. The technical proposals will be the basis for contract negotiations and ultimately for a signed contract with the selected individual consultant.
- 2.1.4 The consultants must familiarize themselves with local conditions as regards the assignment and take them into account in preparing their proposals. To obtain adequate information on the assignment and on the local conditions, consultants are encouraged to liaise with the procuring entity regarding any information that they may require before submitting a proposal.
- 2.1.5 The client will provide the inputs and services specified in the special conditions of contract needed to assist the individual consultant to carry out the assignment.
- 2.1.6 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.
- 2.1.7 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 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 in the special conditions of contract. 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 consultants invited to submit proposals.

- 2.2.2 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 an intended individual consultant amend the RFP. Any amendment shall be issued in writing, fax or email to all invited individual consultants and will be binding on them. The procuring entity may at its discretion extend the deadline for the submission of the proposals.
- 2.2.3 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.
- 2.2.4 The procuring entity shall reply to and clarifications sought by the tenderer within 3 days of receiving the request to enable the tenderer to make timely submission of its tender.

### **2.3 Preparation of proposals**

- 2.3.1 The individual consultant's proposal shall be written in English language.
- 2.3.2 In preparing the Technical proposal, the individual consultants 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 must give particulars attention to the following:
- (a) If an individual consultant 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 but they will not be party to the contract for the purpose of the performance of the assignment. An individual consultant will not propose other individual consultants invited to submit proposals for the assignment. Any individual consultant in contravention of this requirement shall automatically be disqualified.
  - (b) For all the staff who will be involved in the exercise of the proposals to consultant 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) The individual consultants CV and a brief of any recent experience of assignment of a similar nature. For each assignment the brief should indicate the profiles of staff involved, contract amount and the individual consultants' involvement.
  - (b) An expression on the understanding of the terms of reference
  - (c) A financial proposal detailing the costing of the work to be done
  - (d) A description of the methodology and work plan for performing the proposed assignment.
  - (e) Any additional information requested in the special conditions of contract.

2.3.5 The Technical proposal should contain the detailed information as requested above that is a clear understanding of the Term of Reference and the financial proposal of the project.

## 2.4 **Financial Proposal**

2.4.1 In preparing the financial proposal, the individual consultants are expected to take into account the time required in completing the assignment as outlined in the RFP documents. The financial proposal will therefore be quoted in fees per day or month. 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.

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 individual consultant 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 consultants who do not agree, have the right not to extend the validity of their proposals.

2.4.5 The financial proposal must comply with the law governing the profession of the consultant.

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

2.6 completed tender documents should be uploaded in the GOK IFMIS tender portal on or before **26<sup>th</sup> JANUARY 2021 at 10.00 am** East African Time

2.5.1 The technical proposal and the financial proposal (if required) shall be prepared in indelible ink. It shall contain no interlineations or overwriting, except as necessary to correct errors made by the individual consultants. Any such corrections must be initialed by the individual consultant. The Procuring entity will unseal all tender electronically in the GOK IFMIS tender portal on **26<sup>th</sup> JANUARY 2021 at 10.00 am** East African Time. Tenderers are advised not to attend the opening since no physical tender shall be opened before then

## 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 individual consultant 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 consultants. Any effort by an individual consultant to influence the procuring entity's staff in the evaluation of proposals companion proposals or awards of contract may result in the rejection of the individual consultant 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.

**MANDATORY REQUIREMENTS TO BE MET BY THE CONSULTANTS**

Instructions to tenderers (Reference	Particulars of appendix to instructions to tenderers
<p>Evaluation Criteria <b>MANDATORY REQUIREMENTS</b></p>	<p><b>1. Preliminary criteria</b></p> <ul style="list-style-type: none"> <li>i. Copy of certificate of incorporation or business registration.</li> <li>ii. Copy of VAT/PIN certificates from KRA with two obligations</li> <li>iii. Current single business permit not less than two months old from County Government of Kilifi</li> <li>iv. Valid KRA Tax compliance certificate</li> <li>v. Tender should be accompanied by a bid bond of Kshs. 180,000.00 from established approved insurance company/ Bank which must remain valid for 30 days after tendered period of 120 days. Original bi bond shall be enclosed in an envelop and clearly marked with the tender particulars and be deposited in the tender box located at the county treasury before the deadline for submission.</li> <li>vi. Dully filled, signed and stamped confidential business questioner in the format provided.</li> <li>vii. Dully filled, signed and stamped form of tender in the format provided.</li> <li>viii. Digital serialization of the entire complete bid document. (No manual serialization)</li> </ul> <p><b>Evaluation Methodology</b> will be a PASS/FAIL</p> <p><b>NOTE:</b> Bidders <b>MUST</b> meet <b>ALL</b> the above requirements to proceed to technical evaluation.</p>

**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

## **CRITERIA**

### **Technical evaluation**

	<b>TECHNICAL EVALITUATION CRITERIA</b>	<b>OVERALL</b>	<b>CURRENT RATING</b>
<b>1</b>	<b>Qualification and experience of the firm</b> <ul style="list-style-type: none"><li>• The lead consultant should have a master’s degree in business strategy, organizational management (attach certificates and CV)</li><li>• As per item no.7 of the TOR.</li></ul>	<b>20</b>	
<b>2</b>	<b>Implementation methodology and work plan</b> <ul style="list-style-type: none"><li>• Detailed work plan (10mks)</li><li>• Detailed description of the bidders compliance to the detailed requirements (10mks)</li></ul>	<b>20</b>	
<b>3</b>	<b>Should have at least implemented similar work.</b> Relevant project undertaken by the firm. For a similar work, similar magnitude proof for (5) jobs (attach L.S.Os, Award Letters and completion certificates. <ul style="list-style-type: none"><li>• Similar work similar magnitude (20mks)</li><li>• No similar (0MKS)</li></ul>	<b>20</b>	
<b>4</b>	<b>Attach bank statements for the last 12 months</b>	<b>5</b>	
<b>5</b>	<b>Audited books accounts for the last (3) years prepared by a certified public accountant.</b>	<b>15</b>	
	<b>TOTAL SCORE</b>	<b>80</b>	

**Pass mark shall be 60%, those who shall score less than 60% shall not proceed to financial evaluation.**

### **Award Criteria**

The lowest evaluated bidder shall be awarded the tender.

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 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 individual consultants whose proposal did not meet the minimum technical score or were declared non responsive to the RFP and terms of reference. The notification will indicate that their financial proposals shall not be opened and will be returned to them unopened after the completion of the selection process and contract award. At the same time, the procuring entity shall simultaneously notify the consultants 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 IFMIS Tender Portal. All notifications shall be done electronically through the IFMIS Portal

2.8.3 The formula for determining the financial score (SF) unless an alternative formula is indicated in the appendix to the information to tenderers shall be as follows:

$Sf = 100 \times fm/f$  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 individual consultants' 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 consultants. Unless otherwise stated in the appendix to the instructions to consultants the formula 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 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 consultants. The purpose of the negotiations is for the procuring entity and the individual consultant 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 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 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 individual consultants that they were unsuccessful and return the financial proposals of the individual consultants who did not pass technical evaluation.
- 2.10.2 The selected individual consultant is expected to commence the assignment on the date indicated in the appendix to the information to consultants or any other 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 individual consultants who submitted the proposal or to other persons not officially concerned with the process, until the winning individual consultant has been notified that he/she has been awarded the contract.

### **SECTION III - TERMS OF REFERENCE (TOR)**

CONSULTANCY – STRATEGIC INVESTMENT PORTFOLIO/BANKABLE PROJECTS AND ROAD MAP TO ATTRACT DOMESTIC AND FOREIGN DIRECT INVESTMENTS IN MINING AND HOUSING IN KILIFI

<b>S No</b>	<b>Key Focus Areas</b>	<b>Description</b>
1	Nature of Project	Management Consultancy Project
2	Title	Strategic Investment Portfolio and Road Map to attract Domestic and Foreign Direct Investment in Mining and Housing in Kilifi
3	Category	Strategic management consulting
4	Location	County Government of Kilifi
6	Contract Type	Management Consulting Contract
7	Expected Start Date	February 2021
8	Duration	3 Months

#### **CONTENTS**

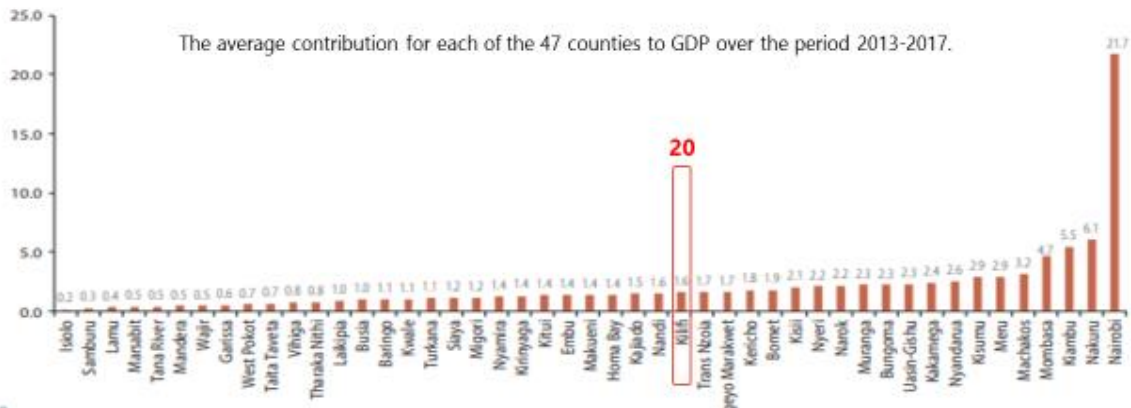
ENCLOSED IN THIS TOR DOCUMENT ARE THE FOLLOWING CONTENTS:

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# 1) INTRODUCTION

The County Government of Kilifi is on a journey towards economic transformation; a harmonized and concerted effort by the County Government of Kilifi, Development Partners and the Business Community to position the county as a competitive destination for Domestic and Foreign Direct Investment (FDI) in line with the county’s vision to be a leading, vibrant, highly productive, secure and prosperous county providing a high quality of life for all its inhabitants.

Based on the data from the Kenya National Bureau of Statistics (KNBS), Gross County Product (GCP) details, the average contribution for Kilifi County to national GDP over the period 2013-2017 is 1.6B and Kilifi is currently ranked at position 20 out of the 47 counties in the Republic of Kenya.



The County Government of Kilifi has prioritized the economic reform agenda, that is expected to double the County’s GDP over the next 5 years and seeks the services of a highly qualified management consultant or consulting firm (herein referred to as “Consultant”) to work closely with County Government staff in the development of a Strategic Investment Portfolio and Road Map of activities to market these opportunities (herein referred to as “the Project”) so as to attract Domestic and FDI into Kilifi County.

This Terms of Reference (TOR) document, also referred to as the Project Charter, defines the purpose and structure of the aforementioned assignment, wherein the Kilifi County Government has agreed to work together with a management consultant or management consulting firm, to accomplish the goals set out in the Objectives and Scope of Work section of this document. This TOR document also describes the Project details, including the scope of the management consultancy services required, a description of the methodology, the detailed phases of the assignment, the key activities across each phase, the corresponding timelines for this set of activities, as well as the key deliverables and outcomes.

This TOR document has been developed to provide a documented approach to decision-making, as well as a framework for developing a common understanding of the scope of the project among stakeholders. This is a step to ensure the successful delivery of the project's outcomes by getting the Project stakeholders to establish a fundamental understanding of the objectives, scope, success factors, constraints, and risks.

## **2. OBJECTIVE AND SCOPE OF THE WORK**

The Integrated National Export Development and Promotion Strategy (INEPDS) – Implementation in the Mining sector has developed value addition strategies geared towards Export Target Delivery in the Country. The County has unexploited mining opportunities with a high growing population with a rich tourism sector that needs high investments in housing in line with the Big 4 Agendas. The County Government of Kilifi is seeking the services of a highly qualified Consultant to work closely with County Government Directorate of Trade and Investment promotion in consultations with the Department of Land, Housing, Energy and Urban Development and the Department Water, Environment & Natural Resources in the development of a Strategic Investment Portfolio and Road Map of activities to attract FDI and DDI in County in Real estate and mining.

The Consultant is expected to originate, develop, package, and help in the marketing of FDI projects in in Housing and Mining Sectors. This assignment also includes the enhancement and re-packaging of the FDI opportunities identified in the Kilifi Investment Guide 2019 in the sectors above.

Once the FDI opportunities have been developed and packaged, the Consultant is to work closely with the County to develop the corresponding Road Map of activities and investment proses and stages that is aligned with the Kilifi County Investment Promotion Strategy 2019. The Consultant is also required to provide a clear process and structure that potential in investors interested in the sectors has to do to obtain necessary permits and licences for investment. These activities will facilitate the effective marketing of the FDI opportunities in Kilifi County and will position the FDI projects within the purview of the right audiences so as to secure inward Foreign Direct Investment (FDI).

This Strategic Investment Portfolio should also take into account Kenya Vision 2030 and should demonstrate how it will accelerate Kilifi County development, create jobs, bring new technologies to Kilifi, open market access, contribute to Kilifi County Project Plan as well as deliver positive impact on Kilifi's GDP in 2019 – 2020 and beyond.

## **3. OUTPUTS/EXPECTED DELIVERABLES**

To help facilitate the successful delivery of this assignment, below is a high-level overview of the Project Methodology and related activities along with proposed timelines, outputs and deliverables for each activity.

### 3.1) Project Methodology:

The Consultant is expected to work closely with the County Government of Kilifi to realize the Project objectives detailed in this document using the 4-phase methodology below, which has been adopted to optimize the delivery of the Project's outputs:



### 3.2) Key Tasks and Deliverables:

#### Phase 1: Data Review and Analysis

Data review and Analysis for the Sectors

- 1) Mining
- 2) Housing

Assessment and Review of the following:

- Factors of production, inputs, rewards and incentives
- Project GDP Impact
- Economic Impact
- Project Priority



### *Key Deliverables / Outcomes*

- Well-branded sector-specific profiles and corresponding marketing collateral
- A report containing at least three (3) bankable projects for FDI in each Sector. This report should include a high-level assessment of the factors of production across each project, its contribution to the GDP and its corresponding economic impact
- A profile map of mining opportunities in the county.

## **Phase 2: Strategic Investment Portfolio and Road Map of Promotion Activities**

This phase involves the development of Strategic Investment Portfolio of the bankable projects across the Sectors

The Consultant is expected to work closely with the county to deliver a Road Map of activities to market the portfolio of bankable projects based on a priority to be jointly established with the County Government of Kilifi as per the schedule below:

- Quick Wins (0-12 months turn-around time)
- Medium Term (12-24 months turn-around time)
- Long Term (over 25 months turn-around time)

### *Key Deliverables / Outcomes*

- A detailed report on the most bankable FDI projects
- A detailed Road Map of investment promotion activities based on the order of priority jointly established with the County Government of Kilifi

## **Phase 3: Feasibility Analysis and Financial Pack Development**

To complement the promotional effectiveness of the sector profiles and the Investment Portfolio, we need to generate a set of structured high-level feasibility studies to help demonstrate the viability of the proposed FDI projects in the Priority Sectors

This exercise involves the development of a set of reports highlighting the technical feasibility and financial viability of the FDI projects in the portfolio. These reports will form part of the information packs that investors will receive as the stakeholders undertake investment promotion activities.

### *Key Deliverables / Outcomes*

- A set of high-level feasibility studies demonstrating the technical feasibility and financial viability of the FDI projects in the Strategic Investment Portfolio

#### **Phase 4: Implementation**

The first task in this phase of the Project involves the production of visually appealing material that will be used to solicit investor interest and effectively promote the FDI projects in Kilifi County. Some of the promotional material includes the online content (photos, info graphics, presentation slides, and videos) as well as the offline content (booklets, posters, fliers and brochures)

The second task in this phase of the Project is the development of a timetable of investor-targeted promotional activities (local, regional and international) and includes, but is not limited to, Roadshows, Investment Forums and Conferences.

The County Government of Kilifi will absorb any associated costs that arise from offline content material (booklets, posters, fliers and brochures). The consultant will also offer a technical and advisory services (including content generation) in organizing any roadshow events, investment forum and conferences; with the County Government of Kilifi committing to meet all costs associated with these events.

The third task is to provide technical assistance on investment options and report to the Project stakeholders in structuring and facilitating FDI projects using various models and instruments such as:

- **PPP - Public Private Partnership** is a cooperative arrangement between two or more public and private sectors, typically of a long-term nature. PPP projects are primarily used for infrastructure provision, such as the building and equipping of schools, hospitals, transport systems, water and sewerage systems etc. Usually in PPP financing models, the public return on investment is lower than returns for the private funder. Common themes of PPPs are the sharing of risk and the development of innovation.

PPP projects identified in this project should be structured in line with the guidelines provided by the PPP Unit National treasury.

- **Joint Ventures (JVs) with Investors** is a financing instrument which is used in developing economies wherein a public or private entity enters into a Joint venture with a private group of investors to raise finance and fund projects across key sectors like healthcare, education, housing etc. and share returns
- **Equity / Debt or Hybrid Investments - Equity financing** is the process of raising capital through the sale of shares. Companies or Governments raise money because they might have a short-term need to pay bills or they might have a long-term goal and require funds to invest in their growth. By selling shares, they sell ownership in their company or the Government project in return for cash. **Debt financing** involves borrowing a fixed sum from a lender, which is then paid back with interest. Equity financing is the sale of a percentage of the business to an investor, in exchange for capital. **Hybrid financial instrument** is an instrument that partakes some characteristics of debt and others of equity. Hybrid instruments contain embedded equity component as well as debt component. Hybrid instruments lure foreign investments or private equity firms in several niche areas, especially in the start-up space and innovative government financing models

- **Green Bonds** - are designated bonds intended to encourage sustainability and to support climate-related or other types of special environmental projects -more specifically, green bonds finance projects aimed at energy efficiency, pollution prevention, sustainable agriculture, fishery and forestry, the protection of aquatic and terrestrial ecosystems, clean transportation, sustainable water management and the cultivation of environmentally friendly technologies. Green bonds come with tax incentives such as tax exemption and tax credits, making them a more attractive investment compared to a comparable taxable bond
- **Micro financing** - also called microcredit, is a type of financing and banking service provided to unemployed or low-income individuals or groups who otherwise would have no other access to financial services. While institutions participating in the area of microfinance most often provide lending—microloans can range from as small as \$100 to as large as \$25,000—many financial institutes and banks offer additional services such as checking and savings accounts and micro-insurance products, and some even provide financial and business education. The goal of microfinance is to ultimately give impoverished people an opportunity to become self-sufficient.

*Key Deliverables / Outcomes*

- A set of visually appealing and promotionally effective online and offline collateral showcasing FDI projects in Kilifi County. This includes photos, infographics, presentation slides, and videos as well as the designs for booklets, posters, fliers and brochures.
- A timetable and resource plan for a set of investor-targeted activities together with a supporting monitoring and evaluation framework that will help Project stakeholders evaluate the effectiveness of each activity when it comes to soliciting investor interest and track investor engagement from the point of initial contact to the point the investment is secured.

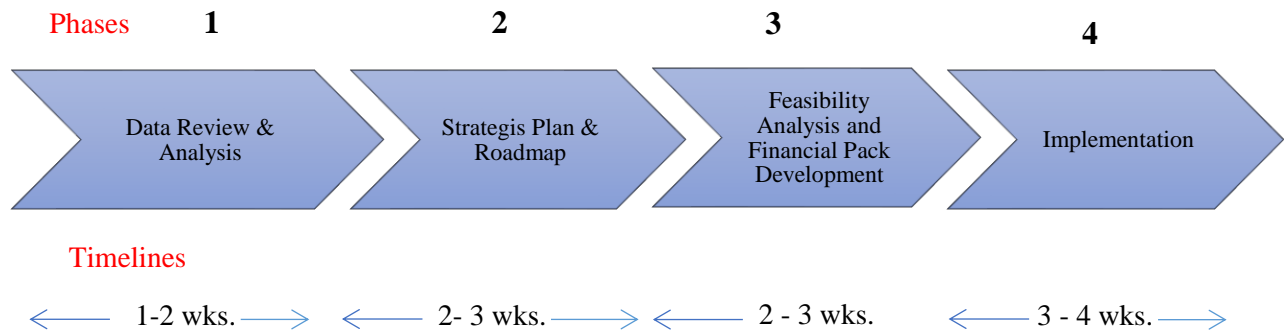
#### 4. DURATION OF THE CONTRACT

The duration of the project based on the details has been outlined as below (in weeks) which has been earmarked to each phase.

Please note that the project duration and timelines are not final and could be subject to change based on unforeseen Project risks and factors such as availability of data, access to related information and the development of investment rational etc.

Phases 1 to 3 are strategic planning and financial analysis phases which are expected to take no more than six (6) weeks. This could be termed as the fixed duration of the management consultancy project.

Phase 4 is the implementation phase for the Project, which is expected to take no more than six (6) weeks.



#### 5. CONTRACTING ARRANGEMENT AND APPLICATION PROCEDURE

As per the County Government of Kilifi terms, conditions and procurement policies

## 6. DUTY STATION AND PROJECT MANAGEMENT

This assignment is both field and home-based.

While based in Kilifi, the County Government of Kilifi will provide an office space and an Internet connection for the successfully contracted Consultant and will cater for the transport and accommodation expenses if the Consultant have to travel outside the county. County Government of Kilifi will also facilitate different meetings necessary like validation workshop etc.

*6.1) Primary Contact for Decision Making:* County Government of Kilifi will assign a designated member of staff to serve as the Primary Contact for this Project. This Primary Contact will interface with County staff and Project stakeholders to minimize County-related Project delays and ensure the successful co-ordination of the Project outputs and deliverables. They will have the requisite knowledge, experience and ability to make decisions in relation to the management consultancy services and the consultant's recommendations.

*6.2) Project Manager for Project Delivery:* County Government of Kilifi will also appoint a Project Manager who will be responsible for the day-to-day administrative and operational matters. This includes scheduling all meetings, making transport arrangements and providing all data and information when requested.

These individuals will be assigned for the sole purpose of providing the Consultant with the support and information enable and facilitate the delivery of the set Project objectives.

### **Engagement Management:**

- In collaboration with the Point of Contact and the Consultant represent and direct the engagement for and on behalf of the County Government of Kilifi. The Consultant is expected to demonstrate experience and maintain the highest levels of professionalism in the execution of their duties. The Consultant should have at least 20 years of experience working with the Governments and/or a reputable management consulting firm.
- The Consultant will be a single point of contact and will provide a project plan and a monthly reporting schedule highlighting the Project outputs and deliverables.
- The Consultant is expected meet the County Government of Kilifi at regular intervals to update the County on the progress of the Project, address any challenges encountered in the implementation of the Project and align with the County on some of the key decisions next steps in the engagement.

## 7. REQUIRED EXPERTISE AND QUALIFICATION

*Education qualification of the Lead consultants:*

- Master Degree or other advanced university degree (at least MBA or equivalent) in the

area of business, strategy, organizational management, institutional/organizational development, or any other relevant domain with active experience on business review in Real estate(housing) or Mining.

*Education qualification of the Junior consultants (2):*

- Bachelor's university degree (at least BA or B Com. or equivalent) in the area of organizational management, institutional/organizational development, social sciences or any other relevant domain.

*Experience of the Lead Consultant:*

- At least 5 years of professional experience in conducting business review in Real estate and Mining
- Demonstrated experience in capacity development of strategic initiatives
- Extensive conceptual and practical knowledge of local government operating and strategic principles;
- Experience of working and collaborating with stakeholders including governments; Civil society and communities
- Demonstrated ability of analytical and report drafting work;

*Experience of the Junior Consultants:*

- At least 3 years of professional experience in conducting business reviews in Real estate (Housing) and mining Respectively.
- Demonstrated experience in strategy development initiatives
- Extensive conceptual and practical knowledge of local government operating and strategic principles;
- Demonstrated ability of analytical and report drafting work;

*Language requirement:*

- Excellent written and verbal communication skills in English;
- Working knowledge of MS Office tools.

## **SECTION IV - 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 including Curriculum vitae (CV)
- (c) Comments and suggestions of the consultant on the terms of reference, personnel, facility and other requirements to be provided by the procuring entity.
- (d) Description of the methodology and work plan for performing the assignment
- (e) Any proposed staff to assist in the assignment
- (f) Consultancy services activities times' schedule.  
*(to be prepared by the consultant as appropriate)*

**1. 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 and contacts of Client: assignment.	Clients contact person for the
Address:	No of Staff-Months; Duration of Assignment:
Start Date (Month/Year):	Completion Date (Month/Year):
Approx. Value of Services (Kshs)	
Name of Associated Consultants. If any:	No of Months of Professional Staff provided by Associated
Consultants:	
Name of Senior Staff (Project Director/Coordinator, Team Leader) Involved and Functions Performed:	
Narrative Description of project:	
Description of Actual Services Provided by Your Staff:	

Firm's Name: \_\_\_\_\_

Name and title of signatory; \_\_\_\_\_

*(May be amended as necessary)*

## **2. TEAM COMPOSITION AND TASK ASSIGNMENTS**

### **1. Technical/Managerial Staff**

<b>Name</b>	<b>Position</b>	<b>Contact</b>	<b>Task</b>

### **2. Support Staff**

<b>Name</b>	<b>Position</b>	<b>Contact</b>	<b>Task</b>



**3. 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:** \_\_\_\_\_

#### 4. ACTIVITY (WORK) SCHEDULE

(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>	
<b>Activity (Work)</b>													
_____													
_____													
_____													
_____													

(b). Completion and Submission of Reports

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

## **SECTION V- 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)*

**SECTION VI- STANDARD CONTRACT FORM**

**1. STANDARD CONTRACT FORM**

**INDIVIDUAL PROFESSIONAL CONSULTANTS**

**(Lump-sum payments)**

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

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

WHEREAS the Consultant is willing to perform the said Services,

NOW THEREFORE THE PARTIES hereby agree as follows:-

1. **Services**
  - (i) The Consultant 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 shall provide the personnel listed Appendix B, “Consultant’s Personnel,” to perform The Services.
  - (iii) The Consultant shall submit to the Client the Reports in the form and within the time periods Specified in Appendix C, “Consultant’s Reporting Obligations.”

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

2. **Term** The Consultant 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. **Ceiling**  
For Services rendered pursuant to Appendix A, the Client shall pay the Consultant an amount not to Exceed \_\_\_\_\_ [insert amount]. This amount Has been established based on the understanding That it includes all the Consultant's costs and Profits as well as any tax obligation that may be Imposed on the Consultant.
- 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 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 for each day of delay at a rate three Percentage points above the prevailing Central Bank of Kenya's average rate for base lending.
4. **Project Administration**
- A. **Coordinator**  
The Client designates \_\_\_\_\_ [Insert name] as Client's Coordinator; the Coordinator will be responsible for the Coordination of activities under this Contract, For acceptance and approval of the reports and of

Other deliverables, by the Client and for receiving  
And approving invoices for payment.

B. Reports

The reports listed in Appendix C, "Consultant's Reporting Obligations," shall be submitted in the Course of the assignment and will constitute the Basis for the payments to be made under paragraph 3.

5. **Performance Standards** The Consultant undertakes to perform the Services with the highest standards of professional and Ethical competence and integrity. The Consultant Shall promptly replace any employees assigned Under this Contract that the Client considers Unsatisfactory.
6. **Confidentiality** The Consultant shall not, during the term of this Contract and within two years after its expiration Disclose any proprietary or confidential Information relating to the Services, this Contract Or the Client's business or operations without the Prior written consent of the Client.
7. **Ownership of Material** Any studies, reports or other material, graphic, software or otherwise prepared by the Consultant For the Client under the Contract shall belong to And remain the property of the Client. The Consultant may retain a copy of such documents And software.
8. **Consultant Not to be Engaged in certain Activities** the Consultant agrees that during the term of this Contract and after its termination the Consultant and any entity affiliated with the Consultant 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 will be responsible for taking out Any appropriate insurance coverage.
10. **Assignment** The Consultant shall not assign this Contract or Sub-contract any portion of it without the Client's Prior written consent.
11. **Law Governing** The Contract shall be governed by the laws of

**Contract and Language** 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

for the Consultant

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

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

Title \_\_\_\_\_

Title \_\_\_\_\_

Signature \_\_\_\_\_

Signature \_\_\_\_\_

Date \_\_\_\_\_

Date \_\_\_\_\_

**LETTER OF NOTIFICATION OF AWARD**

Address of Procuring Entity

\_\_\_\_\_  
\_\_\_\_\_

To: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

RE: Tender No. \_\_\_\_\_

Tender Name \_\_\_\_\_

This is to notify that the contract/s stated below under the above mentioned tender have been awarded to you.

\_\_\_\_\_  
\_\_\_\_\_

1. Please acknowledge receipt of this letter of notification signifying your acceptance.
2. The contract/contracts shall be signed by the parties within 30 days of the date of this letter but not earlier than 14 days from the date of the letter.
3. You may contact the officer(s) whose particulars appear below on the subject matter of this letter of notification of award.

*(FULL PARTICULARS)* \_\_\_\_\_  
\_\_\_\_\_

SIGNED FOR ACCOUNTING OFFICER



2.

**REQUEST FOR REVIEW FORM**

**FORM RB 1**

**REPUBLIC OF KENYA**

**PUBLIC PROCUREMENT ADMINISTRATIVE REVIEW BOARD**

APPLICATION NO.....OF.....20.....

BETWEEN

.....APPLICANT

AND

.....RESPONDENT (*Kilifi County Government Department of Lands, Energy, Housing Physical Planning, and Urban Development*)

Request for review of the decision of the..... (*Kilifi County Government Department of Lands, Energy, Physical Planning, Housing and Urban Development*) of .....dated the...day of .....20.....in the matter of Tender No.....of .....20...

**REQUEST FOR REVIEW**

I/We.....,the above named Applicant(s), of address: Physical address.....Fax No.....Tel. No.....Email ....., hereby request the Public Procurement Administrative Review Board to review the whole/part of the above mentioned decision on the following grounds , namely:-

- 1.
- 2.

By this memorandum, the Applicant requests the Board for an order/orders that: -

- 1.
- 2.

SIGNED .....(Applicant)

Dated on.....day of ...../...20...

---

**FOR OFFICIAL USE ONLY**

Lodged with the Secretary Public Procurement Administrative Review Board on ..... day of .....20.....

SIGNED, Board Secretary

8.2 **CONFIDENTIAL BUSINESS QUESTIONNAIRE FORM**

You are requested to give the particulars indicated in Part 1 and either Part 2(a), 2(b) or 2 (c) whichever applied to your type of business  
 You are advised that it is a serious offence to give false information on this form

	Part 2 (a) – Sole Proprietor Your name in full ..... Age ..... Nationality ..... Country of origin ..... • Citizenship details .....																												
	Part 2 (b) Partnership Given details of partners as follows: <table style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 15%;"></th> <th style="width: 45%;">Name</th> <th style="width: 20%;">Nationality</th> <th style="width: 20%;">Citizenship Details</th> </tr> </thead> <tbody> <tr> <td>Shares</td> <td></td> <td></td> <td></td> </tr> <tr> <td>1.</td> <td>.....</td> <td>.....</td> <td>.....</td> </tr> <tr> <td>2.</td> <td>.....</td> <td>.....</td> <td>.....</td> </tr> <tr> <td>3.</td> <td>.....</td> <td>.....</td> <td>.....</td> </tr> <tr> <td>4.</td> <td>.....</td> <td>.....</td> <td>.....</td> </tr> </tbody> </table>		Name	Nationality	Citizenship Details	Shares				1.	.....	.....	.....	2.	.....	.....	.....	3.	.....	.....	.....	4.	.....	.....	.....				
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	Part 2 (c) – Registered Company Private or Public ..... State the nominal and issued capital of company- Nominal Kshs. .... Issued Kshs. .... Given details of all directors as follows <table style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 15%;"></th> <th style="width: 45%;">Name</th> <th style="width: 20%;">Nationality</th> <th style="width: 20%;">Citizenship Details</th> </tr> </thead> <tbody> <tr> <td>Shares</td> <td></td> <td></td> <td></td> </tr> <tr> <td>1.</td> <td>.....</td> <td>.....</td> <td>.....</td> </tr> <tr> <td>2.</td> <td>.....</td> <td>.....</td> <td>.....</td> </tr> <tr> <td>3.</td> <td>.....</td> <td>.....</td> <td>.....</td> </tr> <tr> <td>4.</td> <td>.....</td> <td>.....</td> <td>.....</td> </tr> <tr> <td>5.</td> <td>.....</td> <td>.....</td> <td>.....</td> </tr> </tbody> </table>		Name	Nationality	Citizenship Details	Shares				1.	.....	.....	.....	2.	.....	.....	.....	3.	.....	.....	.....	4.	.....	.....	.....	5.	.....	.....	.....
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5.	.....	.....	.....																										
Date ..... Signature of Candidate .....																													

If a Kenya Citizen, indicate under “Citizenship Details” whether by Birth, Naturalization or registration.

**FORM OF TENDER**

Date \_\_\_\_\_  
Tender No. \_\_\_\_\_

To: \_\_\_\_\_

*[name and address of procuring entity]*

Gentlemen and/or Ladies:

1. Having examined the tender documents including Addenda Nos. .... *[insert numbers]*.the receipt of which is hereby duly acknowledged, we, the undersigned, offer to supply deliver, install and commission ( ..... *(Insert equipment description)* in conformity with the said tender documents for the sum of ..... *(total tender amount in words and figures)* or such other sums as may be ascertained in accordance with the Schedule of Prices attached herewith and made part of this Tender.

2. We undertake, if our Tender is accepted, to deliver install and commission the equipment in accordance with the delivery schedule specified in the Schedule of Requirements.

3. If our Tender is accepted, we will obtain the guarantee of a bank in a sum of equivalent to \_\_\_\_\_ percent of the Contract Price for the due performance of the Contract , in the form prescribed by ..... *( Procuring entity)*.

4. We agree to abide by this Tender for a period of ..... *[number]* days from the date fixed for tender opening of the Instructions to tenderers, and it shall remain binding upon us and may be accepted at any time before the expiration of that period.

5. This Tender, together with your written acceptance thereof and your notification of award, shall constitute a Contract, between us. Subject to signing of the Contract by the parties.

6. We understand that you are not bound to accept the lowest or any tender you may receive.

Dated this \_\_\_\_\_ day of \_\_\_\_\_ 20 \_\_\_\_\_

\_\_\_\_\_  
[signature]

\_\_\_\_\_  
[in the capacity of]

Duly authorized to sign tender for an on behalf of \_\_\_\_\_