

## TERMS OF REFERENCE

### DEVELOPMENT IMPACT TRAINING COURSE

#### 1. Introduction

FSD Africa ("the Company") seeks to contract a Service Provider (individual, firm or consortium), hereafter referred to as "The consultant", to develop a training course on Social, Environmental and Market Development Impact Management and Measurement. This training course is aimed at FSD Africa staff (particularly investment teams), investee companies, and partners who need to be familiar with, and implement, the FSD Africa Development Impact approach and practices. This training course will be developed initially as a face-to-face course and will be converted to an online learning product to enable online or hybrid delivery.

There are two broad components to these Terms of Reference. The first component (outlined in sections a and b of the Scope below) is the development of the course content and delivery of a face-to-face version of the training. The second component (outlined in section c of the Scope below) is the conversion of the course material into an on-line training programme.

FSD Africa welcomes proposals from organisations that have the skills and experience to meet the needs of both components. However, FSD Africa recognises that the two components require quite different skill sets, and therefore FSD Africa also welcomes proposals put forward by two (or more) organisations working together as a consortium. The assessment criteria outlined below will be used to evaluate all the bids received.

This work is expected to take place between October 2022 - December 2022, with the goal to have the training course rolled out in January 2023. The total duration of the assignment is expected to be 45 days i.e. 20 days for component 1 and 25 days for component 2.

#### 2. Background

##### 2.1 FSD Africa

FSD Africa is a specialist development agency funded by UK Aid from the Foreign, Commonwealth & Development Office (FCDO). Set up in 2012, FSD Africa has the mandate of building and strengthening financial markets across sub-Saharan Africa. We work to reduce poverty by enhancing Africa's financial markets by tackling the most intractable financial market challenges in Africa - including the lack of long-term finance, limited pathways for sustainable investment and inadequate risk management capacity. We focus our work where the need is greatest and where we believe the potential for impact is the most significant. We have a specific mandate to invest in breakthrough, innovative ideas that we believe can have a transformative impact.

In 2021, we made a significant shift in our strategy to enable a more sustainable approach to finance Africa's development. This entails implementing interventions that catalyse mobilisation and efficient deployment of green finance into sustainable, inclusive growth initiatives and deliver environmental and social outcomes. We shall also help our priority countries drive transformational, pro-investment policy reforms and develop innovative transactions to fund Africa's green transition. While foundational work

in financial markets will continue, the increasing emphasis on green finance and transaction readiness is a big priority. Please find more details about FSD Africa on our website at [www.fsdafrica.org](http://www.fsdafrica.org)

## **2.2 Development Impact at FSD Africa**

FSD Africa's mandate and strategic approach is aligned to the Sustainable Development Goals and the Paris Agreement. At FSD Africa we have the ambition to integrate social and environmental development impact considerations in all aspects of the organization and at all stages of the intervention (investments, TA, capacity building) decision making process.

Our Theory of Change (ToC) brings together our objective to help finance a sustainable future in Africa, defined by growth in GDP in combination with poverty alleviation, resilience, and sustainability in relation to the environment and climate change, mobilising investments through the financial system.

Our ToC is an ambitious one and requires us to have complex systems in place for measuring, effectively communicating, and learning from our work. Over the years, we have continued innovating and improving our Social, Environmental and Market Development Impact (DI) Management and Measurement approaches. In 2021 we have updated our DI guidelines, aligning them with FSD Africa's strategic plan, as well as the approach of the Impact Management Project. The training course seeks to provide FSD Africa staff, investee companies and partners with a thorough understanding of the FSD Africa approach to managing and measuring Social, Environmental and Market Development Impact.

## **2.3 The FSD Africa Academy**

FSD Africa has developed a learning platform - FSD Academy - which is an intelligent learning portal that is available 24 hours, 7 days a week and is multi modal (Watch. Read. Listen. Practice). The programmes offered on this platform are digital with an instructor-led course. The modules vary from soft skills, programme management, leadership, and some aspects of technical development. The course content from this assignment will add to FSD Africa staff's technical development list, enabling FSD Africa staff and partners to have access to DI content, training, orientation. Etc., at all times.

## **3. Scope of work**

The scope of the work focuses on training FSD Africa staff, investee companies and partners on FSD Africa's Social and Environmental Impact Management and Measurement System. The Terms of Reference (ToRs) are designed to be flexible and not fully predefined to allow for the content to evolve and be adjustable with emerging insights on how to most effectively communicate and embed our approach.

The consultant's main tasks will include the following: -

- i. Define training course objectives and applicable methods
- ii. Develop training course content and design training course
- iii. Deliver the training in a face-to-face setting
- iv. Deploy the course on hosting server (FSD Academy) and go-live

Considering the above background, the consultant will be expected to perform the following tasks:

### Component 1

- a. Define training course objectives and applicable methods
  - i. In a kick-off meeting together with a representation of the FSD Africa DI team, define training course objectives and further refine target audience.
  - ii. Review the available materials to assess their relevance, e.g. context in which the development impact objectives are set, DI guidelines, orientation package for staff, other secondary sources used by the team, case studies and impact reports.
  - iii. Meet with a representation of FSD Africa pillar teams to further understand the knowledge gaps and learning needs.
  - iv. Use the needs assessment/knowledge gap assessment of the partners, which is already available, to better understand the challenges they face and think if/how the training course can be used to address those.
  - v. Based on the above, as well as the consultant's own knowledge of the key aspects of the DI landscape, processes and best practice, develop a table of contents for the training course.
  - vi. suggest applicable methods and workplan to develop and deliver the training course.
  - vii. Present and discuss the approach and workplan with FSD Africa DI Team.
  
- b. **Develop Course Content and Design**
  - i. Collect and assess relevant existing and available materials prepared by the FSD Africa DI team (e.g. FSD Africa DI guidelines) and other teams (e.g. communications team).
  - ii. Prepare relevant additional content (including case studies) based on the suggested table of contents.
  - iii. Convert content into training materials that can be used for face-to-face sessions and that can also be adapted for online activities.
  - iv. Run a training session with FSD Africa DI team to test the course content.

### Component 2

#### **C. Deploy the Course on Hosting Server (FSD Academy) and Go-live**

- i. Develop and submit a high-level instructional design document (IDD) that includes the course concept, approach, tools, work plan, collation of existing training content, and limitations, as well as a System Requirement Specifications (SRS) document (that describes all data, functional, and behavioural requirements according to the hosting platform requirements ie FSD Academy).
- ii. Prototype - Select two e-topics for testing in the FSD Academy host portal
- iii. Work with the FSD Africa IT team to test the selected e-topics in the hosting portal (FSD Academy)
- iv. Convert the remainder of the training materials into e-learning modules on the pre- agreed training themes. Create interactive modules with audio/video scripts, multimedia components, images, animations, stimulations, quizzes, and case studies.
- v. When any piloting issues have been resolved, work with FSD Africa IT Team to deploy the full course into the hosting portal (FSD Academy)
- vi. Work with FSD Africa project focal point to test the course with partners.

#### 4. Expected Deliverables and Timing

##### Component 1 (activities a and b)

- i. Workplan to develop the training course
- ii. Training materials for the face-to-face training course, including slides, case studies and other exercises, and hand-outs as necessary
- iii. A list of key references for learners, to be incorporated into the modules
- iv. Background information on the learning objectives of each module of the course and how the learning objectives are being met
- v. One training course delivered to the FSD Africa DI team in person

This component is expected to be delivered in 20 calendar days from the contract start date.

##### Component 2 (activities c)

- vi. Detailed content, including all on-screen text and voice-over script, illustrated with photos and videos, in PPT format for the e-learning module, including references to source materials, and photo/video credits.
- vii. Instructional design document (IDD)
- viii. Onboarded course into the FSD Academy

This component is expected to be delivered in 45 calendar days from the contract start date.

#### 5. Experience required

##### For component 1 (activities a and b)

###### Essential:

- Experience in developing training materials for staff and stakeholder development programmes to meet specific learning objectives
- Experience in developing training materials that are participatory and apply a suitable range of learning tools (illustrations, case studies, test questions, discussion points etc) to engage participants and reinforce learning
- Experience in providing in-person training to small groups
- Experience of delivering a high-quality output on schedule and with value for money considerations, applying robust project management processes
- Experience in development impact management in development programmes

###### Desired:

- Experience of developing training for organisations that have a learning mindset and are applying new ideas
- Experience of working with different types of organisation including NGOs and the private sector

##### For component 2 (activities c)

- Experience of designing e-learning with a range of learning tools potentially including animations, online discussion forums and online quizzes
- Experience of providing all of the IT input and interface required to translate the training materials developed in component 1 into an online course

## 6. Project team

The consultant will work together with a project team from FSD Africa, including a FSD Africa Project focal person, a representation of the FSD Africa DI team and IT team.

## 7. Invitation to submit a proposal

FSD Africa invites qualified Service Providers to submit a proposal discussing the approach you intend to execute this assignment effectively. Your proposal should contain:

- i. Your interpretation of the tasks set out in the ToR. Please include short description of your understanding of the role of the Consultant and the approach to be used as outlined in these Terms of reference and highlight any risks/challenges you perceive facing as you work on this assignment.
- ii. A description of how you intend to fulfil the Services within the suggested timeline and confirmation of your ability to meet the timelines
- iii. Your experience on similar assignments and the team's technical expertise
- iv. A budget for both professional fees and reimbursable expenses (if any)- refer to annex 2
- v. A confirmation of your team, plus an indication of how tasks above will be shared. Include CVs of key individuals.

Short-listed bidders may be invited to make a presentation of their proposed approach.

Proposals should not exceed 10 pages excluding annexes. Your proposal should be submitted to FSD Africa by email: [bids@fsdafrica.org](mailto:bids@fsdafrica.org), by noon (12pm) (EAT) on **05 October 2022** under a subject line reading 'Invitation to tender: DI Training Consultant.

## 8. Basis of award

FSD Africa will award a contract to the most economically advantageous tender based on the following criteria:

<b>Mandatory requirements</b>	
Demonstrated experience in developing participatory learning materials for training programmes for staff and stakeholders	
Demonstrated knowledge of Development Impact, including key themes and approaches	
Demonstrated experience in developing an e-learning product	
Evidence of quality management processes and experience to deliver a high-quality output on schedule and with value for money considerations	
Available to start at the required time and can engage intensively with this assignment to deliver outputs as per schedule jointly agreed with the Director, Development Impact.	
<b>Assessment criteria</b>	<b>Weighting (%)</b>

Relevant, demonstrated experience and capacity of firm in this area	40%
Demonstrated expertise of key individuals to be involved in this project	20%
Content, quality and originality of proposal	20%
<b>Fee basis and total costs</b> There should be a clear breakdown of the costs. Financial proposals will be scored using the formulae:  FS = 20% x LB/BP where: FS = is the financial score LB = is the lowest bid quoted BP= is the bid of the proposal under consideration. The lowest bid quoted will be allocated the maximum score of 20%. Fee quoted must be inclusive of applicable withholding tax.	20%
<b>Total</b>	<b>100%</b>

## 9. Contact

Questions or comments in respect of these terms of reference should be directed by email to: [bids@fsdafrica.org](mailto:bids@fsdafrica.org) and must be received before 12 pm (EAT) **26 September 2022**. Responses will be communicated on **27 September 2022**.

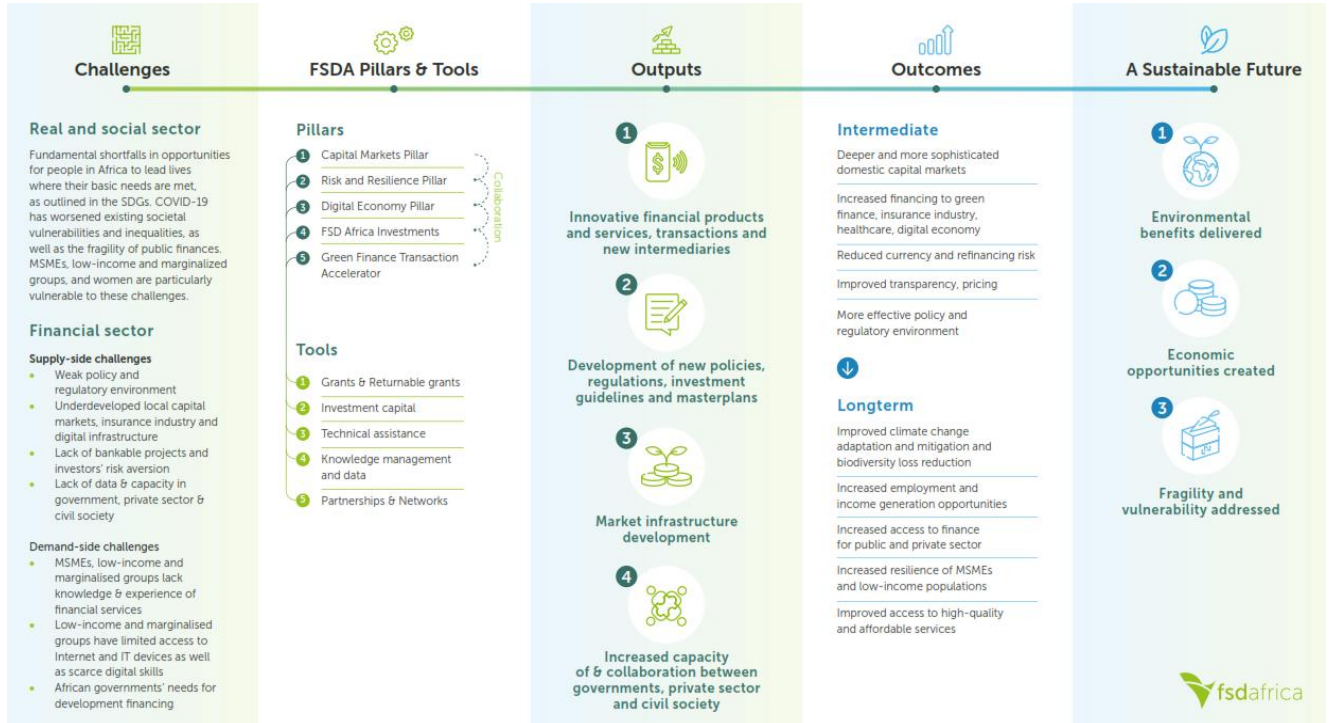
## 10. Applicable Taxes

As per Kenya's tax law, FSD Africa will pay the Service Provider after withholding the appropriate taxes at the applicable rate between Kenya and the Service Provider's country of tax residence, considering any tax treaties in force. It is the responsibility of the Service Provider to keep themselves apprised of these applicable taxes.

The below table, however, provides guidance on the applicable rates as per tax regimes

Country	WHT Rate
Kenya	5%
United Kingdom	12.5%
Canada	15%
Germany	15%
India	10%
Non-resident rate for citizens of EAC member countries	15%
All other countries	20%

## Annex 1- FSD Africa ToC



**Annex 2: Proposed Fee Schedule**

Costs should be shown separately in the format set out below. Fees proposed by tenderers should be inclusive of all taxes

<b>Consultancy fees*</b>	<b>Days</b>	<b>Fee USD/GBP</b>	<b>Total USD/GBP</b>
xx			
xx			
<b>Total remuneration</b>			<b>0.00</b>
<b>Reimbursement costs**</b>	<b>Unit</b>	<b>Cost USD/GBP</b>	<b>Total USD/GBP</b>
xx			
xx			
<b>Total reimbursement cost</b>			<b>0.00</b>
<b>Total proposed costs</b>			<b>0.00</b>
<i>*Fees incl of all taxes</i>			
<i>**Expenses to be reimbursed on actual costs as per FSD Africa's travel policy</i>			