

Terms of Reference (ToR)
for
Conducting Financial Management
Training for Partner Organization

2024

ToR for conducting financial management training for partner organization

1. Background

The Royal Commonwealth Society for the Blind (RCSB)—presently known as Sightsavers, is an international development organisation from the UK. Sightsavers commenced its programme in Bangladesh since 1973 in partnership with both government and non-government organisations. Sightsavers work is concentrated in three thematic areas, which are: Eye Health, Education and Social Inclusion (<https://www.sightsavers.org/where-we-work/bangladesh/>)

Sightsavers has been implementing the project 'District Inclusive Eye Care Programme' to restore, save and protect people's sight in an environment, which is inclusive and accessible for poor and marginalized groups, including women and men with disabilities. This four-year project has started from January 2022 in 16 districts of Bangladesh and will continue until December 2025. The project is being promoted Inclusive Eye Health (IEH) in the project districts, including creating provisions for accessibility in the partner hospitals for the persons with disabilities, and other marginalized groups. The programme is being implemented by 10 NGO hospitals and seven government hospitals.

Sightsavers has been implementing 'District Inclusive Eye Care Programme' in partnership with government and non-government hospital & other development partners since 2022. The goal of the programme is to improve equitable access to sustainable quality eye health services for women and men, with and without disabilities and/or belonging to other marginalized groups in target districts in Bangladesh. This is a four years programme which is being implementing in 16 districts of Bangladesh and this will be continued till December 2025. There are 08 NGO partners who are responsible for implementing the programme. The partners are responsible both for programmatic and financial performance of the programme. Sightsavers is providing necessary supports to partners for this. At the partners end, respective finance department including finance focal who is responsible for this programme are dealing the financial issues such as budget preparation, monthly finance reporting, budget variance analysis with justification (where required), annual audit, procurement, etc. While dealing with the financial issues, the respective finance focal along with the finance department of partners are facing different challenges. Besides, they have limited scope to update themselves with relevant changes/amendment of government's policies, rules and regulations. To address the challenges faced by the partners, this has been decided to conduct an extensive training on financial management for the partners where both the finance and programme persons will be participating.

2. Objectives of the training:

The overall objective of this training is to enhance the capacity of partner organizations on financial management. It is expected that around 35 participants from different partner organizations will attend the training programme. The specific objectives of the consultancy are as follows:

- To conduct on-line Training Need Assessment (TNA) of the participants through support from DIECP partner organizations.
- To deliver/facilitate a three-day long interactive training session on financial management training for the finance and project management staff of partner organization ensuring that they

acquire the necessary skills and knowledge to effectively manage their finance. s.

- To conduct pre-test and post test of the trainees and measure the knowledge and skill gained from the training.
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The training should be delivered at Gazipur/Manikganj district, which will be finalized later

3. Scope of work:

Sightsavers management intends to enhance financial management skill among partners financial staff of District Inclusive Eye Care Programme (DIECP) for properly maintaining day to day financial activities. It is expected that the participants of the training will be able to handle their regular finance related task as well as manage their inventory and other finance related legal issues. The scope is not only limited to:

1. Bangladesh Accounting Standard (BAS) and International Accounting Standard (IAS)
2. Policy adherence and maintaining compliances.
3. Comprehensive understanding on financial management, planning, budgeting, budget utilization & monitoring, financial reporting.
4. Expenditure verification and payment procedure
5. Internal control system
6. Conduction of audit
7. Ensure value for money.
8. Standard procurement process
9. Inventory and fixed asset management.
10. Withholding VAT and Tax deductions as per law of the land
11. Income Tax Act 2023 (changes and new interventions)
12. NGOAB rules and regulations, FD6 preparation and revision.

4. Timeline of the assignment:

The training will be conducted for 03 (Three) days long from 19-22 May 2024. For any change of programme date/schedule, Sightsavers will notify beforehand to the selected firm/individual consultant.

5. Profile of the consultancy firm/individual consultant:

This TOR is specifically design for any single firm/individual consultant, but joint proposal is allowed.

5.1 Qualifications and Experience:

Interested firms/individual consultants are expected to have the following competencies:

- Minimum five years' experience in organizing financial training or similar activities to different international and national level non-government organizations.
- Client list and experience certificate/contract letter/appreciation letter of organization/Institution) as proof of experience.
- The firm/individual consultant has relevant technical and professional knowledge and skills in conducting similar training.
- CV of trainer/s/facilitator/s to be attached with letter of intent.

- Experience in working with Persons with Disabilities will be an added qualification

6. Outputs and deliverables:

It is anticipated that the consultant will employ participatory and interactive methods and approaches. At that the consultants shall adopt modern conventional methodologies in order to affect the transfer of knowledge and skills to the participants. Specially, the following training methods shall be utilized as a minimum:

- Clear methodologies to be adopted during the training.
- Discussions and tutorials
- Practical demonstrations
- Multimedia presentations
- Group work/discussion
- Use of simulators/models
- Case study

The selected consultant/consulting firm have to deliver:

- Training module.
- Detail training programme schedule for 3 days including travel time to the training venue.
- Report on Pre and post evaluation of training participants.
- Training completion certificate.
- Training completion report. A comprehensive report on the conducted training sessions, incorporating participants feedback, lessons learned and recommendations for future training need.

7. Contract Management:

The contract will be managed by the Finance & Support Services Manager of Sightsavers (mshahibul@sightsavers.org) with regular consultation with the SMT.

The consultant will adhere to the contractual terms and conditions with Sightsavers, including clauses in relation to confidentiality, data protection and intellectual property rights. It is expected that the work will adhere to Sightsavers' guidelines on ethical considerations for evaluation, Safeguarding policy and Code of Conduct.

8. Expenses and payment schedule:

The awarded consultancy firm/individual consultant is expected to cover all costs and materials related to this exercise as part of their proposed fees including travelling (to and from the training venue). However, Sightsavers will cover costs associated with training including venue costs, food costs, reasonable accommodation costs, design costs etc.

Sightsavers will make payment of 100% (full payment) within 07 working days of submission of all deliverables and accurate invoice/bill to Sightsavers.

9. Information for consultancy firm/individual consultant:

9.1 Introduction

- Eligible consultancy firm/individual consultant with required qualifications and experience can submit proposal.
- Costs of preparing the proposal including attending the pre-bid/physical presentation on proposal/negotiation meeting (if required) and other related costs are not reimbursable.
- Any attempt of undue influence on the evaluation and selection process will lead to cancellation of the proposal from the subsequent process.
- Any misrepresentation of facts including the facts on professional /institutional capacity will also lead to cancellation of the proposal.
- Sightsavers reserves the right to amend the bidding document and decide to hire additional consultant for the completion of work if deemed necessary.

9.2 Preparation of Technical and Financial Proposal

- Consultants are requested to submit their proposal written in English (font - Arial, Size -11).
- The technical proposal should contain the following:
 - Considering the organizational context, related documents, etc. methodology and mode of conduction of training.
 - Timeline in weeks for the major output/deliverables.
 - Previous relevant work experience that represents the firm's/individual consultant's merits in line with the ToR and credibility to undertake the given assignment.
 - Detailed profile of training consultant/individual including resource persons and key members for this assignment.
 - Technical proposal must not exceed 10 (ten) pages (excluding CVs and indicative estimations) and should be submitted duly signed in PDF format.
- The financial proposal should contain the following:
 - The detailed budget required for the accomplishing the tasks specified in the section 6 (outputs/deliverables) in consideration of section 8 (expenses and payment schedule).
 - The budget should not include the accommodation and food cost for conduction of training for training days.
 - The budget should not include income tax as a separate head.
 - VAT should be mentioned in the budget as per government regulation.
 - Copy of trade license, VAT registration certificate, TIN certificate, PSR, and bank account details

9.3 Submission of Proposals

- The technical proposal and proposed budget should be submitted electronically to the following email address:

mimran@sightsavers.org and cc to

bislam@sightsavers.org with subject line as follows:

Facilitation & conduction of financial training for partners

- Proposal submitted to any other e-mail account except the above will not be accepted.
- Submission of proposal after the deadline 30 April 2024 will not be accepted.
- Two different files should be generated for technical and financial proposals. However, both two files should be submitted into one zip folder with a cover letter addressing the Country Director, Sightsavers.
- The procurement committee will evaluate the proposals in line with the ToR following the evaluation criteria.
- The proposals will be reviewed on the following indicator/criteria (technical: financial: 70:30):

9.4 Proposal Evaluation

SI#	Indicator/criteria	Weightage
1	Organization profile	10
2	Relevant work experiences in conducting financial management training to the NGOs	20
3	Training methodology and plan for timely completion of assignment	10
4	Experience and expertise of proposed trainers as revealed by submitted CVs	30
5	Financial plan for the training	30
	Total	100

- 50 score out of 70 would be treated as minimum qualification marks of the technical evaluation, those will be scored below than the minimum qualification marks will not be evaluate for the financial evaluation.
- As part of the evaluation process, Sightsavers may request over email to selected consultancy firm/individual consultant for delivering a brief presentation at Sightsavers Country Office to understand the capability and competence of consultancy firm/consultant(s).
- Sightsavers reserves the right to accept and reject any proposal without assigning any reason or whatsoever and may decide to go for re-advertisement without going further down the process.

9.5 Negotiation

- Once the proposals are evaluated, Sightsavers may enter into negotiation with one or more appropriate firms/consultants before the final selection.
- If negotiations fail, Sightsavers may or go for re-advertisement.

9.6 Awarding of Contract

- The selected firm/individual consultant is expected to sign an agreement with Sightsavers within a week of communication of selection decision and before commencing the work.
- Sightsavers will deduct VAT and Tax at source according to the GoB rules and deposit the said amount to government treasury. Sightsavers will share VAT and Tax deposit challan to Consulting firm/individual consultant duly.

9.7 Confidentiality

- Information relating to evaluation of proposals and selection of firm will not be disclosed to other participating bidders until the winning firm/ consultant has been officially notified of their selection.