

## CALL FOR PROPOSALS

### CORPORATE SOCIAL RESPONSIBILITY

***'WEZESHA MJANE'***

**REF NO: UFAA/ CSR/2026/1**

**Name:** Unclaimed Financial Assets Authority  
**Telephone:** 020 4023000  
**Mobile:** +254-0706 866984  
**Email:** [cse@ufaa.go.ke](mailto:cse@ufaa.go.ke)  
**Address:** P. O Box 28235-00200, Nairobi, Kenya  
Pacis Centre, 2nd floor, slip road, Off Waiyaki way  
Westlands, Nairobi  
**Website:** [www.ufaa.go.ke](http://www.ufaa.go.ke)

### INTRODUCTION

The Unclaimed Financial Assets Authority (UFAA) is a State Corporation established under the National Treasury pursuant to the Unclaimed Financial Assets (UFA) Act No. 40 of 2011, with the primary mandate of obtaining unclaimed financial assets from their holders, safeguarding, and reuniting them with their rightful owners.

### PROJECT DETAILS

The Unclaimed Financial Assets Authority (UFAA) is inviting funding proposals for projects by Non-Governmental Organisations (NGOs)/Foundations/Self-help groups/Community-Based Organisations that have been in operation for over three (3) years and work with and benefit widows or widow-led households in Kenya.

Two projects will be funded during this cycle.

UFAA is inviting applicants to submit project proposals indicating what the organisations do, their project idea and how the proposed project will benefit widows and the host community. In addition, the winning project will be awarded a scholarship for a child from a needy, widow-led household benefiting from the proposed project\*. The scholarship will only cater to the secondary education of the child.

In addition to the above, successful applicants should:

- a) Be legally and locally registered with relevant authorities and demonstrate good governance and accountable leadership.
- b) Demonstrate a good understanding of the local context and needs.
- c) Demonstrate that the proposed idea is in line with government policy.
- d) Show that local people have been consulted and will be involved in the work.
- e) Demonstrate they are not working in isolation but are collaborating with other organisations and engaging with relevant government departments.
- f) Offer some useful lessons for future interventions and show how the applicant will gather information and learn from it.

**\* A group sending their funding proposal should mention if they have such a child in the project location.**

## PROJECT APPLICATION GUIDELINES

Read the short instructions at the top of each section of this application form and respond accordingly. Be brief and to the point without losing important information or ideas. Answer all questions as best you can. Remember, any incomplete applications will automatically be disqualified. Please email your application to [csr@ufaa.go.ke](mailto:csr@ufaa.go.ke) on or before the close of business **March 6, 2026** at 10:30AM stating the **Ref No. UFAA/ CSR/2026/1** in the submission email subject line. Alternatively, hard copies to be submitted at UFAA office located at Pacis Centre 2<sup>nd</sup> floor, Westlands, Nairobi. Applications delivered outside the deadline will be disqualified.

## PROJECT FUNDING DETAILS

#	Description	Budget (Kshs)
1.	Funding for implementation of a 'wezesha mjane' project (Funding ceiling will be Sh. 2, 250,000.00 per project. Two projects will be funded during this cycle)	4, 500,000.00
2.	Scholarship program for bright and needy students. (Scholarship is a complementary support, if applicable, to the winning project. It is not a separate project or a stand-alone funding).	500,000.00
	<b>Total</b>	<b>5,000,000.00</b>

NB: Timelines for proposed project(s) implementation will be for a maximum of one year. The scholarship will be paid directly to the school and will be available for the duration of the child's applicable period of study.

## Evaluation Criteria

### 1. Preliminary

- a) All proposals are to be delivered by email [csr@ufaa.go.ke](mailto:csr@ufaa.go.ke) or to be hand delivered to Pacis Centre 2nd floor Westland, Nairobi.
- b) All proposals are to be received on or before **March 6, 2026, at 10:30AM** as set out in the 'call for funding proposals.

NB: Project proposals failing to meet preliminary criteria will be rejected. Proposals that meet these criteria will proceed for evaluation at the Mandatory stage.

### 2. Mandatory Evaluation Criteria

- a) Name of organisation.
- b) Copy of registration certificate.
- c) Years in existence (must not be less than three (3) years since inception).
- d) A copy of the organisational constitution or Articles of Association.
- e) A list of ordinary members and committee members (if an SHG), Board members (if a CBO/NGO/FBO), Trustees (if a Trust), Board members and Trustees (if a Foundation).
- f) Most recent financial report (must be from a certified auditor if the applying organisation is an NGO, FBO, or Foundation).
- g) Organisation Phone number/ Office location (building, room no, street name).
- h) Name of contact person and evidence of employment.
- i) Project area – Sub-County and County.
- j) Project duration – Not more than 12 Months.
- k) Project cost.
- l) Amount requested from UFAA.
- m) Documents to be submitted as one in PDF format without a password.
- n) Self-declaration that the project proponent will not engage in any corrupt or fraudulent practices in the format provided.
- o) State the amount to be contributed by the organisation. Funding will be limited to projects that are not already funded by other donors.

NB: Project proposals failing to meet any of the above Mandatory requirements will be rejected at this stage. Proposals that meet these requirements will proceed for evaluation at the technical stage.

### 3. Technical Evaluation Criteria

- a) Organisational profile and key objectives (8marks)
- b) Key past achievements (5 marks) prorated -1 mark for each achievement supported by recommendation letters or completion certificates where applicable
- c) Proposed short title of your project (2 marks)
- d) Project summary (5 marks)
- e) Your Target Groups (5marks)
- f) How will your proposed project impact the targeted beneficiaries? (5 marks)
- g) How will UFAA's mandate/role be promoted during Project implementation (5 Marks)
- h) Problem definition (10 marks)
- i) Project idea (5marks)
- j) Project objective (10 marks)
- k) Implementation plan (10 marks) - develop a clear work plan and project methodology stating timelines and milestones to be achieved (prorate 4 marks for work plan and 6 for methodology)
- l) Project innovation (5 marks)
- m) Monitoring and Evaluation(10marks) - develop a monitoring & evaluation matrix or plan showing key risks and how to overcome them (prorate 5 marks for key risks, evaluation and monitoring)
- n) Sustainability (5 marks) - demonstrate how you will support the project beyond UFAA funding and how it will impact the environment positively
- o) Reliability and Scaling-up (5 marks)

NB: Project proposals scoring 80% of the set marks will proceed to financial evaluation

### 4. Financial Evaluation Criteria

- a) Detailed project budget as per template (10 marks)
- b) Aligned budget with project activities (5 marks)
- c) Budget within UFAA funding ceilings (5 marks)

NB:

- Administrative **not to exceed 25%** of the total Project cost requested from UFAA.
- Training Cost/Component **not to exceed 20%** of the Project cost requested from UFAA.
- Indicate own contribution towards the project (cash or in-kind)

Applicants are encouraged to use a suitable format to bring out the above issues. The template below may be used to generate the project proposal.

NB//:

- All applicants who are shortlisted will undergo an assessment visit. These initial visits are part of the assessments, proposal evaluation and final approval; thus, they do not in any

way amount to or confirm approval. Likewise, UFAA reserves the right to ask for additional information at any stage of the selection process.

- UFAA is not bound to fund any proposal and reserves the right to annul the process at any stage without incurring liability

**UFAA shall not award** grants to support the following or components of the following:

- a) Individuals
- b) Participation in international conferences
- c) Running costs, i.e., a project that seeks to pay workers' salaries. Running costs should be part of the administrative costs and not the sole purpose of the project.
- d) Projects or organisations that have existed for less than three (3) years

#### **PART A: APPLICANT INFORMATION**

##### **1. Contact Information of the applying organisation.**

<b>Name of your organisation</b>		<b>Name of contact person</b>	
<b>Postal Address</b>		<b>His/her current position</b>	
<b>Organization Phone Number</b>		<b>Phone of contact person</b>	
<b>Website address (if applicable)</b>		<b>E-mail address</b>	

##### **2. Type of applying organization** Please refer to the guidelines.

<b>Type of registration (tick as appropriate)</b>	<input type="checkbox"/> Self Help Group <input type="checkbox"/> Trust <input type="checkbox"/> Society <input type="checkbox"/> Community-Based Organisation <input type="checkbox"/> Non-Governmental Organisation <input type="checkbox"/> Company Limited by Guarantee <input type="checkbox"/> Other, please specify .....
<b>Organisation is legally registered</b>	<input type="checkbox"/> Yes <input type="checkbox"/> No
<b>Date of registration (dd/mm/yyyy)</b>	
<b>Registration number</b>	

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**3. Vision, Mission/structure of the applying organisation.**

Briefly state Vision, Mission and description of your organisation and its objectives	<b>Vision:</b>
	<b>Mission:</b>
	<b>Organisational profile and key objectives.</b>
	<b>Key past achievements.</b>

## PART B: PROJECT OVERVIEW

### 4. Project

**Title**

Proposed short title of your project	
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### 5. In not more than 200 words kindly give a brief of your project

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### 6. Project Area

In which county, constituency and ward in Kenya is your project going to be implemented?

County	Constituency	Ward
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### 7. Project

**Duration**

Expected length of your project (months).	
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### 8. Project Cost

a. Estimated total project cost in cash - Ksh: \_\_\_\_\_

b. Your CASH contribution - Ksh: \_\_\_\_\_

c. Amount requested from UFAA in cash - Ksh: \_\_\_\_\_ (Maximum funding by UFAA is Sh. 2,250,000).

d. Your in-kind contribution (list proposed contribution)

## 9. Your Target Groups

In this section, you are required to indicate the population that you intend to reach through the project for which you have asked UFAA to support.

Type of beneficiary (Mark with an 'X' where appropriate)	Number targeted	Type of beneficiary (Mark with an 'X' where appropriate)	Number targeted
Households <input type="checkbox"/>		Children (15-17 years old) <input type="checkbox"/>	
Schools <input type="checkbox"/>		Orphans and Vulnerable Children/ Widows <input type="checkbox"/>	
Grass-root organisations <input type="checkbox"/>			
Youth (aged 18 – 35 years) <input type="checkbox"/>			
Widowers <input type="checkbox"/>			
Children (0-6 years old) <input type="checkbox"/>			
Children (7- 14 years old) <input type="checkbox"/>			

**How will your proposed project impact the targeted beneficiaries?**

## PART C: PROJECT DETAILS

### 10. Problem

definition:

a. Who are the people targeted by the proposed project in your community?	
b. What issues/challenges/needs do these target groups face which the project will address?	
c. How did you identify these issues and needs?	

### 11. Project idea:

a. What is your project idea?	
b. How will it address the problem described above?	
c. How will it impact the target community?	
d. How will it promote knowledge on unclaimed assets and general financial literacy?	
e. How do you intend to fundraise locally so as to contribute your cash contribution in implementing this project idea?	
f. How will your project engage with the government at different levels?	

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**12. Project**

**objectives**

a. What would your project achieve?	<b>State the main objective/goal of the project:</b>	
b. What concrete results (specific objectives) would it have? Please list 3-4 key measurable results:	Result 1:	
	Result 2:	
	Result 3:	
	Result 4:	

**13. Implementation:**

What specific steps/activities would be taken to implement the project? List at least five main steps in chronological order:	Step 1:	
	Step 2:	
	Step 3:	
	Step 4:	
	Step 5:	

**14. Innovation:**

How is your project truly innovative and unique in your context?	
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## PART D: ADDITIONAL PROJECT DETAILS

- a. **Monitoring** - What are the indicators you intend to use to measure the success in implementation of planned activities? (*Match your indicators with the activities presented in section 14*)
- b. **Evaluation** – What are the indicators you intend to use to measure the outcomes of your intervention? (*Match your indicators with the results presented in section 13*)
- c. **Sustainability** – What strategies will you put in place to ensure that the benefits of this project continue to be felt beyond the period of UFAA support?
- d. **Risks** - What are the main risks associated with the proposed project and how will you mitigate them? List at least 2.
- e. **Reliability and Scaling-up** – What is the possibility of implementing your project elsewhere and what is the potential for this project to be expanded on a larger scale?

## PART E: PROJECT IMPLEMENTATION WORK PLAN

Outcome Objectives	Planned Outputs	Activities	Indicators	Means of verification	Timeframe
		1.			
		2.			
		3.			
		4.			
		5.			
		6.			
		7.			
		8.			
		9.			
		10.			

**PART F: Detailed project budget – Use the excel template below to complete the project budget**

<b>Budget for the Action</b>		<b>All years</b>				
<b>Particulars</b>	<b>units</b>	<b># of units</b>	<b>Unit rate</b>	<b>Costs</b>	<b>UFAA funding</b>	<b>Proponent contribution (Ksh/ in-kind)</b>
<b>Result 1:</b>						
1.1	e.g. units					
1.2	e.g. training					
<b>Subtotal</b>				<b>0</b>		
<b>Result 2:</b>						
2.1						
<b>Subtotal</b>				<b>0</b>		
<b>Subtotal for results (1-2)</b>				<b>0</b>		
<b>Grand Total</b>						

NB: Administrative costs are not to exceed 25% of the requested funding. Proponents are encouraged to contribute cash or in-kind contributions towards the proposed project costs.

**PART G: Supplementary Documentation**

*Please provide all the following documents.*

1. Copy of registration certificate
2. A copy of the organisational constitution or Articles of the Association.
3. A list of ordinary members and committee members (if an SHG), Board members (if a CBO/NGO/FBO), Trustees (if a Trust), Board members and Trustees (if a Foundation).
4. Most recent financial report (must be from a certified auditor if the applying organisation is an NGO, FBO, or foundation).

**SELF DECLARATION THAT THE PROJECT PROPONENT(S) WILL NOT ENGAGE  
IN ANY CORRUPT OR FRAUDULENT PRACTICE**

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 REPRESENTATIVE OF THE COMMUNITY GROUP/ TRUSTEE/ CHAIRMAN/ PROJECT MANAGER of.....  
.....(insert name of the ORGANISATION) who is a project proponent in respect of call for Proposal No UFAA/CSR/2026/1. for ..... (insert tender title/description) for UFAA and duly authorised and competent to make this statement.
2. THAT the aforesaid project proponent, its servants and/or agents /subcontractors will not engage in any corrupt or fraudulent practice and have not been requested to pay any inducement to any member of the Board, Management, Staff and/or employees and/or agents of UFAA, which is the procuring entity.
3. THAT the aforesaid project proponent, its servants and/or agents/subcontractors have not offered any inducement to any member of the Board, Management, Staff and/or employees and/or agents of UFAA.
4. THAT the aforesaid project proponent will not engage /has not engaged in any corrosive practice with any other project proponent participating in the subject proposal.
5. THAT what is deponed to here in the above is true to the best of my knowledge, information and belief.

.....

..... (Title)

.....

(Signature)

(Date)

Project proponent Official Stamp

**Annexures****Evaluation criteria****1. Mandatory**

<b>Description</b>	<b>Yes/ No</b>
Proposals are to be delivered by email, <a href="mailto:crs@ufaa.go.ke">crs@ufaa.go.ke</a> or hand delivered as set out in the 'call for proposals'.	
Name of your organisation	
Copy of registration certificate	
Years of Existence (must not be less than three (3) years since inception)	
A copy of the organisational constitution or Articles of Association	
A list of ordinary members and committee members (if a SHG), Board members (if a CBO/NGO/FBO), Trustees (if a Trust), Board members and Trustees (if a Foundation).	
Your most recent financial report (must be from a certified auditor if the applying organisation is an NGO, FBO, or foundation)	
Organization Phone number/ contact person/office location (building, room no, street name)	
Name of contact person and evidence of employment with the organisation	
<b>Project area</b>	
<b>Project duration</b>	
<b>Project cost</b>	
Amount requested from UFAA in cash	

**2. Technical**

Organisational profile and key objectives	2
Key past achievements	2
Proposed short title of your project	5
Project summary	5
Your Target Groups	5
How will your proposed project impact the targeted beneficiaries?	5
What is your project idea?	5
How will it address the problem described above?	3
How will it impact the target community?	3
How do you intend to fundraise locally to contribute your cash contribution for implementing this project idea?	3

How shall your project engage with the government at different levels?	3
What would your project achieve?	3
What concrete results (specific objectives) would it have? Please list 3-4 key measurable results:	4
What specific steps/activities would be taken to implement the project? List at least five main steps in chronological order:	5
How is your project truly innovative and unique in your context?	10
Monitoring	5
Evaluation	4
Sustainability	5
Risks	2
Reliability and Scaling-up	2
Project implementation work plan	10
<b>TOTAL SCORE</b>	<b>100</b>

### 3. Financial evaluation

Detailed project budget as per template	10
Aligned budget with project activities	5
Budget within UFAA funding ceilings	5
<b>TOTAL SCORE</b>	<b>20</b>

#### Request for Clarification or Information

If in need of more information, applicants are advised to send their inquiries through email to [csr@ufaa.go.ke](mailto:csr@ufaa.go.ke), indicating Ref No. UFAA/CSR/2026/1, on the subject line. Feedback and any other communication regarding the outcome will be shared through the same email addresses.

**Please Note:** Only applications sent to [csr@ufaa.go.ke](mailto:csr@ufaa.go.ke) or hand delivered at the UFAA Office at Pacis Centre 2<sup>nd</sup> Floor, Westlands, Nairobi will be reviewed. Applications received outside the

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deadline (March 6, 2026: 10:30 AM EAT) will be disqualified and treated as unsolicited proposals.