



World Council

# Consultant Solicitation

Virtual Training Consultant (Kenya)

Published by: World Councils of Credit Unions (WOCCU)  
Technology and Innovation for Financial Inclusion

## **Consultant Solicitation**

**World Council of Credit Unions, Inc. (WOCCU)**

**Technology and Innovation for Financial Inclusion (TIFI)**

**Solicitation Number: TIFI-K-2020-001**

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**Deadline to Submit Questions:** November 2, 2020; no later than 5:00 pm EST

**Submit Questions to:** Conor Farrell; [cfarrell@woccu.org](mailto:cfarrell@woccu.org)

**Deadline to Submit Proposals:** November 9, 2020; no later than 5:00 pm EST

**Submit Proposals to:** [tifiopportunities@woccu.org](mailto:tifiopportunities@woccu.org)

**Subject:** Virtual Training Consultancy Support – Kenya

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## I. BACKGROUND

Founded in 1971, the World Council of Credit Unions' (WOCCU) is the apex credit union trade association and an international development implementer focused on supporting financial institutions to reach underserved markets. WOCCU is the world's leading advocacy, innovation and good governance provider for credit unions with the belief that all people should have access to affordable, reliable and sustainable financial services. With funding from a wide range of multi-lateral, government and private partners, World Council promotes economic security, resilience and livelihoods strengthening through the sustainable development of local, well managed, savings led financial institutions. World Council reaches the marginalized and traditionally unbanked populations and provides a range of affordable pro-poor financial products and services in 118 countries worldwide.

WOCCU's Cooperative Development Program, Technology, and Innovation for Financial Inclusion (CDP TIFI) activity, financed by the United States Agency for International Development, seeks to foster sustainable cooperative systems that deliver value to their members and serve their communities through innovative means. Working with local national associations that represent and provide technical support to multi-million-member networks of credit unions (CUs), the TIFI activity will develop and deploy an SME Finance Toolkit in four countries – Burkina Faso, Guatemala, Kenya, and Senegal – as it seeks to increase lending to small and medium enterprises (SMEs). Using the Finance Toolkit as a guide, TIFI will strengthen the knowledge, capabilities, and governance of CUs to deliver SME loans by building capacity at the national association (NA) level, testing at the CU level, and supporting the NAs as they scale the method to their member CUs.

To achieve these results, the activities and fundamental learning outputs of WOCCU's CDP TIFI project are linked to the objectives as follows:

- 1) The development and implementation of the SME finance toolkit, that improves cooperative business performance through increased member equity and improved CU market performance.



- 2) A clarified regulatory environment, increased understanding of the market and targeted customer segments and strengthened business development services that will improve the overall cooperative enabling environment.
- 3) To strengthen the cooperative movement, including through the dissemination of learnings.

In Kenya, the project is working with the Kenya Union of Saving and Credit Cooperatives, KUSCCO, and their member Savings and Credit Cooperatives (SACCOs) to research and develop an SME finance toolkit to expand the reach of SACCOs to Kenyan SMEs. As the project continues to develop and refine the SME finance toolkit as a central component of the project, TIFI Kenya has developed a core curriculum of training materials related to SME finance that will be delivered to the partner pilot SACCOs in the coming months. While this training was originally envisioned to be delivered through in-person sessions with select SACCO staff, due to the COVID-19 pandemic, the project has identified an opportunity to expand the reach of the project and engage partner SACCOs through virtual engagements.

In addition, KUSCCO's Education & Training (E&T) department is now developing experience in virtual training that it desires to enhance in order to make training available to more SACCO leaders around Kenya. There is the potential to expand the vision of the training department beyond the traditional in-person trainings and to determine how to reach greater numbers of people, people in rural and more remote areas where it is harder to achieve sufficient volume of participants to cover the costs of an in-person training, people who may have less seniority, women, youth, and underserved populations. A training strategy can be envisioned that continues with a mix of virtual and in-person trainings post-COVID-19 in order to broaden the reach and expand the impact of the training program.

## II. ACTIVITY DESCRIPTION

### A. Overview



Over the next two months (November – December 2020), the TIFI Kenya team will be working to finalize all relevant training materials and working to develop and hold virtual trainings with select SACCO staff. Through this consultancy, the selected consultant is expected to provide immediate support to the TIFI Kenya project team to identify best practices for virtual trainings, support the identification and integration of interactive training techniques into the existing virtual training curriculum, and design and implement interactive training sessions with the TIFI Kenya staff to promote best practices in action. The selected consultant will be a leader for assisting facilitators in the use and application of technologies but also in key sound adult learning principles to create valid competencies and curriculum to support well written objectives and competencies.

## B. Anticipated Scope of Work

Drawing on their extensive experience and knowledge of existing platforms and resources to facilitate interactive virtual trainings for adults, through this engagement the selected consultant should expect to implement the following activities:

- 1) Support development of a training strategy that is focused on adult learning** and demonstrable results including identification of baseline knowledge and evaluation post-training of implemented results;
- 2) Review existing training materials** and identify areas of integrating specific platforms or interactive content based on existing experience and knowledge. The consultant should be prepared to identify platforms, tools and solutions (presentation tools, whiteboards, chat tools, polls, etc.), engaging participation using different learning techniques, methods of facilitating virtual groups, receiving feedback from training participants, and how to enable continual engagement beyond the initial training sessions;
- 3) Augment training materials** with the support of TIFI Kenya staff to integrate interactive activities to their training curriculum and identify specific areas of additional support training as needed;
- 4) Provide direct training support** to select stakeholders (including the WOCCU Kenya team, KUSSCO's E&T team, and SACCO personnel) on training best practices, specific platforms or engagement channels, and best practices for creating continual engagement



with participants beyond the initial training session. The consultant will work closely with TIFI's Operations & Learning Officer to consolidate learnings and conduct a training of a trainer session so that the Officer may be able to amplify learning to other project beneficiaries;

- 5) Support the development of continued engagement resources** following training sessions to obtain insights into participant engagement, areas for improvement, and ensure the training resulted in effective adoption and use of new tools and methods;
- 6) Develop training resources and guides** that can be referenced in future training sessions and provided to TIFI partners when conducting their own virtual training sessions.

The consultant is expected to leverage their extensive experience and past resources to complete the envisioned activities and their recommendations should take into consideration the technical content included in the training curriculum and the local Kenya context to ensure relevance and uptake of their recommendations. The selected consultant may be required to participate in initial training sessions with the TIFI project team to provide on-the-spot support to the training, co-facilitate certain interactive sessions, and provide feedback for continual improvement to the TIFI Kenya team members for future sessions.

### C. Reporting

This activity is intended to remain iterative and respond to the needs of TIFI Kenya staff as identified through initial trainings with SACCO staff. The consultant is expected to provide feedback to the TIFI staff following the initial training sessions and work with the project to refine further training sessions to respond to the consultant's guidance and participant feedback. Reports should be presented to report on specific activities completed during the consultancy and identify specific areas of engagement, integration, and improvement. The selected consultant will be expected to report to the TIFI Chief of Party and TIFI Kenya County Coordinator for the duration of the contract.

## III. FUNDING



The ceiling for this activity is anticipated to be \$10,000 through either a fixed price or cost reimbursable contract. While it is not anticipated that funding will be awarded greater than the ceiling identified, cost proposals above this ceiling amount will be received and may be considered with adequate justification.

#### IV. INSTRUCTIONS FOR TECHNICAL PROPOSALS

In order to be considered for evaluation, an application must abide by the requirements identified in this section. Applications that do not respond to the requirements identified in this section will not be reviewed by WOCCU's technical evaluation committee. In addition, applications received after the submission deadline identified on the cover page of this solicitation will not be considered for evaluation. If this solicitation is amended, then all terms and conditions not modified in the amendment shall remain unchanged.

##### A. General Instructions

Applications are due no later than November 9, 2020, no later than 5:00 pm EST, to be submitted via email to [tifiopportunities@woccu.org](mailto:tifiopportunities@woccu.org). Please be sure to reference the solicitation number of this solicitation (**TIFI-K-2020-001**) in the subject line of the email. Late applications will be rejected except under extraordinary circumstances at WOCCU's discretion. Technical applications are limited to two pages, excluding staff CVs, capability statements, and cover letter.

This solicitation in no way obligates World Council of Credit Unions to award a contract, nor does it commit World Council of Credit Unions to pay any costs incurred in the preparation and submission of the bid. World Council of Credit Unions reserves the right to vary any part of this solicitation at the time of award if it becomes necessary. The submission to WOCCU of an application in response to this solicitation will constitute an offer and indicates the firm's agreement to the terms and conditions in this solicitation and any attachments hereto. WOCCU reserves the right not to evaluate a non-responsive or incomplete application.

##### B. Questions related to solicitation





Requests for clarification or additional information must be submitted in writing via email to Conor Farrell ([cfarrell@woccu.org](mailto:cfarrell@woccu.org)) by November 2, 2020, no later than 5:00 pm EST. No questions will be answered by phone

Copies of questions and responses will be distributed via email to all prospective bidders as well as posted as an amendment to this solicitation on WOCCU's career page.

### C. Proposal Cover Letter

A cover letter shall be included with the application on company letterhead (if appropriate) with a duly authorized signature using **Attachment A** as a template. The application cover letter should be sure to include a reference to the number of this solicitation, the total cost of the proposal and certify validity of **60 days** for the cost proposal included in the application.

### D. Technical Application requirements

In order to be considered for evaluation, the technical application for each firm should be sure to comply with the requirements set out in this section. Technical applications should be sure to demonstrate the firm's ability to complete the anticipated scope of work as described in **Section 2, Part B** of this solicitation or propose an alternative set of activities that will achieve the desired objective of this activity. Applications should consider conducting at least two separate, two-hour training sessions with key stakeholders from KUSCCO, WOCCU, and SACCOs. Each training session should plan to accommodate at least thirty participants so the technical application should document the platforms, processes, and plan to integrate interactive sessions within the training. Technical applications are limited to two pages, excluding proposed staff CVs, work plan/Gantt chart, and the cover letter. Application annexes (not counted in page limit) should include consultant CVs, two professional references, an anticipated work plan, and a list of previously completed engagements similar in scope to that which is detailed in this solicitation.

#### 1. Minimum Qualifications



To be considered for this assignment, an applicant should demonstrate the following minimum qualifications:

- Qualified Bachelor's degree or its international equivalent
- Demonstrated experience developing successful virtual training sessions and developing interactive training sessions;
- Prior experience working in Kenya or implementing virtual training sessions with Kenyan nationals;
- Proven expertise in curriculum development and clear knowledge of various virtual training platforms and training techniques;
- Knowledgeable about and have experience with participatory methods for virtual training;
- Demonstrable experience building and facilitating trust building and institutional change through training experiences, including engaging participants following initial training sessions;
- Skilled at delivering trainings in low connectivity or low resource settings;
- Strong written and oral communication skills;
- Experience developing engaging project presentation tools including data visualizations, PowerPoint presentations, and graphic design;

#### E. Cost proposal Requirements

The application should include a cost proposal or budget for the associated activity that corresponds to the technical narrative of the application. The budget will be reviewed based on criteria that evaluate cost reasonableness and applicability based upon the technical application. Budgets must be sufficiently detailed to demonstrate reasonableness and completeness. Applications including budget information determined to be unreasonable, incomplete, unnecessary for the completion of the proposed project, or based on a methodology that is not adequately supported may be deemed unacceptable.

## V. TECHNICAL EVALUATION

The following criteria will be used to evaluate each technical application. The number of points



assigned to each criterion represents its weight in the evaluation process.

Technical Criteria	Weight
<b>Virtual Training Experience</b> <ul style="list-style-type: none"><li>- Adequately demonstrates the consultant's understanding of project objective;</li><li>- Cover letter and application demonstrates the consultant's past experience meets the minimum requirements specified in Section IV, part D;</li><li>- Previous experience in managing activities related to those proposed in the solicitation;</li><li>- Experience virtual training sessions across different cultures and contexts;</li><li>- Demonstrated experience and knowledge of various virtual training platforms and applications;</li></ul>	<b>40 pts</b>
<b>Participatory Education Experience</b> <ul style="list-style-type: none"><li>- Demonstrated experience developing and designing interactive training curriculum;</li><li>- Experience integrating multiple participatory training techniques for adult learning;</li><li>- Previous experience in managing activities related to those proposed in the solicitation;</li><li>- Strong experience in developing interactive, virtual training sessions across different cultures and contexts;</li></ul>	<b>30 pts</b>
<b>Cost-Effectiveness</b> <ul style="list-style-type: none"><li>- Proposed costs reflect a clear understanding of the requirements stated in this solicitation, and costs are reasonable;</li><li>- The proposed price is reasonable in comparison with prices with the independent cost estimate;</li><li>- Proposed planned costs ensure optimal delivery of the proposed activities;</li></ul>	<b>30 pts</b>



- The budget demonstrates reasonableness and completeness based on the technical application.	
<b>Total</b>	<b>100pts</b>

## VI. AWARD DETERMINATION

### A. Technical Application Evaluation

WOCCU will review all complete applications that are received prior to the closing date of this solicitation and will make an award based on the evaluation criteria stated above and select the offeror whose applications provides the best value to WOCCU. WOCCU may exclude an offer from consideration if it determines that an application does not demonstrate a minimum level of experience or includes tasks that do respond to the overall project objective. While applications will be evaluated based on cost proposals received, WOCCU may award to a higher-priced offeror if a determination is made that the higher technical evaluation of that offeror merits the additional cost and the proposal is determined to include reasonable costs related in the technical application.

### B. Compliance Terms:

WOCCU will not enter into any type of agreement with a selected consultant before confirming the following factors are taken into consideration:

1. The source, origin and nationality of the products or services are not from a Prohibited Country (explained below).
2. Offeror can comply with required or proposed delivery or performance schedules.
3. Offeror has satisfactory past performance record and a satisfactory record of integrity and business ethics.
4. Offeror has the necessary organization, experience, accounting and operational controls and technical skills.
5. Offeror is qualified and eligible to perform work under applicable laws and regulations.



### C. Source and Nationality

Under the authorized geographic code for its contract WOCCU may only procure goods and services from the following countries. WOCCU has the option to seek a waiver to these requirements if selected Offeror is registered in a country outside of Geographic Code 937.

Geographic Code 937 states: "Goods and services from the United States, the cooperating country, and "Developing Countries" other than "Advanced Developing Countries: excluding prohibited countries."

A list of the "Developing Countries" as well as "Advanced Developing Countries" can be found at: <http://www.usaid.gov/policy/ads/300/310maa.pdf> and <http://www.usaid.gov/policy/ads/300/310mab.pdf> respectively.

By submitting an application in response to this solicitation, applications will confirm that they are not violating the source and nationality requirements of the goods or services being offered and that the goods and services comply with the geographic code and the exclusions for prohibited countries outlined above.

## VII. **DISCLAIMER**

This solicitation in no way obligates World Council of Credit Unions to award a contract, nor does it commit World Council of Credit Unions to pay any costs incurred in the preparation and submission of the bid. World Council of Credit Unions reserves the right to vary any part of this solicitation at the time of award if it becomes necessary. World Council of Credit Unions may cancel this solicitation or may reject any and all responses received. The issuance of this solicitation does not constitute award commitment by the World Council of Credit Unions.



# ATTACHMENTS

## ATTACHMENT A: COVER LETTER FORMAT

[On Firm's Letterhead – If application]

<Insert date>

TO: World Council of Credit Unions, Technology and Innovation for Financial Inclusion

We, the undersigned, provide the attached proposal in accordance with **TIFI-K-2020-001** issued on [DATE]. Our attached proposal is for the total price of <Sum in Words (\$0.00 Sum in Figures) >.

I certify a validity period of 60 days for the prices provided in the attached cost proposal. Our proposal shall be binding upon us subject to the modifications resulting from any discussions.

[Offeror shall detail here any items specified in this proposal that are relevant to evaluation review as deemed appropriate and necessary.]

We understand that WOCCU is not bound to accept any proposal it receives.

Yours sincerely,

Authorized Signature:

Name and Title of Signatory:

Name of Consultant or Firm:

Address:

Telephone:

Email: