

REQUEST FOR PROPOSAL

SUBJECT:

**TENDER FOR THE SELECTION OF A TRAINING FIRM TO FACILITE A
GENDER-SMART INVESTING TRAINING FOR FINANCIAL INSTITUTIONS
AT THE AFAWA FINANCE SERIES: SOUTH AFRICA**

REF: AGF/RFP/AFAWA/2024/006

Launching Date: 2nd September,2024

Closing Date: 13th September,2024

1700Hrs EAT.

TERMS OF REFERENCE FOR THE FACILITATION OF A GENDER-SMART INVESTING TRAINING FOR FINANCIAL INSTITUTIONS: **SOUTH AFRICA**

1.0 BACKGROUND

The African Guarantee Fund in partnership with the African Development Bank's Affirmative Finance Action for Women in Africa (AFAWA) initiative are organizing the 8th edition of the AFAWA Finance Series targeting key stakeholders to dialogue and showcase the many advantages that women SMEs can contribute to the South African economy. The series is of paramount importance for financial institutions as it analyzes the existing opportunities and proposes solutions aimed at unlocking financing for women SMEs.

In this context, a business development, training and engagement series with partner financial institutions, key regulatory-policy stakeholders and government agencies is proposed to strengthen the understanding of the AFAWA initiative and its Guarantee for Growth (G4G) program. The series also aims to explain how the program can help de-risk financial institutions that on-lend to Women SMEs, while increasing their value proposition for the Women entrepreneur's market. The AFAWA Finance Series will also give high visibility to the AFAWA initiative and its activities in South Africa.

The event is a physical event that will be held in **Johannesburg** from **Tuesday 15th October** to **Thursday 17th October 2024** and involves the following activities:

- A High-level Gender Finance Conference will be undertaken on **Tuesday, 15th October 2024** and it will bring together the Directors/CEOs of the different stakeholders in the financial services sector, Development Financial Institutions, Government and Business Development Service Providers to deliberate on the opportunities, challenges and solutions in availing financing to women entrepreneurs in South Africa , and
- A 2-day Gender Smart Investing Training for Financial Institutions in South Africa will be undertaken from **Wednesday 16th October** to **Thursday, 17th October 2024**.

The AFAWA Finance Series has previously been held in Tanzania, the Democratic Republic of Congo, Ghana, Angola, Nigeria, Kenya and Togo.

2.0 SCOPE OF WORK

The successful training consultant will be responsible for the preparation and facilitation of the training in South Africa .

Detailed specifications for the services and tasks being requested under this assignment include:

1. Definition of Gender smart investing,
2. Presentation of data on the current gender smart/women financing status in South Africa
3. Why gender smart investing?
4. Presentation of existing business case for gender smart investing by financial institutions
 - a. Globally
 - b. Africa, and
 - c. South Africa
5. Facilitate discussions on the challenges inhibiting FIs in South Africa from initiating and growing their women financing portfolio,
6. Facilitate deliberations on practical solutions necessary to address the challenges,
7. 2X Challenge – Financing for Women: understanding and applying the eligibility criteria,
8. Practical and detailed process for a gender-sensitive financial institution,
9. Facilitate a session for financial institutions present to develop a Plan/Steps towards for becoming a gender-sensitive financial institution.

3.0 DELIVERABLES

For this event, the following deliverables are expected:

- Training Needs Assessment Report
- Pre and Post Training Survey Report
- Training Programme
- All Training Materials (Case studies, Powerpoint etc) in soft version,
- Training Report.

4.0 EVALUATION CRITERIA AND METHODOLOGY

A two-stage process shall be adopted in evaluating proposals. Proposals shall be ranked according to technical score (Nt) and financial score (Nf) using the weights (T = the weight given to the technical proposal, 70%), (F = the weight given to the financial proposal 30%) (T + f = 1). .

The final score shall be calculated as follows: Final Score (NG) = (Nt x T%) + (Nf x F%)

a) Technical Evaluation (Weight 70%)

Bidders shall obtain a minimum of 70 points following evaluation of technical proposals (“Qualifying Technical Score”) to be considered for financial evaluation. Bidders obtaining less than the Qualifying Technical Score shall be rejected. AGF shall carry out the evaluation applying the evaluation criteria and point systems specified in the below table. Each responsive proposal shall be attributed a technical score based on the Technical Evaluation (weighing 70%) and live Demonstration (weighting 30%).

Criteria		Points	
1	MANAGEMENT APPROACH, EXPERIENCE AND TECHNICAL CAPABILITIES		30
1.1	Understanding of the work, including creativity and thoroughness shown in understanding the objectives of the TOR and specific tasks, and planned execution of the project. International, Africa, Experience in South Africa is critical.	10	
1.2	The firm should have a minimum of five years of work experience in undertaking similar training in several countries within the Southern African sub-region.	5	
1.3	Experience in working with the international organizations, UN organizations, government organizations, Banks or other similar institutions. (Past experience with AGF will be an added advantage.)	5	
1.4	Proven history of international standard quality in training	5	
1.5	Quality and effectiveness of the allocation of personnel and resources.	5	
2	PROPOSED METHODOLOGY AND APPROACH		30
2.1	Provide a detailed description of the methodology for how the firm will achieve the TOR, keeping in mind the appropriateness to local conditions and project environment. (Knowledge of the Region)	10	
2.2	Degree to which the bidder’s proposal demonstrates an understanding of the issues facing commercial banks and other financial institutions.	5	
2.3	Evidence of specific methods and techniques for completing each task, to include such items as quality assurance, and customer-service.	10	
2.4	Ability to produce quality output under strict time limits.	5	
3	PAST PERFORMANCE		15
3.1	The bidder’s history of successful completion of similar projects; history of conducting high-quality training; history of timely training preparation and within budget. Similar trainings must convey similarity in topic, dollar value, workload, duration, and complexity. Experience with similar Trainings (with over 100 participants) Three (3) certificates of satisfactory performance (5 points) Over (3) certificates of satisfactory performance (10 points).	15	
4	PROJECT PLAN		10

4.1	Describe the overall project plan toward planning and implementing this training activity.	10	
5	COMPOSITION AND QUALIFICATIONS OF PROPOSED TEAM		15
5.1	The currency, quality and depth of experience of individual personnel in working on similar projects. A minimum of three (3) years of experience in working in or with financial institutions and specifically commercial banks. (attach CVs of key staff). The key staff should have working proficiency in English.	5	
5.1	Head of team should have at least three (3) years of experience as a Lead Trainer and at least five (5) years of experience in financial services and specifically in women financing (attach CV)	10	
	TOTAL TECHNICAL SCORE		100

An offer is declared technically valid and is considered for the financial analysis if it obtains a minimum score of **Seventy (70) points**.

b) Financial Evaluation

The financial proposals shall be checked for completeness and correctness for computational errors.

For the purpose of evaluation, AGF will convert all bid prices expressed in the currency of the RFP in which the bid price is payable, into the AGF's Units of Accounts (UA) by using its monthly moving average rate for the applicable month (deadline for submission of proposals).

The financial proposals shall be evaluated in accordance with the formula below. The bidder or bidders with the lowest financial proposal (Fm) shall be given 100 points. The financial scores of the other bidders (F) shall be computed as follows:

$$\text{Nf (financial score)} = 100 \times \text{Fm} / \text{F}$$

(F = amount of financial proposal converted in the common currency)

c) Final Ranking

Final Ranking: Proposals shall be ranked according to the Total Technical Score (Nt) and financial score (Nf) using the weights $T + F = 1$ (T = the weight given to the technical proposal, 70%), (F = the weight given to the financial proposal 30%).

$$\text{Final Score (NG)} = (\text{Nt} \times 70\%) + (\text{Nf} \times 30\%)$$



The bidder or bidders with the highest combined technical and financial score will be ranked first and eligible for award of the contract.

5.0 SUBMISSION OF PROPOSAL

Interested firms with the required qualification and experience may submit their **Technical & Financial Proposals** to the following address: procurement@africanguaranteefund.com on or before **Friday 13th September 2024 at 1700hrs EAT.**

Awardee will be contacted directly via email.

NOTE: -

AGF reserves, at its sole discretion, the right to select or reject, either in totality or partially, any or all proposals made in the context of this EOI. Any such decisions made will be final and no correspondence will be engaged in, other than to inform the bidders of the outcome of the process.

APPENDIX 1

PROPOSAL / METHODOLOGY / DESCRIPTION OF THE APPROACH / SOLUTION

In this section, the Bidder should provide a comprehensive description of how he will provide the required Services in accordance with the Terms of Reference (TOR) included in this RFP. A framework is provided below to guide and assist the Bidders in structuring their Technical Proposals.

- a) Technical Approach, Methodology, and Organization of the Bidder's team. {Please explain your understanding of the objectives of the assignment as outlined in the Terms of Reference (TOR), the technical approach, and the methodology you would adopt for implementing the tasks to deliver the expected output(s); the degree of detail of such output; and describe the structure and composition of your team. Please do not repeat/copy the TORs in here.}
- b) Work Plan and Staffing. {Please outline the plan for the implementation of the main activities/tasks of the assignment, their content and duration, phasing and interrelations, milestones (including interim approvals by the Client), critical path, method for monitoring and reporting, action items indicating party responsible for implementation [i.e., Bidder or the Bank], period required to commence services, and tentative delivery dates of the reports. The proposed work plan should have proposed service levels and related indicators, Quality assurance procedures, complaint management process, warranty, etc. and should be consistent with the technical approach and methodology, showing understanding of the TOR and ability to translate them into a feasible working plan and work schedule showing the assigned tasks for each expert. A list of the final documents (including reports) to be delivered as final output(s) should be included here. The work plan should be consistent with the Work Schedule Form.}
- c) Technical Competence and Experience: {Please provide the client with the list of major customers and description of type of services provided. Provide data/information on, at least three previous contracts of a similar nature.}
- d) Comments (on the TOR and on counterpart staff and facilities): {Your suggestions should be concise and to the point, and incorporated in your Proposal. Please also include comments, if any, on counterpart staff and facilities to be provided by the Client. For example, administrative support, office space, local transportation, equipment, data, background reports, etc.}
- e) Bidders should provide details of the current disaster recovery and business continuity program they may have in place and how this would ensure continuous provision of the required services if contract.