

REQUEST FOR PROPOSALS

Issue Date: April 27, 2026
RFP Number: RFP_KEN/HR/1133/007
RFP Name: **Request for Application for Provision of Pension scheme for the USDA Food for Progress (FFPr) - Cooperative Agreement No. FCC-615-2025_014-00 – Kenya**

Questions due by: April 30, 2026, by 5:00 PM Eastern African Time.
Answers due by: May 4, 2026, by 5:00 PM Eastern African Time
Closing Date for Responses: May 11, 2026
Submit to: procurement.ke1133@counterpart.org
Number of anticipated awards: 1

Counterpart International (hereinafter Counterpart) is soliciting proposals for the provision of **pension scheme** as described in this Request for Proposals (RFP). These services are required under the LIFT Project under **USDA Food for Progress (FFPr) - Cooperative Agreement No. FCC-615-2025_014-00 – Kenya** (hereinafter “the Award”) by the issuing **Federal Government Agency** (hereinafter **USDA**).

Firms submitting proposals in response to this RFP (hereinafter “Offerors”) to submit offers (hereinafter “proposals”) for the services described in the attached supply schedules are under no obligation to do so. The Offeror shall bear all costs associated with the preparation and submission of its proposal.

This RFP includes the following sections:

- I. Instructions to Offerors
- II. Technical Specifications
- III. Annexes

All correspondence and/or inquiries regarding this RFP should be requested in accordance with Section I, Clause 10, Clarifications.

The Instructions to Offerors (Section I) shall not form part of the proposal or the resulting award, if any. They are merely intended to aid Offerors in the preparation of their proposals. For the purposes of interpretation of Section I, unless otherwise stated, the number of days stated herein shall be consecutive calendar days. Submission of proposals must comply with Section I, Clause 9, Submission of Proposals.

SECTION I: INSTRUCTIONS TO OFFERORS

1. Introduction

Request for Proposal (RFP) No. RFP_KEN/HR/1133/007, dated **April 27, 2026**: Counterpart hereby solicits proposals to conduct the **provision of pension scheme** as described in Section II, Scope of Work.

2. Eligibility Restrictions for Goods and Services Providers

The Pension provider must be registered and licensed to operate in Kenya

An Offeror will be considered ineligible if it or any of its principal officers has been suspended, debarred, or otherwise determined to be ineligible, as indicated on either (1) the “List of Parties Excluded from Federal Non-procurement Programs” or (2) the “Consolidated Lists of Designated Nationals”.

3. Preparation of Proposals

Offerors are expected to examine the specifications and all instructions contained in this RFP. Failure to do so shall be at the Offeror’s risk.

An Offeror’s proposal and all correspondence related to the proposal and exchanged by the Offeror and Counterpart shall be in English.

4. Proposal Content

Proposals submitted in response to this RFP must consist of the following three components:

- A. Technical proposal
- B. Cost proposal
- C. References

A. Technical proposal (10 pages maximum):

The technical proposal will be submitted as a single Microsoft Word file comprising the following documents:

- Cover letter, signed by an authorized representative of the offeror, see Section III for text.
- Technical Proposal
 - a) Organizational background showing evidence of prior performance in supplying **provision of pension scheme**;
 - b) Outline of proposed services, solutions, and team;
 - c) Plan of action and implementation timetable to address the Specific Tasks under Section II
 - d) Types of provided services/specialists;
 - e) Statement of Qualifications, referenced in Clause 7.
 - f) Subcontracting arrangements: If the execution of work to be performed by the Offeror requires the hiring of subcontractors, the proposal must clearly identify the

subcontractor(s), contact information of subcontractor(s), and the work they will perform. Counterpart will not refuse a proposal based upon the use of subcontractors; however, Counterpart retains the right to approve or reject the specific subcontractors selected.

- AI Disclosure Questionnaire in Section IV.

B. Cost Proposal:

Counterpart anticipates issuing a **service contract** as a result of this RFP. Proposals must be expressed in in Kenya Shillings.

Proposals in response to this RFP should clearly outline the fee structure applicable to the pension scheme, including all administrative, fund management, and any other applicable fees. The fee structure should be expressed as a percentage of assets under management (AUM) and/or any other applicable basis, inclusive of all taxes and statutory charges.

Offerors are required to confirm that no direct costs will be charged to the employer or staff outside the disclosed fee structure. All pricing must be presented in Kenya Shillings. Offers must remain valid for not less than Ninety (90) calendar days after the offer deadline. Offerors are requested to provide quotations on official letterhead or format.

- No advances will be given. The Offeror is responsible for financing the procurement and pricing its proposal accordingly i.e. if the firm needs to price cost of money and/or obtain a loan from a bank then it should factor in these costs into its bid.
- The Offeror shall be required to have a bank account to which payments can be made electronically or through a wire transfer.
- The Offeror may not provide Counterpart any equipment, services, or systems that use covered telecommunications equipment or services as a substantial or essential component of any system, or as critical technology as part of any system. As described in U.S. Public Law 115-232, section 889, covered telecommunications equipment is telecommunications equipment produced by Huawei Technologies Company or ZTE Corporation (or any subsidiary or affiliate of such entities) and video surveillance and telecommunications equipment produced by Hytera Communications Corporation, Hangzhou Hikvision Digital Technology Company, or Dahua Technology Company (or any subsidiary or affiliate of such entities).
- **Statement of Qualifications**
The Bidder shall include in its bid evidence in support of its technical qualifications and ability to perform the provision of pension scheme service if its bid is accepted. This shall consist of descriptions of successful prior projects of a similar nature are of key importance.
- **Professional References (1 page maximum):**
The Offeror shall submit a list of **three (3) references** in Microsoft Word or PDF format that can speak to its performance in delivering similar services to those described in Section II, Technical Specifications, **within the last five (5) years**. This

list must include the name, title, organization, e-mail address, and telephone number of a contact from each reference that is available for Counterpart to reach. Also include a brief description of the services and contract value should be provided. Counterpart will not accept certified copies of letters of recommendation.

5. Format and Signing of Proposal

The Offeror shall prepare one proposal in its three parts – technical proposal, cost proposal, and references – with all the required sections and information as listed above under Clause 4, Proposal Content. The proposal shall be signed by a person duly authorized to bind the Offeror. See Section III- Annexes for the template for the Cover Letter.

6. Proposal Validity Period

Proposals must remain valid for no less than 90 days after the proposal deadline listed on the cover page.

7. Questions

Questions regarding the administrative and technical requirements of this RFP must be submitted in writing no later than the questions deadline indicated on the cover page to procurement.ke1133@counterpart.org with the subject line “Clarifications for RFP No. RFP_KEN/HR/1133/007” The questions and answers will also be published wherever the RFP is initially published or will be circulated to all RFP recipients who have indicated an interest in bidding.

Only the written answers will be considered official and carry weight in the RFP process and subsequent evaluation. Any verbal information received from a Counterpart or LIFT Project employee or other entity should not be considered as an official response to any questions regarding this RFP.

Offerors must only communicate with Counterpart regarding this RFP through the designated email address listed above. Reaching out to Counterpart staff by any other method to ask questions or discuss the RFP is strictly prohibited. Such unauthorized contact will be considered a violation of Counterpart’s procurement ethics and may lead to the bidder’s disqualification.

8. Amendment of Bidding Documents

Counterpart may at its discretion, for any reason, whether at its own initiative or in response to a request for clarification by an Offeror, modify the bidding documents (proposal contents detailed in Section I) by amendment. All prospective Offerors that have received bidding documents will be notified of the amendment by e-mail and such amendments will be binding. Counterpart will also publicly publish any amendment wherever the RFP is initially published.

9. Submission of Proposals

Proposals must be submitted electronically in the formats indicated in Clause 4, Proposal Content, to procurement.ke1133@counterpart.org with the subject line “Proposal for RFP No. RFP_KEN/HR/1133/007 – [Offeror’s name]”. Counterpart will not accept hard-copy proposals under any circumstances.

Ensuring successful transmission and receipt of its proposal is the sole responsibility of the Offeror. It is recommended that no e-mail exceeds 10 MB in size, inclusive of attachments.

10. Deadline and Late Proposals

Offers must be received by e-mail no later than date and time indicated on page 1 of this RFP. It is the Offeror's sole responsibility to ensure its proposal is received by Counterpart on or before the proposal deadline. Any late proposals will be considered only at the sole discretion of Counterpart.

Offerors will be held responsible for ensuring that their proposals are received in accordance with the instructions stated herein.

Counterpart reserves the right to make no award if it is determined that the offers submitted do not satisfy the needs of the organization.

11. Modification of Proposals

Any Offeror has the right to withdraw, modify, or correct its proposal after it has been delivered to Counterpart, provided the request for such a withdrawal, modification, or correction is received by Counterpart at the email address given above before the proposal deadline. Counterpart may ask any Offeror for clarification of its proposal; nevertheless, no Offeror will be permitted to alter its proposal price at its own request or make any other material modification after the proposal deadline unless the RFP has been amended or the deadline extended.

12. Criteria for Award and Evaluation

The award will be made to a responsible offeror whose offer follows the RFP instructions, meets the eligibility requirements, and is determined via a trade-off analysis to be the best value based on application of the following evaluation criteria.

Offerors will be evaluated based on their ability to respond to the methodology, core services, and specific tasks.

Within the technical response, Offerors should include information which will allow Counterpart to adequately assess the following:

Stage 1: Mandatory Eligibility Requirements (Pass/Fail): At this stage, the quotations will be subjected to a preliminary review to verify the overall completeness and responsiveness of the quotations as received. Any quotations that will be found to be incomplete, invalid, or substantially unresponsive will be eliminated at this stage. To qualify for technical evaluation, a vendor **must** meet the following **Mandatory Eligibility Requirements**:

- Must have completed the vendor information form/ offer letter as provided (Annex 1), and attached supporting documents as required.
- Must have completed the Pension Scheme proposal summary structure provided.

- Be registered with the (RBA) Pension Regulatory Authority (Commissioner of Insurance. Attach a copy of the current & valid RBA license/certificate
- Submit a summary of Audited financial statements for the last two years. (Not more than 5 pages)
- Must submit copies of the following documents:
 - Valid Certificate of Incorporation.
 - PIN Certificate.
 - Valid Tax Compliance Certificate.
 - Company Profile (Not more than 5 pages).
 - List of re-insurers
 - A list of 5 (five) reputable clients and total premiums per client for the last two years.
- Must provide proof of membership of the Retirement Benefits Schemes (RBS).
- Proof of licensing as: Pension Administrator / Fund Manager / Custodian (as applicable)

Nb: Only bidders who qualify in the above Mandatory Eligibility Requirements will qualify for technical evaluation.

Stage 2: Technical Evaluation (80 points)

The total technical points assigned to each offer will be determined by adding the scores assigned by the evaluation committee to the technical features of the offer in accordance with the criteria below. Offers will be evaluated using the criteria below and bids that score less than 64 out of 80 shall be treated as non-responsive and will not be evaluated further.

Criterion	Sub-Criteria	Max Points
1. Experience & Track Record	<ul style="list-style-type: none"> - Firm's years of experience in pension fund administration (5+ years = full marks) (5 pts) - Demonstrated experience managing pension schemes of similar size/complexity, preferably NGO/donor-funded (10 pts) - Quality and relevance of the clients provided (5 pts) 	20
2. Regulatory Compliance & Governance	<ul style="list-style-type: none"> - Governance framework including trustee support, advisory services, and reporting lines (5 pts) - Risk management systems and internal controls (5 pts) - Compliance history (no major sanctions/litigation) (5 pts) 	15
3. Team Capacity & Qualifications	<ul style="list-style-type: none"> - Qualifications and experience of key personnel assigned to the account (5 pts) - Dedicated account management structure and availability (5 pts) - Adequacy of staffing levels and technical expertise (5 pts) 	15

4. Investment Strategy & Fund Performance	<ul style="list-style-type: none"> - Historical fund performance (3–5 years) compared to benchmarks (5 pts) - Clarity and robustness of investment strategy and asset allocation approach (5 pts) - Description of risk management practices (e.g., diversification, portfolio limits, compliance with RBA guidelines) (3 pts) - Transparency and frequency of performance reporting (2 pts) 	15
5. Service Delivery, Administration & Technology	<ul style="list-style-type: none"> - Efficiency in contribution processing and benefit payments (3 pts) - Member services (statements, helpdesk, onboarding, education) (2 pts) - Turnaround time for benefit processing and queries (5 pts) - Availability and functionality of digital platforms/portals (3 pts) - Reporting capabilities and data security measures (2 pts) 	15
Total		80

Only bidders who score at least 80% (64 points) in technical evaluation will qualify for financial evaluation. The award will be based on Trade - Off among technically qualified bidders.

Stage 3: Cost Proposal Evaluation 20 points

Fee Structure:

- Administration fees
- Fund management fees
- Custodian fees
- Any additional/hidden charges

Cost Competitiveness:

- Overall value for money
- Cost transparency

Award will be made on a best-value basis, considering both technical and financial factors. Only technically qualified proposals (minimum technical score of 64) will be evaluated for cost. Financial proposals will be scored using the following formula:

$$\frac{\text{(Lowest Evaluated Price} \div \text{Offeror's Price)}}{\text{(Maximum Cost Points = 20)}} \times 20$$

Stage 4: Combined Technical and Cost Score

The total evaluation score will be calculated as follows:

Total Technical Score (maximum 80 points) + Total Cost Score (maximum 20 points) = Total Evaluation Score

Example: 80 (technical score) + 20 (cost score) = 100

Please note that if there are significant deficiencies regarding responsiveness to the requirements of this RFQ, an offer may be deemed “non-responsive” and thereby disqualified from consideration. Counterpart reserves the right to waive immaterial deficiencies at its discretion.

Best-offer quotations are requested. It is anticipated that award(s) will be made solely on the basis of these original quotations. However, Counterpart reserves the right to conduct any of the following:

- Counterpart will reject any proposal that is nonresponsive. Further, Counterpart reserves the right to reject the proposal of any Offeror if, in Counterpart’s judgment, the Offeror is not fully qualified to provide the services, or to reject all proposals altogether.
 - Counterpart may conduct negotiations with and/or request clarifications from any offeror prior to award.
 - While preference will be given to offerors who can address the full technical requirements of this RFP, Counterpart may issue a partial award or split the award among various Offers, if in the best interest of the LIFT Project.
 - Any successful Offeror must be determined to be responsible. A responsible Offeror is one who has technical expertise, management capability, workload capacity, and financial resources to perform the work, and meets the eligibility requirements.
 - Counterpart may cancel this RFP at any time.
 - Counterpart may reject any and all offers, if such action is considered to be in the best interest of Counterpart.

Please note that in submitting a response to this RFP, the offeror understands that USDA is not a party to this solicitation and the offeror agrees that any protest hereunder must be presented—in writing with full explanations—to the LIFT Project for consideration, as USDA will not consider protests regarding procurements carried out by implementing partners. Counterpart, at its sole discretion, will make a final decision on the protest for this procurement.

Shortlisted applicants may be invited for an interview or presentation with Counterpart as part of the evaluation process.

13. Acceptable Proposals

For a proposal to be deemed acceptable, it must comply with all the terms and conditions of this RFP without material modification. In addition, the successful Offeror must be determined to be eligible and responsible. A responsible offeror is one who has technical expertise, management capability, workload capacity, and financial resources to perform the work proposed.

14. Negotiations

Best offer proposals are requested. It is anticipated that awards will be made solely on the basis of these original proposals. However, Counterpart reserves the right to conduct negotiations and/or

request clarifications prior to awarding a contract. Counterpart reserves the right to make multiple awards, if it is in the best interest of LIFT Project.

15. Notification of Award

Before the expiration of the period of proposal validity, Counterpart will notify the successful Offeror in writing that its proposal has been accepted.

16. Terms and Conditions

This is a Request for Proposals only. Issuance of this RFP does not in any way obligate Counterpart, the LIFT Project, or USDA to make an award or pay for costs incurred by potential offerors in the preparation and submission of an offer.

This solicitation is subject to Counterpart's standard terms and conditions. Any resultant award will be governed by these terms and conditions; a copy of the full terms and conditions is available upon request. Please note the following terms and conditions will apply:

- (a) Counterpart's standard payment terms are net 30 days after receipt and acceptance of any commodities or deliverables. Payment for ordering documents issued under any BPA resulting from this RFP will only be issued to the entity submitting the offer in response to this RFP and identified in the corresponding BPA award; payment will not be issued to a third party.
- (b) No commodities or services may be supplied that are manufactured or assembled in, shipped from, transported through, or otherwise involving any of the following countries: Burma (Myanmar), Cuba, Iran, North Korea, (North) Sudan, Syria.
- (c) Any international air or ocean transportation or shipping carried out under any award resulting from this RFP must take place on U.S.-flag carriers/vessels.
- (d) United States law prohibits transactions with, and the provision of resources and support to, individuals and organizations associated with terrorism. The Offeror under any award resulting from this RFP must ensure compliance with these laws.
- (e) The title to any goods supplied under any award resulting from this RFP shall pass to Counterpart following delivery and acceptance of the goods by Counterpart. Risks of loss, injury, or destruction of the goods shall be borne by the offeror until title passes to Counterpart.

17. Acceptance of Privacy Policy, Data Protection, AI Usage and Terms & Conditions

By submitting a quotation/proposal to Counterpart, the company or the individual consents to Counterpart's privacy policy terms and conditions (<https://www.counterpart.org/terms-and-conditions/>) and provides Counterpart permission to process the company's or individual's personal data specifically for the performance of, and purposes identified in, this solicitation document and in compliance with Counterpart's legal obligations under applicable United States and European Union laws, data protection regulations, and any other applicable legal requirements.

The company/individual may withdraw their consent at any time by contacting privacy@counterpart.org If consent is withdrawn, Counterpart reserves the right to accept or reject the offer.

Counterpart must approve any AI used as part of the services or deliverables.

18. Ethical Business Practices

Counterpart International commits to transparency and integrity in its business processes. Counterpart International hereby requests any Offeror to (i) inform Counterpart International upon becoming aware that the integrity of Counterpart International's business has been compromised during the duration of this RFP, and (ii) report such events by notifying Counterpart International using its confidential email address: whistleblower@counterpart.org, Ethicspoint, which can be accessed at <http://counterpart.ethicspoint.com>. Reports can be made in multiple languages. Counterpart International will not tolerate any form of retaliation against any person who makes a report in good faith.

SECTION II: SCOPE OF WORK

A. Introduction and Background of the Activity or Program

Counterpart International (Counterpart) is soliciting proposals for the supply of Pension Scheme Service for the five-year United States Department of Agriculture's (USDA) Food for Progress (FFPr) Livestock Innovation and Feed Transformation (LIFT) project in Kenya that has an anticipated operational budget of \$18 million. The LIFT project aims to expand international trade in agricultural products and increase agricultural productivity through improved feed quality and affordability. Offerors should put forward their qualifications and price quote to support COUNTERPART in Pension Scheme Service. As a result of this RFP, COUNTERPART anticipates issuing a Service Contract.

B.1 A description of the supplies or services to be subcontracted or procured.

Counterpart International (CPI) seeks to engage a qualified and licensed Pension Services Provider to establish and administer a staff retirement benefits scheme for employees under the LIFT Project in Kenya. This procurement is necessary to ensure compliance with Kenyan statutory requirements and to provide a competitive, market-aligned employee benefits package that supports staff financial security and retention. The selected provider will deliver a compliant, transparent, and efficiently managed pension scheme in accordance with the regulations of the Retirement Benefits Authority and applicable Kenyan laws.

C. Scope of Work

The selected Pension Services Provider will be responsible for the design, implementation, administration, and ongoing management of CPI's staff pension scheme. The Scope of Work includes, but is not limited to, the following:

1. Scheme Design and Setup

- Design a pension scheme tailored to CPI's structure and staffing, including defined contribution framework and contribution structure.
- Facilitate scheme registration and approval with the Retirement Benefits Authority (RBA).
- Develop scheme rules, trust deed, and governance structures in compliance with Kenyan regulations.
- Advise CPI on optimal scheme structure, including tax efficiency and compliance considerations.

2. Fund Administration

- Maintain accurate and up-to-date member records, including contributions, balances, and beneficiary details.
- Process monthly contributions and reconcile employer and employee contributions.
- Issue periodic (at least quarterly) member statements detailing contributions and fund performance.
- Provide secure online access for CPI and scheme members to view account information.

3. Investment Fund Management Options

- Provide a range of investment fund options with varying risk-return profiles (e.g., conservative, balanced, growth).

- Clearly present historical performance data and benchmarks for each fund option.
 - Implement robust risk management practices, including diversification and compliance with RBA guidelines.
 - Support members in selecting appropriate investment options through advisory and education.
4. Regulatory Compliance and Reporting
- Ensure full compliance with all RBA regulations, tax laws, and statutory requirements.
 - Prepare and submit all required statutory filings and reports to regulatory authorities.
 - Advise CPI on any regulatory changes affecting pension administration and compliance.
 - Maintain proper documentation for audit and compliance purposes.
5. Reporting and Performance Monitoring
- Provide CPI with periodic (at least quarterly) reports on:
 - Scheme performance
 - Contribution summaries
 - Fund allocation and returns
 - Administrative updates
 - Participate in periodic review meetings with CPI to assess fund performance and scheme effectiveness.
6. Member Services and Support
- Conduct onboarding and sensitization sessions for staff on pension scheme benefits and operations.
 - Provide ongoing customer support to scheme members, including handling queries and requests.
 - Offer financial literacy support related to retirement planning where applicable.
7. Benefits Processing and Exit Management
- Process withdrawals, transfers, and retirement benefits in a timely and compliant manner.
 - Ensure accurate calculation and disbursement of benefits in accordance with scheme rules.
 - Facilitate transfer of benefits for exiting staff to other schemes where applicable.
8. Deliverables and Timelines
- Scheme registration and operationalization within an agreed timeline (to be proposed by the bidder).
 - Monthly contribution processing and reconciliation reports.
 - Quarterly performance and compliance reports.
 - Annual audited scheme reports (where applicable).
9. Service Delivery Requirements
- The provider must be duly licensed and registered in Kenya to offer pension administration services.
 - The provider must demonstrate capacity to manage schemes of similar size and complexity.
 - The provider must ensure data security, confidentiality, and integrity of member information.
 - The provider must assign a dedicated relationship manager/account team for CPI.

C.2 Specifications

The table below contains the technical requirements of the services. Offerors are requested to provide quotations containing the information below on official letterhead or official quotation format. In the event this is not possible, offerors may complete this Section 3 and submit a signed/stamped version to Counterpart.

Requirements	
Regulatory Compliance	<ul style="list-style-type: none"> • Valid licensing and registration with Retirement Benefits Authority (RBA) • Copies of licenses (Administrator / Fund Manager / Custodian as applicable) • Compliance with all applicable Kenyan pension laws and regulations • Adherence to data protection requirements
Scheme Structure & Design	<ul style="list-style-type: none"> • Proposed pension scheme type (e.g., Defined Contribution Scheme) • Flexibility in contribution structure (employer vs employee contributions) • Vesting rules and benefit structure • Portability of benefits for employees
Investment Management	<ul style="list-style-type: none"> • Proposed investment strategy and asset allocation • Available fund options (e.g., conservative, balanced, growth funds) • Historical performance (3–5 years) • Risk management approach • ESG (Environmental, Social, Governance) considerations (if applicable)
Member Services	<ul style="list-style-type: none"> • Member registration process • Access to member statements (frequency and format) • Online/member portal availability • Financial literacy training for staff • Helpdesk support
Reporting Requirements	<ul style="list-style-type: none"> • Frequency of reporting (monthly, quarterly, annual) • Types of reports provided: <ul style="list-style-type: none"> • Contribution reports • Fund performance reports • Compliance reports • Custom reporting capability
Technology & Systems	<ul style="list-style-type: none"> • Availability of digital platforms/portals • System integration capability (e.g., payroll systems) • Data security measures and backup systems • User access controls
Fees & Cost Structure	<ul style="list-style-type: none"> • Administration fees • Fund management fees

	<ul style="list-style-type: none"> • Custodian fees • Any additional or hidden charges • Fee structure transparency
Experience & References	<ul style="list-style-type: none"> • Years of experience in pension management • Experience with organizations of similar size/sector (NGO/donor-funded preferred) • At least five (5) client references
Transition & Implementation Plan	<ul style="list-style-type: none"> • Proposed onboarding timeline • Data migration process (if applicable) • Staff onboarding and sensitization plan • Risk mitigation during transition
Governance & Risk Management	<ul style="list-style-type: none"> • Internal controls and compliance systems • Trustee support services • Audit processes • Conflict of interest management
Value-Added Services (Optional)	

D. Deliverables

#	Deliverable	Description	Frequency / Timeline	Responsible Party	Output / Evidence
1	Scheme Design & Documentation	Development of pension scheme structure, Trust Deed, Rules, and governance framework compliant with Retirement Benefits Authority requirements	Within 30–45 days of contract signing	Pension Provider	Approved Trust Deed, Scheme Rules, Registration Documents
2	Scheme Registration	Facilitation of registration and approval with the Retirement Benefits Authority (RBA)	Within 45–60 days of contract signing	Pension Provider	RBA Registration Certificate / Approval Letter
3	Staff Onboarding & Sensitization	Conduct onboarding sessions to educate staff on	Within 2 weeks of scheme approval	Pension Provider	Training materials, Attendance records, Presentation slides

#	Deliverable	Description	Frequency / Timeline	Responsible Party	Output / Evidence
		scheme structure, benefits, and investment options			
4	Member Account Setup	Creation and activation of individual member accounts	Within 5–10 working days after onboarding	Pension Provider	Member account records, System access confirmation
5	Monthly Contribution Processing	Collection, reconciliation, and allocation of employer and employee contributions	Monthly (within 5–10 days after receipt of payroll data)	Pension Provider	Contribution reports, Reconciliation statements
6	Member Statements	Issuance of detailed statements showing contributions, balances, and returns	Quarterly (or as agreed)	Pension Provider	Individual member statements
7	Investment Performance Reports	Reporting on fund performance, asset allocation, and benchmark comparisons	Quarterly	Pension Provider	Performance reports, Fund summaries
8	Compliance & Statutory Reporting	Preparation and submission of all required statutory reports to RBA and relevant authorities	As required (quarterly/annually)	Pension Provider	Filed statutory reports, Compliance confirmations
9	Scheme Review Meetings	Review of scheme performance and administration with CPI management	Quarterly	Pension Provider & CPI	Meeting minutes, Action trackers
10	Annual Scheme Report	Comprehensive annual report including audited financials (if applicable),	Annually	Pension Provider	Annual report, Audit reports

#	Deliverable	Description	Frequency / Timeline	Responsible Party	Output / Evidence
		performance, and compliance status			
11	Member Support Services	Ongoing support to members including inquiries, benefit projections, and advisory	Continuous	Pension Provider	Helpdesk logs, Service reports
12	Benefits Processing	Processing of exits, withdrawals, transfers, and retirement benefits	Within 10–15 working days of request (or per SLA)	Pension Provider	Payment confirmations, Benefit calculation statements
13	Data Management & System Access	Provision of secure system access for CPI and members for real-time data and reporting	Continuous	Pension Provider	System access credentials, User reports
14	Dedicated Account Management	Assignment of a relationship manager for coordination and service delivery	Throughout contract period	Pension Provider	Account management structure, Contact details

E. Reports:

The Pension Services Provider shall prepare and submit the following reports to Counterpart International (CPI) in a timely, accurate, and compliant manner:

1. Contribution & Reconciliation Reports

- Monthly reports detailing:
 - Employer and employee contributions received
 - Allocation to individual member accounts
 - Reconciliation between payroll data and contributions received
- **Timeline:** Within 5–10 working days after contribution processing

2. Member Statements

- Individual statements showing:
 - Opening balance
 - Contributions (employee & employer)

- Investment returns
- Fees/charges (if any)
- Closing balance
- **Frequency:** Quarterly (or as agreed)

3. Investment Performance Reports

- Detailed fund performance reports including:
 - Returns by fund option
 - Benchmark comparisons
 - Asset allocation breakdown
 - Commentary on market performance and outlook
- **Frequency:** Quarterly

4. Compliance & Statutory Reports

- Submission of all required reports to the Retirement Benefits Authority and other relevant authorities
- Copies of submitted reports to be shared with CPI
- Immediate notification of any compliance issues or regulatory changes
- **Frequency:** As required (quarterly/annually)

5. Scheme Performance & Management Reports

- Consolidated report to CPI including:
 - Overall scheme performance
 - Total contributions and fund value
 - Administrative updates
 - Key risks and mitigation actions
- **Frequency:** Quarterly

6. Annual Reports

- Comprehensive annual report including:
 - Scheme performance summary
 - Audited financial statements (where applicable)
 - Compliance status
- **Frequency:** Annually

7. Ad Hoc Reports

- Provide additional reports as reasonably requested by CPI, including:
 - Benefit projections
 - Staff-specific summaries
 - Audit support documentation
- **Timeline:** Within agreed timelines

G. Period of Performance

The period of performance for all activities requested under this scope of work is for 2 years. On or about May 2026 – April 2028

SECTION III: CHECKLIST and COVER LETTER TEMPLATE

To assist offerors in preparation of proposals, the following checklist summarizes the documentation to include an offer in response to this RFP:

- Cover letter, signed by an authorized representative of the offeror (see template below)
- Official proposal and budget
- Copy of offeror’s registration or business license
- AI Disclosure Form

Offer Cover Letter Template

The following cover letter must be placed on letterhead and completed/signed/stamped by a representative authorized to sign on behalf of the Offeror:

To: [enter project name]
 [enter address of Counterpart's office]

Reference: RFP no. [enter RFP#]

To Whom It May Concern:

We, the undersigned, hereby provide the attached offer to perform all work required to complete the activities and requirements as described in the above-referenced RFP. Please find our offer attached.

We hereby acknowledge and agree to all terms, conditions, special provisions, and instructions included in the above-referenced RFP. We further certify that the below-named firm—as well as the firm’s principal officers and all commodities and services offered in response to this RFP—are eligible to participate in this procurement under the terms of this solicitation and under USDA regulations.

Furthermore, we hereby certify that, to the best of our knowledge and belief:

- We have no close, familial, or financial relationships with any Counterpart or LIFT project staff members;
- We have no close, familial, or financial relationships with any other offerors submitting proposals in response to the above-referenced RFP; and
- The prices in our offer have been arrived at independently, without any consultation, communication, or agreement with any other offeror or competitor for the purpose of restricting competition.

We hereby certify that the enclosed representations, certifications, and other statements are accurate, current, and complete.

Authorized Signature:
Full Name of Signatory:
Title:

Date: _____

Company Name: .

Company Address:

Company Telephone:

Website:

Company Registration or Taxpayer ID Number:

Does the company have an active bank account (Yes/No)?

Official name associated with bank account (for payment):

Section IV: AI Disclosure Questionnaire

The AI Disclosure questionnaire is used to disclose whether and how artificial intelligence (AI) tools or systems will be used in connection with the services provided, and to ensure appropriate protections for Counterpart’s data, confidentiality, intellectual property, and security. Counterpart Head of IT Department in the US Office must approve any AI Used as Part of the Services or Deliverables, and a signed version will be incorporated into any contract made with Counterpart.

Instructions (Disclosure of AI Use)

1. Check one category below and briefly describe any AI use (tool + purpose) (Examples of commercial tools include Microsoft Copilot, ChatGPT, Claude, Gemini, Perplexity, Grammarly, DeepL, Midjourney, DALL·E). If none, select Category 3 and write “No AI will be used.”
2. If AI is used, state what Counterpart/client/PII/confidential data (if any) will be entered and where it is processed/stored (and retention, if applicable).
3. Confirm: no training/commingling of Counterpart data; you remain responsible for deliverables (human review); and you will notify Counterpart and get approval before any change in AI use.

A. Category Selection (check one)

- Category 1 – AI Used as Part of the Services or Deliverables
- Category 2 – Incidental Use of Commercial AI Tools Only
- Category 3- No use of AI as part of the Services or Deliverables

B. Provide more information based on the category you selected.

1. Category 1 – AI Used as Part of the Services or Deliverables

Applies when AI is part of the services or deliverables and/or processes Counterpart or client data. Requires approval by Counterpart Head of IT Department in the US Office.

Category 1 – Required Information (complete all):

AI tool/system name(s): _____

AI provider(s): _____

Purpose / use case: _____

Data involved (check all): Company Client/Donor PII Other: _____

Data processing/storage location: _____

Data retention period: _____

AI training using Company data? No Yes

Is this a paid version of the commercial tool? No Yes

2. Category 2 – Incidental Use of Commercial AI Tools Only

Applies only to limited productivity use and not to deliverables.

Category 2 – Required Confirmations

I confirm that:

- No Counterpart, client, donor, or confidential data is entered
- AI outputs are reviewed and verified by me
- AI does not produce deliverables or decisions
- AI is not trained using Counterpart’s information

AI tools used (if any):

Description of incidental use:

Is this a paid version of a commercial tool? No Yes

General Reminders

Approval is required before AI in Category is used. Inaccurate or incomplete disclosure may result in delayed approval, non-payment, suspension of AI use, or contract termination.

Offeror’s Signature Signed by Authorized Representative

Name: _____ Date: _____

Position:

Signature: _____