

UNAITAS EXPRESSION OF INTEREST

Unaitas Sacco Society Ltd is among the fastest growing institutions in Kenya established under the Co-operative Act 2008 and regulated by the SASRA Act 2010 with a membership of well over 200,000 spreading across 21 branches countrywide.

Unaitas has a vision To Be The Global Financial Movement That Enables You to Realize Your Dreams and Aspirations by Transforming Lives Through Provision of Innovative Financial Solutions.

If you are looking for excellence, a team that promotes high performance culture and focus on individual empowerment, then Unaitas is the place to be.

We are hereby inviting competent firms to express interest for the provision of;

- 1. Consultancy Services for Development of a Strategic Plan;
Tender No; Unaitas001/EOI/SP/2018**
- 2. Provision of Mobile Application platform; Tender No;
Unaitas001/EOI/MA/2018**

Additional information and detailed instructions regarding this EOI can be found in our Website, www.unaitas.com.

Qualifying organizations are required to register their interest by sending an email to procurement@unaitas.com. Deadline for registration of interest, as well as seeking clarifications, is Friday, 12 January 2018 (17.00p.m, East Africa Time).

Deadline for submission of EOIs (submission guidelines provided as part of detailed instructions): Wednesday, 17 January 2018 (10:00am, East Africa Time).

Unaitas Sacco Society Limited
Head Office
Cardinal Otunga Plaza
Kaunda street, Nairobi.

Tel: 0721 244 139
Box: 38721 - 00100 Nairobi.

e-mail: info@unaitas.com
website: www.unaitas.com

The original and all copies of the **Expression of Interest** shall be placed in a sealed envelope clearly marked **“EOI PROPOSAL”**; **The two EOIs are separate, therefore envelopes MUST bare clearly marked EOI names and tender numbers** addressed to: -

Chief Executive Officer
Unaitas Sacco Society Limited,
P.O Box 38721-00100
Tel; +254 721 244 139
Attn: HEAD OF PROCUREMENT

And deposited in the Tender Box available at Unaitas Headquarters, Cardinal Otunga Building 2nd FLOOR, Kaunda Street, Nairobi so as to reach him on or before Wednesday 17th January 2018 at 10.00 am

The Technical Proposals shall be opened immediately thereafter in the presence of consultants or their representatives who choose to attend on the same date and time at Unaitas Head Office, Boardroom.

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I. Consultancy Services for Development of a Strategic Plan; Tender No; Unaitas001/EOI/SP/2018

ToR–Consultancy Services for Development of a Strategic Plan

This is what will constitute the Terms of Reference for consultancy services on development of the Strategic Plan for the period, 2018-2020. The scope of work for the consultant will include but not limited to:

- i. Reviewing the current strategic plan and its implementation, highlighting key achievements, factors contributing to success and challenges encountered.
- ii. Guiding Unaitas Strategy Team through the strategy development and formulation process.
- iii. Contributing to development of the Strategic Plan
- iv. Providing support for the implementation of the strategic plan.

The Consultant will be expected to demonstrate an experience in successful development of strategic plans in related sectors.

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**I. Provision of Mobile Application platform; Tender No;
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CONCEPT PAPER AND CHANGE REQUEST

**SPECIFIC REQUEST: Implementation of Unaitas owned M-Banking
Solution**

Executive Summary

With the intention to redefine our business model, digital platforms are going to be a must in the delivery of our services to the selected client segments. In the current arrangement, we have seen adoption by our clients on the few digital solutions go up and we intend to increase usage in line with our target to grow non-funded income to above 50% of the total income. We also intend to use the same platforms to grow our mobile lending portfolio in line with our direction to grow our short-term facilities for increased income and better liquidity management.

It is in this regard, this proposal looks at Unaitas having its own mobile banking platform with increased offering in terms of various services and without any sharing mechanism in place. This will also give us an opportunity to develop more value proposition for lending as well as solutions for the Chama segment.

Services to be offered under the Mobile Banking Solution

a) Financial Transactions:

- Query services - Balance Enquiry, Mini-statement and Loan Balance, loan applications Status.
- Funds transfer- Intra account transfer, internal transfer, EFT and RTGS.
- Standing order set ups and stoppages
- Loan Application
- Service requests - cheque book request, Full Statement Request, e-statement Registration, Banker's cheque
- Airtime Top-Up to all mobile network operators
- Mobile Money services: - Bank to Customer (B2C) and Customer to Bank (C2B) services.
- Bill payment & payment Water, power, DSTV, Internet and many more

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b) Non-financial Services

- PIN Change- Change of PIN by customers themselves
- Joint account opening
- Cheque ordering and stoppage
- Account opening
- Customer registration for mobile banking and referral
- Online guarantee processing

