

Date 13th February 2025

INVITATION TO PREQUALIFY

CATEGORY: STAFF FINANCIAL LITERACY 2025-2026

Submission Deadline: 10am, 28th February 2025.

LVCT Health invites interested and qualified service providers to submit prequalification documents for staff financial wellness service provision.

1.0 Background

Founded in 2002, LVCT Health is an established Kenyan NGO and a three times recipient of the employee of the year award – inclusiveness and diversity. We are renowned for the implementation of health programs at scale in Kenya and beyond. Through our vision of Empowered Healthy Communities and mission to impact communities by facilitating universal access to equitable integrated health services, we remain a leader in designing and implementing innovative HIV prevention and treatment approaches, sexual and reproductive health and gender-based violence programs. We work with governments and other stakeholders at national and county levels to respond to the health needs of the vulnerable and most marginalized members of the society.

2.0 Guiding Note

One of the pillars of the LVCT Health HR strategy is employee wellness. Within this, our total reward package comprises of programs that promote the health and well-being of employees.

The staff financial literacy is aimed at addressing issues of employee financial health and wellness. Employees may from time-to-time experience financial stressors that impact their performance. We endeavor to provide a system within which personal and work-related challenges can be addressed in an effective and consistent manner to manage employee's total wellness and health. This acts to promote a culture of wellness within LVCT Health and provide a resource for management support in addressing performance challenges resulting from personal issues.

3.0 Objectives of the Assignment

With the above in mind, we are seeking to prequalify competent financial wellness experts with extensive experience in providing empowerment, financial literacy trainings and coaching within an organizational context. While pre-qualification shall be for the financial period 1st March 2024 to 30th September 2026, specific assignments will be awarded on need basis.

Our staff age demographics indicate an intergenerational workforce comprising of generation X, generation Y and generation Z; with the majority of staff comprising of generation Y.



Head Office Sonning Suites, Suna Rd off Ngong Rd, Adams Arcade

P. O. Box 19835-00202,KNH Nairobi • Tel: +254 20 264 6692, 263 3212/ +254 722 203 610, + 254 724 256 026
Websites: www.lvcthealth.org; www.one2onekenya.org; www.lvctgroup.co.ke; Email: enquiries@lvcthealth.org

The expert is expected to be conversant with different aspects of personal finance management and investments, in the areas of but not limited to the following:

- Personal financial adjustments in the event of loss of income;
- Managing personal finances;
- Analyzing one's financial position and living within one's means;
- Managing debt;
- Managing "black tax" and family expectations;
- Having goal-based investments and investments planning while encouraging and/or demystifying multiple revenue streams/side hustles.
- Pre-retirement planning

4.0 Approaches to the Assignment

Experts are expected to share proposals based on a relevant scope that they are most competent in. As regards to the approach to the assignment, the expert is free to propose an approach/approaches which he/she considers to work best to achieve the objectives without selling specific products and/or services and without bias towards any given service provider. This includes but is not limited to financial wellness seminars, group and team financial coaching.

5.0 Qualifications, Skills and Work Experience

- Over 8 years' experience in finance/investments industry
- Experienced Public speaker and well vast with financial wellness talks
- Knowledge of donor funded organizations and familiarity with geographical locations where LVCT Health works
- Ability to work under strict timelines and deliver ad hoc sessions while maintaining a high level of professionalism
- A track record of similar successful assignments is an added advantage

6.0 Application process

We invite interested service firms to submit

1. Technical proposal

- Clearly indicating relevant topics, methodology and estimated time of sessions for different age bands
- Brief profile of the proposed presenters and summarized personal CV, highlighting qualifications and experience.
- Summary of Major trainings or public talks facilitated by the bidder
- Contact details of the bidders' referees

2. Mandatory Documents

- Registration Certificate
- Valid tax Compliance certificate
- Firm Profile
- Resume of the proposed Speaker
- Professional License



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3. Additional information

- LVCT Health may invite the shortlisted service providers for an interview
- Bids documents must be accompanied by a signed and stamped copy of conflict-of-interest declaration form.

We invite any qualified firm with a trainer/trainers that meet the above requirements and is interested in carrying out the assignment as per this TORs to send soft copy applications to: LVCT Health Procurement, Office Email: procurementnairobi@lvcthealth.org on or before **10am, 28th February 2025**. The subject of the email application **MUST** be: **STAFF FINANCIAL LITERACY 2025-2026**.

Important Notes

- LVCT Health selection criteria requires a supplier who will accept our Purchase Order or Contract agreement.
- The proposal and supporting documents must be submitted in English.
- LVCT Health credit period is 45days
- LVCT Health is under no obligation to award the work to the lowest bidder.

LVCT Health reserves the right to accept or reject any bid in whole or in part without giving reasons for either rejection or acceptance

LVCT Health upholds safeguarding principles and is committed to engaging vendors who share our safeguarding commitment. We are committed to preventing any type of unwanted behavior at work including sexual harassment, exploitation and abuse especially of children and vulnerable adults, stigma and discrimination of individuals of various diversity, lack of integrity and financial misconduct. LVCT Health expects all staff, volunteers and suppliers to share this commitment.

We shall not tolerate any staff or contractor who commits any form of sexual harassment, abuse, or exploitation since these behaviors are acting contrary to our beliefs, values, and mission. Please visit our website www.lvcthealth.org for more information about the organization.



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A. CONFLICT OF INTEREST DECLARATION AND CODE OF CONDUCT FORM

I, of P.O.Box..... being a resident of
..... in the Republic of
do hereby make a statement as follows: -

1. THAT I am the Chief Executive/Managing Director/Principal Officer/Director of
..... (*Insert name of the Company*) who is a Bidder in respect of
RFP No. for (*insert RFP
title/description*) for..... (*insert name of the Procuring entity*) and duly authorized and
competent to make this statement.
2. THAT the aforesaid Bidder, its servants and/or agents /subcontractors will not engage in any
corrupt or fraudulent practice and has not been requested to pay any inducement to any member
of the Board, Management, Staff and/or employees and/or agents of (*Insert name of procuring
entity*)
3. THAT the aforesaid Bidder, its servants and/or agents /subcontractors have not offered any
inducement to any member of the Board, Management, Staff and/or employees
of..... (*Name of the procuring entity*)
4. THAT the aforesaid Bidder will not engage /has not engaged in any corrupt practice with other
bidders participating in the subject tender
5. THAT what is deponed to herein above is true to the best of my knowledge information and belief.

.....
(Title)

.....
(Signature)

.....
(Date)

Bidder's Official Stamp



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