



CEEC /FE/2019/06

**Request for Proposal (RFP)
For Conducting Training on Financial Engineering
Invitation to Submit Proposal**

March 19, 2019

Subject: RFP for conducting training on Financial Engineering

1. You are requested to submit a proposal for consulting services in respect of the above referenced subject. Your proposal could form the basis for a contract between your firm / institution and the Kenya Association of Manufacturers (KAM).
2. To enable you submit a proposal , please find enclosed :
 - a) Annex I: Proposal submission: Description of requirements for proposal submission;
 - b) Annex II: Terms of Reference (TOR), containing a description of KAM requirements for which these services are being sought.

Pre-qualification documents containing detailed terms and conditions of pre-qualification may be downloaded from the KAM website: www.kam.co.ke. Interested bidders will be required to pay a non-refundable fee of Kshs. 2,500 to the bank and provide original banking slip on top of the bid documents. The payment shall be made to: Kenya Association of Manufacturer KAM Collection A/C NO: 0948598736. Branch: Queensway House

Note:

This letter is not to be construed in any way as an offer to contract with your firm/institution.

Yours Sincerely,

**Phyllis Wakiaga
Chief Executive**

ANNEX I

Manner of submission

1. Your proposal shall be prepared in the English Language
2. Your proposal shall comprise the following documents:
 - a) Technical component and
 - b) Financial (price component)
3. Your proposal shall be prepared in duplicate with one marked “original” and the other marked “copy”. In the event of any discrepancy between them, the original shall govern.
4. Please insert dates and address as necessary

Content of Proposal

1. Technical Component

- a. Description of the firm and the firm’s qualifications;
- b. Copy of Company Certificate of incorporation
- c. Brief description of Understanding of the requirements for services, including assumptions;
- d. Proposed approach and methodology;
- e. Proposed team structure;
- f. Proposed project team members;
- g. Executive brief of relevant similar projects undertaken in the past 2 years.

ii) Financial (Price Component)

- a. A summary of the price;
- b. The period of its validity;
- c. Tax Compliant Certificate
- d. Statutory KRA PIN and VAT certificate copies

Payment terms (provisions)

Kenya Association of Manufactures policy is to pay for contractual services based on performance of contractual services rendered. **For this task, KAM intends to make all payments upon completion of the assignment**

Evaluation of proposals

A two stage procedure will be utilized in evaluating the proposals, with evaluation of the Technical component being completed prior to any price component. Scores will be awarded for the technical proposal.

The price component proposal will be opened only for those firms/ institutions whose technical component meets the requirements for the assignment, as indicated by a score of more than 70%.

Deadline for Submission

The proposals are to be submitted to **AAM resources, Purshotam House, Chiromo Lane, Next to Diagnostics centre, by April 05, 2019, at 12.00 p.m.** late submissions will not be opened.

Please Label the Envelope **“Financial Engineering Training”**

ANNEX II

Terms of Reference For Conducting Training on Financial Engineering

INTRODUCTION

The Kenya Association of Manufacturers (KAM) is collaborating with the Government of Kenya to implement energy efficiency activities in the country, with a view to reducing energy costs to Kenyan companies.

WHY FINANCIAL ENGINEERING?

The Financial Engineering Course is designed to enable participants acquire skills to conduct energy audits and develop bankable financial models for energy efficiency projects at industry level and other sectors of the economy and to facilitate a “common language” between engineers, managers and finance.

At the end of the course, participants will be able to develop energy saving projects from the idea stage to the point of securing financing for the proposal. Practical projects from the participants’ work place will be carried out by the participants giving them hands on experience.

KAM through the Centre of Energy Efficiency and Conservation (CEEC), offers training on Financial Engineering to provide participants with modern Financial Engineering principles that lead to reduction in energy costs.

OBJECTIVE

The Financial Engineering Training is designed to equip management and technical personnel with modern approaches to Financial Engineering as relates to energy management. Upon successful completion of this training, the participants will have covered pertinent issues on Financial Engineering.

CONSULTANT ACTIVITIES

The activities will include:

1. Development of detailed course content.

2. Prepare materials and make copies of training materials for the participants. The copies will be **bound** and legible and will be available for ALL the Participants and two copies for KAM (records). In addition make one soft copy for KAM.
3. Deliver a training module lasting 4 days on Financial Engineering Training. The lecture content will include but not limited to the following:

Fundamentals of Technical and Economic analysis of projects

- Introduction to energy management and auditing
- Identifying energy efficient options within the firm
- Performing basic cash evaluations of the options.

Economic and financial development of projects

- Developing a financial evaluation of the project
- Putting the project into “bankable” form for financing, and
- Integrating energy efficiency into the company investment plan

Measurement and Verifications of project implementation; integration into management

- Implementation of the project and assuring long term performance of the project
- Making presentations of the project to company/bank executives, and
- Integrating energy efficiency investments into the company investment plan.

Proper delivery of training to the technical participants using recent materials. The Trainer will be expected to use practical illustrations from the industry with emphasis on the Kenyan industry

OUTPUTS

1. A training report which should include
 - all the training materials and course contents
 - An analysis of the course evaluation forms and recommendation
 - List of attendees etc

APPROACH

The company will work under the direction of the CEO of KAM, and the Centre for Energy Efficiency and Conservation (CEEC). KAM will provide documents to the consultant as necessary.

TIME SCHEDULE AND LEVEL OF EFFORT

The assignment will be carried out over a period of **10 days**. The period can be extended by the KAM CEO if deemed necessary.