

## **Re Advertisement - REQUEST FOR PROPOSALS**

### **DEVELOPMENT OF EPTF'S 2023-2027 STRATEGIC PLAN**

#### **1.0 Background and Introduction**

Navigators (EPTF) Kenya Trust is a ministry of the Navigators Kenya. The Navigators is a World Wide Partnership whose mission is to preach the gospel to the lost, establish the converts in their faith by in-depth discipleship, and equip them with skills to enable them to be committed and involved in the work of ministry. In pursuit of this, The Africa Navigators in the late eighties and the early nineties held consultations on Micro Enterprise Development (MED) in the continent in response to the prevailing poor economic situation. National ministries were encouraged to engage in MED to help their people better deal with the uncertain economic futures that they were facing. The Navigators saw microenterprise development as an opportunity to link the spiritual work of discipleship to the economic empowerment of the people, who would then be effective in ministry and give to the work of the movement.

Over the years, EPTF has directly reached more than 5,000 persons through its training, mentorship, and micro-finance activities. In doing so impacting thousands of lives in various regions in Kenya including but not limited to Nairobi, Machakos, Mombasa, Kwale, Kisumu, Nakuru, Eldoret, and Moiben.

EPTF has gone on to expand its scope of activities to include targeted interventions within peri-urban and rural areas, working hand-in-hand with Navigators Kenya staff and other global partners, to address livelihood challenges within these communities while aiming to develop a network of empowered kingdom-minded entrepreneurs who are transforming their communities. The focus areas have been Entrepreneurship Skills Training, Life Skills, Sustainable Agricultural Practices, Financial Literacy, and Artisan Skills training among others.

EPTF has been implementing a three-year strategic plan ("SP") that ends in 2022. We are initiating the process to develop the 2023-2027 Strategic Plan. We are therefore seeking the services of suitably qualified and experienced consulting firms or consortia of individual consultants to support the strategic planning process. The process will start with a thorough review and conclude with the development of a new 5-year strategic plan. This will be in consultation with all the key stakeholders of EPTF i.e., the Board of trustees, Staff, Navigators Kenya, and other stakeholders including community representatives (beneficiaries/participants).

The focus in the last 3 years has been to deepen the institutional capacity of EPTF to prepare it for the next phase of growth. The focus has been on strengthening governance and management systems, leadership and management capacity development, and greater alignment with the overall vision and mission of the Navigators Kenya ministry.

## **1.2. The Task**

The objective of this consultancy is to facilitate the development of a 5-year Strategic Plan for the Navigators (EPTF) Kenya Trust. The consultancy should utilize a participatory approach where all the relevant stakeholders for EPTF are consulted and their views taken into consideration.

As part of the process, the consultant will conduct a review of the current strategic plan for 2020 – 2022 with a focus on the following:

- a. The impact and sustainability of the outcomes to the beneficiaries/participants;
- b. The vision and calling of the founding organization – The Navigators Kenya;
- c. The reason why EPTF was founded 30 years ago;
- d. The current realities of the social problems in communities in Kenya;
- e. The sustainability of EPTF as an institution and its responsibilities to its stakeholders;
- f. The focus EPTF should embark on in the next 5 years.

## **1.2 The Process, Coordination & Outcomes**

The Consultant (s) will work under the overall leadership of the EPTF Board and in close consultation and coordination with the National Coordinator to plan for and facilitate the strategic planning meetings and the development of the 5-year Strategic Plan. The National Coordinator will facilitate access to relevant information and will arrange for review and key informant meetings with EPTF staff, Board, participant representatives, and any other important contacts as may be determined from the review and context analysis.

The Strategic Plan should give EPTF a clear framework within which to work, incorporating strong sustainability and institutional resilience focus, precisely outlining the pathways of the organization in relation to the new strategic objectives. It is expected that the plan will integrate the forward and onward thinking between ongoing programmatic work, the wider vision of the Navigators Kenya, and the need to be sustainable.

## **1.3 Specific Terms of Reference & Key Deliverables**

The review and planning processes should be structured in a way that supports active learning, team building, and ownership of the new strategy. Therefore, all the activities at all stages of the review and development process must be a participatory, multi-stakeholder process and must involve the Consultant(s) consulting with EPTF's key stakeholders. In consultation with the Board and National Coordinator, the consultant will be responsible for carrying out the following activities:

- a. Submit within 5 working days from the start of the assignment an inception report that incorporates the final work plan, final description of approaches and methodologies, field data collection plan and tools, and detailed description of each of the deliverables as per item 3.0
- b. Conduct desk review of relevant documents on EPTF including the website and the current 3-year strategic plan.
- c. Conduct field data collection based on agreed contacts and stakeholders list developed in close consultations with EPTF Board and National Coordinator.

- d. Facilitate and generate outputs from relevant consultation workshops/meetings with staff, board, beneficiaries, and stakeholders of EPTF as required, capturing relevant information including the following:
  - Analysis of EPTF's institutional strengths and weaknesses.
  - Environmental scan and analysis of significant opportunities and threats facing EPTF
  - Identification of key success factors for EPTF to deliver on its mandate.
  - Identification of thematic areas that will guide priority setting for EPTF.
  - Formulation of strategic options and selecting appropriate strategies to meet them.
  - Identification of the principal partners and focus participants/communities for successful implementation of the EPTF strategy.
  - Establishment of accurate controls for monitoring and evaluating the performance of the strategic plan as well as impact assessment.
- e. Hold periodic monitoring and progress review meetings with the National Coordinator every week or as necessary during this consultancy
- f. Lead stakeholder consultations, to discuss and crystalize thoughts around the impact of EPTF's past projects, and key thematic areas to focus on for the impact and sustainability of EPTF including setting targets (balanced scorecard) and the ideal organogram to support the SP.
- g. Develop a Performance Management Tool
- h. Draft an ideal organogram to support the SP
- i. Upon completion of the assignment, handover of all materials, tools, data, and information on persons involved to EPTF.

## **2.0 Roles & Responsibilities of EPTF**

EPTF management will be responsible for the following:

- a. Provision of relevant materials on EPTF (e.g. EPTF Strategic Note by The Board - 01/Aug/19, Organization Profile, 2020-2022 Strategic Plan, Navigators Calling, Core Values, and Global Vision)
- b. Provision of timely review and guidance on proposed detailed work plans and meeting agenda.
- c. Assistance with contacting and bringing together key stakeholders during the process.
- d. Review of draft reports and recommendations for production of the final documents.
- e. Management of logistics for the strategic planning process and workshop

## **3.0 Deliverables for the Consultant(s)**

The final products of this consultation will include:

- a. Inception report within 5 days (after the start date), the work plan, refined approach and methodology, Schedule of stakeholders interviews, list of all materials and documentation required, all the key data collection and analysis tools, a draft outline of the three outputs mentioned above, and the Strategic Planning process.
- b. Draft and final reports of the SP 2023-2027 review process.

- c. Joint Board & Staff Current SP Review Workshop notes of key outputs.
- d. Field data reports/notes
- e. Draft 2023-2027 Strategic Plan for Board and management inputs/review.
- f. Final stakeholders' validation workshop report/Notes.
- g. Performance Management Tool
- h. Ideal organogram to support the SP
- i. Resource Mobilization Plan
- j. Final 2023-2027 Strategic Plan (in hard and soft copies)
- k. Electronic copies of all final process reports in PDF and MS Word format.

#### **4.0 Time Schedule**

Navigators EPTF anticipates receiving final deliverables by November 30, 2022. The Consultant(s) is/are to advise on the proposed schedule based on the work plan developed. The anticipated timeframe for the consultancy is from 22 August to 30 November 2022.

#### **5.0 Qualifications of the Consultant**

EPTF is seeking consultant organizations with the following expertise:

##### Academic Qualifications:

- A Master's Degree in organizational development, strategic management, corporate governance, business and investment planning, or other relevant areas for the key members of the consultants' team;

##### Knowledge and Expertise:

- Knowledge of strategic planning frameworks, including the balanced scorecard (BSC) approach;
- Proved experience in strategic reviews and planning for non-governmental and religious organizations (experience with business organizations will be an added advantage), with references from at least 3 organizations arising from recent assignments successfully completed.
- Good knowledge and experience in Entrepreneurship skills, Agribusiness, Conservation Agriculture, Financial literacy, Access to credit, Life Skills, Artisan/Vocational training, and other related fields among the marginalized and vulnerable.
- Participatory approaches in conducting assessments and facilitating strategic direction planning processes
- Strategic direction planning document preparation

##### Skills and Competencies:

- At least 7 years of professional experience in strategic planning, and experience in organizational and change management is an added advantage.
- Strong written and oral communications skills in English; fluency in Swahili is highly desirable
- Must be result-oriented, highly motivated, team player, exhibiting high levels of tact, integrity, and transparency;
- Demonstrate excellent interpersonal and professional skills in interacting with government and development partners;

- Should have undertaken at least two assignments of a similar nature in the last 12 months;
- Excellent and proven analytical skills
- Demonstrated ability to meet deadlines.
- Demonstrated experience in working with NGOs
- Be an organization (and persons) of integrity.

#### **6.0 Terms of Engagement**

- The consultant will be paid 30% of the total agreed amount on the signing of the contract
- 30% on delivery of the draft Strategic Plan
- 40% on submission of the Final Strategic plan document and reports

#### **7.0 Procedures for Submission of Proposals**

Interested applicants should submit their proposals (technical and financial), CVs of the key team members, references, and daytime contacts by email to: **sp.naveptf@eptf.org** by 05<sup>th</sup> September 2022 indicating on the subject of the email “STRATEGIC PLAN DEVELOPMENT” and quoting the reference EPTF/2023-2027/SP

Proposals will be reviewed as they are received. If you have already submitted your proposal, there is no need to reapply.

**Navigators (EPTF) Kenya Trust is an equal opportunity organization and canvassing will lead to automatic disqualification**