

Project/Activity Name:	PROFESSIONAL NOTE TAKER-ENGLISH
Agresso Work Order:	
Country:	KENYA

REQUEST FOR PROPOSAL PROFESSIONAL NOTE TAKING SERVICES (SHORT TERM)

RFP Release Date:	16th September 2025 10 th October 2025
Proposal Submission Deadline:	6th October 2025 21 th October 2025
Question/ Inquiry Submission Deadline:	1st October 2025
Electronic submission to the attention of:	Procurement Kenya
Electronic submission:	procurement-ke@heifer.org
Contact information for inquiries about this RFP:	procurement-ke@heifer.org
Performance Period:	Tentative date of 17 th to 21 st November 2025

1. INTRODUCTION

Heifer International is a global development organization on a mission to end hunger and poverty in a sustainable way. Working with farmers and their communities to identify and invest in business opportunities that deliver living incomes. Since launching in 1944, Heifer International has assisted more than 40 million families to build sustainable food and farming businesses that strengthen rural economies and put people on a pathway to Sustainable Living Income. We work with local farmers and food producers because we believe ending poverty begins with agriculture.

2. BACKGROUND

Heifer International will be holding a virtual global finance conference during the month of November 2025 with a variety of participants from its country, global and regional offices.

3. OBJECTIVE

The purpose of this consultancy is to provide targeted services as professional notetaker in English language. The tentative date of the meeting is from 17th to 21st November 2025 with two blocks of fourhour sessions. There will be the possibility of break out rooms during the conference and there maybe need to have the notetakers captures minutes in the breakout rooms as well.

4. SCOPE OF WORK

The targeted consultancy services will be to provide professional note taking services in English for the Finance conference. The consultant will also provide the notetaking in the various breakout rooms during the conference. The scope of work for professional notetaking includes providing clear, comprehensive, and accurate records of meetings, conversations, and discussions with a focus on identifying key information, decisions, and action items. Professionals will also adhere to specific constraints such as work-appropriate tools, time limitations, and Heifer International data protection policies while ensuring notes are actionable, easily shareable for collaboration, and serve as a basis for future tasks and projects.

5. EXPECTED DELIVERABLES

- **Action-Oriented Notes:** Notes that are focused on summarizing key takeaways and identifying concrete action items for future reference and task management.
- **Comprehensive Records:** Complete and well-organized documents that provide a full account of conversations or lectures.
- **Shareable Documents:** Notes that are formatted and organized for easy sharing among team members, facilitating collaboration and feedback.
- **Meeting Summaries:** Concise summaries of discussions that highlight key decisions, identified issues, and agreed-upon next steps.

6. KEY CONSIDERATIONS

- **Accuracy and Clarity:** Ensure all notes are accurate, clear, and easy to understand for anyone reviewing them.
- **Timeliness:** Capture information promptly, especially during meetings or lectures, to maintain a high level of detail and context.
- **Professional Tools:** Use professional and work-appropriate supplies and tools, such as laptops and specific software, for notetaking.
- **Company Policy:** Be aware of and adhere to any company restrictions on apps, software, or data usage when taking notes.
- **Purpose of Notes:** Differentiate from academic notes by focusing on actionable goals and tasks relevant to the professional environment.

7. REPORTING AND COMMUNICATION

The focal point for short term consultant for the professional note taking services will be the Senior Manager for Award Readiness and Compliance

8. EVALUATION CRITERIA

The selection committee will evaluate all proposals based on the following criteria. Firms and qualified individuals are encouraged to provide detailed and specific responses in alignment with these criteria.

Application Evaluation Focus	Percentage
Accuracy and relevance of the proposed technical approach and methodology	30%
Proposed team expertise and competencies to address project components	60%
Budget justification and cost realism	10%
Total	100%

9. APPLICATION REQUIREMENTS

Only legally registered consultancy firms and/or qualified individuals are ELIGIBLE to apply and should submit the following documents upon application:

- a) Letter of expression of interest and demonstration of capability
- b) A technical proposal detailing your understanding and how you propose to undertake the assignment with general information approach as below.
 - i. **Capacity Statement:** The technical capacity statement, including past experiences and activities related to the assignment.
 - ii. Organization and/or individual overview highlighting related assignments completed.
 - iii. The capacity and portfolio of the lead consultant, detailed profile of the lead consultant, including their qualifications, experience, and expertise relevant to the assignment.
 - iv. At least three references from other clients for which similar assignments
 - v. **Financial proposal** –Applicants should submit a detailed budget in Excel format in **KES & USD**
 - vi. The bidding consultancy firm and/or individual **MUST** attach the following documents (where applicable) with their bid or proposal to Heifer International Kenya • Certificate of Incorporation or Business Registration Certificate.
 - Valid CR12 Certificate.
 - KRA online PIN Certificate.
 - Valid Tax Compliance Certificate.
 - Trade reference and clientele list including their respective contacts.

Failure to submit any of the required documents may result in the disqualification of the application.

10. APPLICATION PROCEDURE

The proposal (duly signed) should comprise a letter of expression of interest quoting the consultancy fee. Applications will be accepted preferably in soft copy through email and mentioning the subject line; “**SHORT-TERM PROFESSIONAL NOTE TAKING SERVICES**” to procurement-ke@heifer.org on or **before 6th October 2025**.

11. LATE SUBMISSIONS AND MODIFICATIONS

Proposals received after the submission deadline will not be considered. Applicants are responsible for ensuring their proposals are submitted according to the instructions stated herein. Heifer retains the right to terminate this RFP or modify the requirements upon notification to the applicants.

12. VALIDITY OF PROPOSALS

Proposals submitted shall remain open for acceptance for Twenty-One (21) days from the last date specified for receipt of the proposal. This includes, but is not limited to pricing, terms and conditions, service levels, and all other information. If your organization is selected, all information in this document and the negotiation process is contractually binding.

13. LIMITATIONS

This Request for Proposal does not represent a commitment to award a contract, to pay any costs incurred in the preparation of a response to this RFP, or to procure or to contract for services or supplies. Heifer reserves the right to fund any or none of the applications submitted and reserves the right to accept or reject in its entirety and absolute discretion any proposal received because of the RFP.

14. INTELLECTUAL PROPERTY

Section 1. Ownership Generally. Subject to Section 2 below, any intellectual property (including but not limited to copyrights, trademarks, service marks, and patents), intellectual property rights, deliverables, manuals, works, ideas, discoveries, inventions, products, writings, photographs, videos, drawings, lists, data, strategies, materials, processes, procedures, systems, programs, devices, operations, or information developed in whole or in part by or on behalf of Contractor or its employees or agents in connection with the Services and/or Goods (collectively, the "Work Product") shall be the exclusive property of HPI. Upon request, the Contractor shall sign all documents and take all actions necessary to confirm or perfect HPI's exclusive ownership of the Work Product.

Section 2. Prior-Owned Intellectual Property. Any intellectual property owned by a Party before the Effective Date ("Prior-Owned IP") shall remain that Party's sole and exclusive property. Regarding any of Contractor's Prior-Owned IP included in the Work Product, Contractor shall retain ownership, and hereby grants HPI a permanent, non-exclusive, royalty-free, worldwide, irrevocable right and license to use, copy, reproduce, publicly display, edit, revise, perform, and distribute said intellectual property, in any format or any medium, as part of the Work Product.

Section 3. Work Made for Hire. To the extent copyright laws apply to the Work Product, the Parties agree that (a) HPI specially ordered or commissioned the Work Product, (b) the Work Product is a "work made for hire" under United States copyright laws, and (c) HPI shall be deemed the author

thereof and shall own all right, title, and interest therein. To the extent such rights, in whole or in part, do not vest in HPI as a "work made for hire", Contractor hereby irrevocably grants, assigns, and transfers to HPI, exclusively and in perpetuity, all of the Contractor's rights of any kind or nature, now known or hereafter devised, in, too, and in connection with the Work Product, and HPI shall solely and exclusively own any rights therein, and in the elements thereof, including but not limited to any allied, ancillary, subsidiary, incidental, and adaptation rights. The contractor hereby waives all rights known as "moral rights", and any similar rights, which Contractor may have in connection with the Work Product. The description of Services and/or Goods provided in this Agreement shall in no way limit the way HPI may use the Work Product.

15. DIVERSITY AND INCLUSION

Heifer International values diversity, equity, inclusion and belonging ("DEIB"), and believe that effectively accessing and managing diverse talent leads to improved outcomes. HPI takes a broad view of diversity, and inclusive of varied backgrounds including, but not limited to, age, experience, race, ethnicity, sexual orientation, gender, gender identity, disability status, national origin, and culture. HPI expect third-party providers to respect and reflect HPI's value of DEIB. HPI's ongoing monitoring of third-party service providers incorporates an assessment of vendors' commitment to, adherence with, and track record of accessing and retaining diverse and inclusive workforces.