

REQUEST FOR PROPOSAL

RFP-041-PIL-2024

CONSULTANCY SERVICES FOR THE DESIGN AND DEVELOPMENT OF AN INTERMEDIATE-LEVEL TAX JUSTICE TRAINING CURRICULUM FOR THE INTERNATIONAL TAX JUSTICE ACADEMY.

RFP ISSUE DATE: - 30TH 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-041-PIL-2024

RFP Reference No.	RFP-041-PIL-2024
Title of Tender	CONSULTANCY SERVICES FOR THE DESIGN AND DEVELOPMENT OF AN INTERMEDIATE-LEVEL TAX JUSTICE TRAINING CURRICULUM FOR THE INTERNATIONAL TAX JUSTICE ACADEMY.
Issuing Office & Address	TAX JUSTICE NETWORK AFRICA Jaflo Limited, Block 3 - 106 Brookside Drive, Westlands Website: - https://taxjusticeafrica.net/
Location of this Assignment	Nairobi-Kenya
Point of contact for clarifications & questions	TJNA Procurement Unit, procurement@taxjusticeafrica.net cc; gsirima@taxjusticeafrica.net ; nbusingye@taxjusticeafrica.net .
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, procurement@taxjusticeafrica.net
Deadline for submission of questions and clarifications	09 th May 2024
Deadline for Answering questions and clarifications	10 th May 2024
Deadline for submission of Proposals	Please include the subject line "RFP-041-PIL-2024" in the email.
Anticipated Award Type	Consultancy Agreement
PRELIMINARY/MANDATORY EVALUATION CRITERIA	
	<p>Preliminary Mandatory Requirements 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>Registered Firms/ Individual Entities: -</p> <ol style="list-style-type: none"> 1. Certificate of registration or Incorporation/IDs for individual-based consultant 2. Copy of List of Directors, Shareholders, and beneficial owners (CR12) 3. Tax Compliance 4. Valid business permit from country of jurisdiction 5. Submission Technical Proposal 6. Submission of the financial proposal 7. Previous Experience (Reference letter/LSO/Contract) 8. CVs for the proposed team

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 identifies and develops stakeholders' capacity within the taxation and tax justice space. 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 is a successful 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 development of comprehensive training curricula aimed at addressing learning needs at three levels, these being: 1). Foundational, 2). Intermediate and 3). Advanced levels. Guided by an overall theme “Building the next generation of tax justice champions” the curriculum development process commenced last year, with the foundation-level section developed and tested. The Academy, therefore, intends to proceed to develop the Intermediate level curriculum as a build-up to the Foundation one. Subsequently, an advanced-level curriculum will be developed to complete the training levels. This assignment therefore focuses on developing the Intermediate training curriculum. It will, however, look backward to review the foundation-level curriculum, as well as shed light on possible training areas to go into the Advanced level during subsequent years.

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) by 17th 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 (3rd) 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 cancellation of 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

This assignment seeks to build on previously done work in the development and testing of the foundation-level curriculum that happened in 2023. The Foundation course content is comprised of six training modules that were primarily designed around the Four TJNA strategic themes. These modules were designed to introduce entry-level participants to the tax justice space and are titled as follows:

- Module 1: Foundations of Taxation.
- Module 2: Tax Justice 1.
- Module 3: Foundations of International Taxation.
- Module 4: Tax Transparency and Accountability 1.
- Module 5: Natural Resource Taxation.
- Module 6: Foundations of Tax Expenditure.

It is within this backdrop that TJNA is seeking a Curriculum Development Specialist to audit the existing Foundation level curriculum, refine it, and build on it to develop the Intermediate level training curriculum. This curriculum will include the training modules and content that comprise the specific sessions, session quizzes/tests, reading materials, and references tailored to meet the training needs of participants graduating from the foundation level and

other tax justice practitioners seeking to acquire knowledge at that very level of learning. The specialist will further induct the trainers and facilitators who will primarily implement the course. The product will be used as the primary reference during the preparation and delivery of intermediate-level training courses at the International Tax Justice Academy event scheduled to take place in August 2024. The training approach of the course should take into consideration a mix of theoretical and practical learning.

Specific objectives of this assignment are:

1. Conduct a technical review and analysis of the existing foundation-level training content, and refine it into an up-to-date, ready-for-use curriculum, while retaining the strategic framework of the four TJNA thematic areas.
2. Design and develop an elaborate intermediate-level curriculum building on the six foundation training modules.
3. Develop the necessary training resources/materials for the intermediate level. These include; Course objectives, subject areas/modules, specific session content, reading materials, session tests/quizzes, and references.
4. Induct TJNA training facilitators on the developed curriculum, training methodology, and the use of other developed learning materials appropriate to the target course participants.
5. Oversee the testing of the Intermediate training curriculum and recommend key areas of the Advanced level training.

Key tasks to support implementation of the above objectives:

1. Provide leadership in developing the assignment work plan and coordinating its successful implementation at all stages.
2. Facilitating stakeholder reflections, meetings, consultations, and other relevant joint activities.
3. Preparing brief reports/notes of progress on different deliverables and flagging any pending matters.

4. KEY DELIVERABLES, DURATION AND TIMELINES:

All deliverables associated with the curriculum development and induction are expected to be completed and presented to TJNA within a maximum duration of five months from the commencement date, and not later than 30th September 2024.

KEY DELIVERABLES	TIMELINES 2024
1. Inception Report detailing understanding of the scope of work, consultant's methodology, changes in Terms of Reference, a realistic work plan, and a draft curriculum design layout including a statement of intended outcomes and content layout.	By 10 th June
2. Refined Foundation training course curriculum. This product will contain reviewed, updated, and newly developed training areas within the existing framework consisting of Clear course objectives, course modules, specific training sessions with main topics and subtopics, Learning experiences, and extra Learning Aids.	By 24 th June

<p>3. Intermediate training curriculum product. This will include:</p> <ul style="list-style-type: none"> i. Course objectives: Course standard outline, course objectives, duration, target participants, and training outcomes. ii. Course content: Course modules, specific training sessions, their flow and duration, content/subject matter of each session including main topic and subtopics. iii. Learning experiences: Instructional materials including real examples and practical scenarios, learning approach and methodology per session, iv. Supplementary training content, videos, audio, images, illustrations, and other interactive aids. 	By 15 th July
<p>4. Development of curriculum learning support materials. This entails: Specific sessions reading materials/handouts, session assignments/tests/quizzes, and references.</p>	By 22 nd July
<p>5. Stakeholder validation forum: This will entail inducting key stakeholders (mainly training facilitators) to enable them to deliver the training program within a common goal to the target participants. This will entail a discussion on the course structure, content, methodology, and intended outcome.</p>	By 31 st July
<p>6. Pilot delivery and revision: The Consultant will act as an observer during the implementation of the actual in-person intermediate course. They will work to ascertain the effectiveness of the course content and identify areas of improvement.</p>	By 30 th August
<p>6. Final report: The Consultant will develop an assignment report in English detailing the methodology adopted, final outcomes, challenges faced, recommendations, curriculum revision, and proposed training areas for the advanced level course.</p>	By 20 th September

5. METHODOLOGY:

The consultant will be given access to different resources to aid their work at different stages. Such resources include the existing foundation-level training curriculum and its accessories, and other relevant documentation. Arrangements will also be made to meet stakeholders, including the ITJA organizers, trainers, TJNA Management, and past participants among others. This will allow the consultant room to reflect and design a process that meets the curriculum development needs of ITJA.

6. CONSULTANCY MANAGEMENT

The assignment will be managed by the 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 ITJA 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 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. At least 10 years' experience in leading curriculum development and review process.
2. At least 10 years' experience in developing capacities of organisations and providing technical assistance, curricula design, development, and implementation on tax justice.
3. Demonstrated experience and knowledge in new learning technologies in an ever-changing environment.
4. Experience in practicing and implementing different training methodologies with a focus on adult learning facilitation techniques.
5. Profound knowledge of theories, techniques, and methodologies of curriculum and instructional design with proven experience in the aforementioned fields.
6. Skills in audit and evaluation processes that determine learning effectiveness are a plus.
7. Strong capacity-building and coaching skills.
8. Effective knowledge and use of technology.
9. Experience collecting and analysing quantitative and qualitative data.
10. At least 5 years' experience working with civil society, and experience of networks/coalitions will be an added advantage.
11. Experience and understanding of advocacy/campaigning on tax Justice in sub-Saharan Africa.

HOW TO APPLY:

Please submit the following by 17:00hr East African time on **17th May 2024** to procurement@taxjusticeafrica.net with email subject: **RFP-041-PIL-2024: -: ITJA**

INTERMEDIATE TRAINING CURRICULUM DEVELOPMENT

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 covering letter outlining one's competence in tax and tax justice subject, and the suitability to undertake this consultancy service.