

**REQUEST FOR PROPOSAL**

**RFP-042-PIL-2024**

**CONSULTANCY SERVICE TO ESTABLISH AN ORGANISATIONAL LEARNING MANAGEMENT SYSTEM  
(LMS) FOR THE INTERNATIONAL TAX JUSTICE ACADEMY.**

**RFP ISSUE DATE: - 30<sup>TH</sup> APRIL 2024.**

**Disclaimer: TJNA may at any time terminate the RFP without entering into a contract and reserves the right to accept or reject any or all applications and is not bound to give reasons for its decision. TJNA is also not obligated to award the procurement to the firm that offers the lowest price.**

## SECTION 1 - INVITATION LETTER FOR REQUEST FOR PROPOSAL.

RFP REF NO.: - RFP-042-PIL-2024

RFP Reference No.	RFP-042-PIL-2024
Title of Tender	CONSULTANCY SERVICE TO ESTABLISH AN ORGANISATIONAL LEARNING MANAGEMENT SYSTEM (LMS) FOR THE INTERNATIONAL TAX JUSTICE ACADEMY.
Issuing Office & Address	TAX JUSTICE NETWORK AFRICA Jaflo Limited, Block 3 - 106 Brookside Drive, Westlands Website: - <a href="https://taxjusticeafrica.net/">https://taxjusticeafrica.net/</a>
Location of this Assignment	Nairobi-Kenya
Point of contact for clarifications & questions	TJNA Procurement Unit, <a href="mailto:procurement@taxjusticeafrica.net">procurement@taxjusticeafrica.net</a> cc; <a href="mailto:gsirima@taxjusticeafrica.net">gsirima@taxjusticeafrica.net</a> ; <a href="mailto:nbusingye@taxjusticeafrica.net">nbusingye@taxjusticeafrica.net</a> .
Amendment of RFP Documents	At any time before the submission of proposals, the Client, TJNA may for any reason, whether at its own initiative or in response to a clarification requested by an invited firm, amend the RFP. Any amendment shall be issued in writing through addenda. The addenda shall be sent by mail to all invited consultants and will be binding on them. The Client may at his discretion extend the deadline for the submission of proposals, if deemed necessary, to allow bidders reasonable time to take the amendment into account.
Email address for submission of Proposals	TJNA Procurement Unit, <a href="mailto:procurement@taxjusticeafrica.net">procurement@taxjusticeafrica.net</a>
Deadline for submission of questions and clarifications	09 <sup>th</sup> May 2024
Deadline for Answering questions and clarifications	10 <sup>th</sup> May 2024
Deadline for submission of Proposals	Please include the subject line "RFP-042-PIL-2024" in the email.
Anticipated Award Type	Consultancy Agreement
<b>PRELIMINARY/MANDATORY EVALUATION CRITERIA</b>	
	<p><b>Preliminary Mandatory Requirements</b> Bidders will be evaluated on the following mandatory requirements and those who fail to submit any of the documents below will not be considered for evaluation in the subsequent steps.</p> <p><b>Registered Firms/ Individual Entities: -</b></p> <ol style="list-style-type: none"> <li>1. Certificate of registration or Incorporation/IDs for individual-based consultant</li> <li>2. Copy of List of Directors, Shareholders, and beneficial owners (CR12)</li> <li>3. Tax Compliance</li> <li>4. Valid business permit from country of jurisdiction</li> <li>5. Submission Technical Proposal</li> <li>6. Submission of the financial proposal</li> <li>7. Previous Experience (Reference letter/LSO/Contract)</li> <li>8. CVs for the proposed team</li> </ol>

## **SECTION 2: INSTRUCTIONS TO BIDDERS**

### **1. BACKGROUND**

Tax Justice Network Africa (TJNA) is a pan-African network established in 2007, with 48 member organisations in 26 African countries. The network envisions a new Africa where tax justice prevails, to contribute to an equitable, inclusive, and sustainable development. TJNA's mission is to spearhead tax justice in Africa's development by enabling citizens and institutions to promote equitable tax systems through policy influencing mobilise African citizens and challenge public institutions to influence and change policy to enable tax justice to prevail in Africa. The coordination of the network's activities is delivered by a secretariat based in Nairobi, Kenya.

TJNA seeks to promote socially just, accountable, and progressive taxation systems in Africa. This is by advocating for tax policies with pro-poor outcomes and tax systems that curb public resource leakages and enhance domestic resource mobilisation. It aims to achieve this by challenging harmful tax policies and practices that on one hand facilitate illicit financial outflows of resources and on the other hand favor the wealthy, while aggravating and perpetuating inequality.

The entire work portfolio of TJNA is structured and implemented within the confines of four strategic thematic areas that structurally keep the network mission alive. These are:

1. Tax and the International Financial Architecture,
2. Tax and Investments,
3. Tax and Natural Resources Governance, and
4. Tax and Equity.

### **Capacity Building at TJNA**

Capacity building is one approach to TJNA's network strengthening and collaboration. Through this approach, network members and partners are enabled to drive a progressive tax agenda in their respective jurisdictions. This is realized through training, peer learning events, the community of practice, mentoring, coaching, and other forms of accompaniment. TJNA also runs the International Tax Justice Academy (ITJA) as a capacity-building facility. ITJA provides an opportunity for structured and sustained capacity-building processes with a collective ambition to build the next generation of tax justice champions.

### **International Tax Justice Academy (ITJA)**

Tax Justice Network Africa (TJNA) through its flagship programmes tries to identify and develop stakeholders' capacity within the taxation and tax justice space. One of these flagships, the International Tax Justice Academy (ITJA) is a platform for continuous capacity development processes designed to mobilize, empower, and inspire citizens across Africa to bridge the existing knowledge gap on tax justice within the continent. Launched in 2016 the academy boasts of being a well-followed pan-African capacity strengthening initiative within the tax

justice space. Having gathered lessons from implementing previous years' events, TJNA is committed to revamping the academy, seeking to pilot new initiatives that build on lessons learned while addressing the increasing and diverse capacity needs within the tax justice space. Among the activities lined up for the revamping process is the establishment of an online Learning Management System (LMS) aimed at addressing the increasing and diverse learning needs of both participants and trainers within the tax and tax justice space. Guided by its overall theme "Building the next generation of tax justice champions," ITJA is implementing an ambitious three-phased training approach that is comprised of three levels of learning, namely: 1). Foundational, 2). Intermediate and 3). Advanced. The Academy, therefore, intends to fulfill the learning needs of the different target learners across levels.

### **Rationale For This Assignment**

The International Tax Justice Academy (ITJA) has developed and is enhancing capacity-building training courses around tax justice. This includes complete training curricula, and stand-alone training topics together with accompanying training support materials that have been piloted and rolled out in the past few years and delivered through in-person workshops, hybrid sessions, and subsequently as modular virtual training sessions for selected training recipients across Africa.

Online learning is intended to complement and propel the recently commenced and envisioned initiative of revamping the ITJA, which among other things includes reviewing and further developing the training curriculum, sustaining the academy activities beyond a one-off training event, increasing the number of training, and graduating participants to the next levels and making use of the academy alumni and the wide pool of professionals across the continent. An easily accessible and friendly online learning platform with the right learning support features will broaden TJNA's capacity-building reach and allow for unique learning approaches like self-paced and individualized follow-up of learners. This will allow localized tax justice actors to enroll in the courses and benefit from the quality-assured training content to enhance their capacities in the tax justice campaign in Africa.

### **2. PROPOSAL SUBMISSION**

Interested and Eligible consultants/consortiums are required to submit their application in the English language with the following specific information: -

- Experience in similar assignments.
- Availability of appropriate key staff to be involved in the assignment.
- A brief profile of the firm including a description of the firm.
- Proposed work plan and approach/methodology/concept.

Interested consultants may obtain further information from our website: <https://taxjusticeafrica.net/>.

2.1 The Technical and Financial Proposals must be submitted separately to ([procurement@taxjusticeafrica.net](mailto:procurement@taxjusticeafrica.net)) by **17<sup>th</sup> May 2024 @5:00PM**.

## 2.2 Association

Consultants may associate with other firms in the form of a Joint venture or a sub-consultancy to enhance their qualifications (provide group agreement to the effect) Shortlisted consultants may associate with non-shortlisted consultants ONLY after seeking written approval from TJNA.

## 2.3 Grounds for Exclusion

Organizations or Individuals are to be excluded from participating in this RFP if: -

- a) They are declared prohibited by TJNA because of their involvement in corrupt or Fraudulent practices in Procurement.
- b) TJNA staff or management involved in the procurement process have a financial interest.  
in, or close relatives working with, the organization or individual.
- c) they are bankrupt or are being wound up, whose affairs are being administered by a court, who have entered an arrangement with creditors, who have suspended business activities or who are subject to an injunction against running the business by the court.
- d) they are the subject of proceedings for a declaration of bankruptcy, for an order for compulsory winding up or administration by the court, or for an arrangement with creditors or of any other similar proceedings.
- e) They have been convicted of an offense concerning their professional conduct by a court.
- f) they have been found guilty of grave professional misconduct; or
- g) They have not fulfilled obligations relating to payments of taxes or social security contributions.

## 2.5 Validity of Proposal

Proposals must remain valid for **90 calendar days** after the proposal submission deadline.

## 2.6 Communication

Communication between bidders or their agents and any official of TJNA is strictly forbidden except as provided for in the relevant sections of this RFP. Infringement of this clause may lead to automatic disqualification from the bid process.

## 2.7 Taxes

The financial proposals shall include all applicable taxes quoted separately. If taxes are not mentioned in the financial proposal, TJNA shall consider that they are included in the prices provided.

## 2.8 Currency

The financial proposal shall be in **Kenya Shillings (KES)** or **US Dollars (USD)**.

## 2.9 TJNA Policy and Standard Terms and Conditions

### a) TJNA Employees

All proposals must indicate any/all known TJNA employees and/or near relatives who hold a position in your organization or have been engaged as a consultant for your organization within the last two years. Also indicate any known TJNA

employees or near relatives that own or control more than a ten percent (10%) interest in your organization; If There are none, state so.

**b) Conflict of Interest**

The Consultant shall not hire any officer or employee of TJNA to perform any service covered by this agreement. The Consultant should ascertain that to the best of their knowledge, there exists no actual or potential conflict between the Consultant's family, business, or financial interest and the service provided under this agreement, and in the event of a change in either private interests or service under this agreement, any question regarding possible conflict of interest which may arise because of such change will be raised with TJNA.

The Consultant shall not be in a reporting relationship with a TJNA employee who is a near relative, nor shall the near relative be in a decision-making position with respect to the Consultant.

**c) Ethics**

The Consultant will exercise extreme care and due diligence to prevent any action or conditions which could result in conflict with the best interest of TJNA.

Throughout the term of any agreement resulting from the RFP, Consultant will not accept any employment or engage in any work which creates a conflict of interest with TJNA or in any way compromises the work to be performed under this RFP or any agreement resulting from this RFP. The Consultant and its employees will not offer gifts, entertainment, payment, loans, or other gratuities or consideration to TJNA employees, their families, other Consultants, subcontractors, or other third (3<sup>rd</sup>) parties for the purpose of influencing such persons to act contrary to TJNA's interest or for personal gain. The Consultant will immediately notify TJNA of all such violations of this clause upon becoming aware of such violations.

**d) TJNA's Right to Reject or Modify**

Selection of a proposal does not mean that all aspects of the proposal(s) are acceptable to TJNA. TJNA reserves the right to negotiate the modification of the proposal terms and conditions prior to the execution of a contract, to ensure a satisfactory procurement.

**e) Supplemental Terms and Conditions/Modifications**

Any supplemental terms or conditions, or modification or waiver of these terms and conditions must be in writing and signed by a Consultant and TJNA.

**3.0 Form of Agreement**

The contents of this RFP and the proposal document of the successful Consultant shall become contractual obligations as part of the Contract if acquisition action ensues. Failure of a successful Consultant to accept these obligations in a contractual agreement shall result in the cancellation of the award. TJNA reserves the right to negotiate provisions in addition to those stipulated in this RFP or proposed by a consultant for the purpose of obtaining the best possible contract.

- **Marketing References**

The successful Consultant shall be prohibited from making any reference to TJNA, in any literature, promotional material, brochures, or sales presentations without the express written consent of TJNA.

### 3. OBJECTIVE AND SCOPE OF WORK

The assignment seeks to establish an e-learning platform, specifically a Learning Management System to support the virtual training and capacity-building needs of the International Tax Justice Academy. This platform targets to fulfil the diverse capacity-building needs of training facilitators, participants, and administrators from across the five African regions. The platform will serve to compliment the delivery of the in-person learning forums on one side and to fully cover the stand-alone virtual learning needs on the other. The role of the LMS development expert is crucial as they will be taking the lead in enabling a whole team in charge of delivering online training, post-training follow-up, facilitating other learning workshops, and managing a wide range of capacity-building initiatives within the tax justice space.

The expert will take the lead on the full circle of the LMS development, including research design and execution, desk reviews, situational analysis, actual platform development, testing the application, training stakeholders, development of a user guide, and provision of periodic implementation support and maintenance service. While establishing the learning platform, the specialist will hold coordination meetings with key stakeholders from TJNA.

**Specific objectives of this assignment are:**

1. Examine the TJNA capacity-building approaches in relation to training, learning management procedures, participants onboarding, accessibility and other prerequisites and propose a design layout for deliberation and adoption.
2. Develop the actual LMS platform with all the necessary learning enhancement features at both the backend/server side and the user interface side. These include:
  - a. Learning portals for each user.
  - b. Own branding and own labelling provisions.
  - c. Automation of managing services e.g. engaging users, integrating with TJNA systems (webinar tools, administrative systems, SharePoint), triggered notifications among others.
  - d. Learner-friendly experience – easy to use, easily accessible from anywhere, affordable, used with a variety of devices, self-select and self-direct learning.
  - e. LMS exam feature to automate examination.
  - f. Provision for learning assessments and evaluations, surveys, and notices feature.
  - g. Blended learning features combining online self-learning with live training and webinars. Support hosting of a wide range of learning resources including reading documents, videos, audio, and pictorials among others.

- h. Interactive learning with provisions for user roles, group engagements and connection to social learning tools like Learning hubs, LinkedIn, X among others.
  - i. Reporting features – showing data on user access, exams, surveys among others.
  - j. Skills and certification tracking.
  - k. E-commerce provisions to cater for fee for service arrangements.
  - l. Friendly data migration capabilities.
  - m. Multilingual interface provisions.
  - n. User and information security.
  - o. Platform reliability to accommodate the high number of users at different levels with minimal interruptions to their courses.
3. Train and induct the training facilitators, back-end training managers, and back-end administrators on the use and management of the LMS in enhancing training and other capacity-building processes.

The LMS expert will take the lead in the entire LMS development and induction process, including desk reviews, situational analysis, development of the actual system, its testing, training, and providing maintenance support. Key tasks and responsibilities will include:

- a. Ensure that the LMS features are in conformity with the ITJA capacity-building needs.
- b. Ensure that the platform features respond to the target users in terms of clarity and ease of use, adequacy, and all-time accessibility.
- c. Provide leadership in developing the assignment work plan and coordinating its successful implementation at all stages.
- d. Facilitating stakeholder reflections, meetings, consultations, and other relevant joint activities.
- e. Preparing brief reports/notes of progress on different deliverables and

#### 4. KEY DELIVERABLES, DURATION AND TIMELINES:

All deliverables are expected to be completed and presented to TJNA within a maximum duration of four months from the commencement date, and not later than 30th August 2024.

KEY DELIVERABLES	TIMELINES 2024
1. Inception Report detailing understanding of the scope of work, methodology, changes in Terms of Reference, list of LMS requirement specifications and a realistic workplan	By 10 <sup>th</sup> June
2. Presentation of draft functional LMS platform displaying all relevant specifications and features (as stated under specific objective 2 above)	By 20 <sup>th</sup> June



3. LMS platform functionality testing. This entails a learning test run utilizing all applications and resources by actual users on both live and other virtual sessions.	By 28 <sup>th</sup> June
4. LMS software deployment complete with live server, functional storage, and user manual	By 9 <sup>th</sup> July
5. Knowledge transfer to key stakeholders through training/induction	By 16 <sup>th</sup> August
6. Assignment completion report including onboarding the Intermediate course, addressing possible risks/challenges, and provision of a support and maintenance service plan.	By 30 <sup>th</sup> August

## 5. CONSULTANCY MANAGEMENT

The assignment will be managed by TJNA Capacity Building Coordinator, who will internally report to the Departmental Manager, Partnerships, and Institutional Learning. This will entail ensuring the consultant is adequately informed and prepared about TJNA capacity building initiatives and their role, ensuring that all deliverables are met with the completion and standards required, with all the administrative engagements made in good time and in the procedures set. The results of the consultancy will at different stages be conveyed to TJNA through formal email communication.

## 8. EXPERIENCE AND SKILLS REQUIRED:

1. Consultant must be educated/professionally trained in IT, Digital learning/training, Media/Communications designs, or related fields.
2. At least 8 years' experience in the field of IT projects, digital learning, and training.
3. At least 5 years' professional working experience in developing e-working tools and platforms including personnel, financial and time management tools, project management, and e-learning tools.
4. Demonstrated ability in working with clients, subject matter experts, and other stakeholders to produce high-quality e-learning platforms that meet their requirements within the specified time, scope, and budget, while managing stakeholder communication processes.
5. Demonstrated experience and knowledge of new learning technologies in an ever-changing environment.
6. Skills in appraising e-learning platforms to determine and strengthen learning effectiveness.
7. Effective knowledge and use of e-learning technologies and demonstrated ability in training other users.

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## HOW TO APPLY:

Please submit the following by 17:00hr East African time on **17<sup>th</sup> May 2024** to [procurement@taxjusticeafrica.net](mailto:procurement@taxjusticeafrica.net) with the email subject: **RFP-042-PIL-2024:- CONSULTANCY SERVICE TO ESTABLISH AN ORGANISATIONAL LEARNING MANAGEMENT SYSTEM (LMS) FOR THE INTERNATIONAL TAX JUSTICE ACADEMY.**

The service provider will be selected based on:

1. Relevance and specific experiences in relation to the TOR.
2. Availability, efficiency, and experience to deliver the assignment.
3. A technical proposal, outlining the consultant's understanding of the TOR, proposed methodology, timelines, and similar assignments conducted in the past.
4. Proof/Evidence of similar assignments conducted in the past (Previous experience).
5. A financial proposal including all fees in **(KES or USD)**
6. Key personnel criteria CVs and cover letter outlining one's competence in the design, development, use, and maintenance, and induction of a Learning Management System, and the suitability to undertake this consultancy service.