P3.S3.a.T1 Model ToR for training on business skills & business planning

# **TERMS OF REFERENCE FOR THE CONTRACTING OF A CONSULTANCY FOR THE TRAINING OF ENTREPRENEURS IN <BUSINESS MODEL AND BUSINESS PLAN>**

**Background**

Within the framework of the project/program <project/program name>, funded by <donor(s)> in order to promote productive activities (micro-entrepreneurships) in the <area>, with <target group(s)>. It has been planned to carry out a training process for people with an entrepreneurial spirit and entrepreneurs with minimal or no experience, which will allow them to design or adapt their products/services according to the current context. After training, entrepreneurs will receive support to prepare their business plans and economic proposals[[1]](#footnote-1).

**Consultancy**

Training microentrepreneurs in the formulation of basic business models and business plans and support for the preparation of their business plans and economic proposals[[2]](#footnote-2).

**Objective of the consultancy:**

* Provide training and advice to entrepreneurs in vulnerable situations <target group(s)> affected by <crash/disaster>, that allows them <start and/or recover and/or strengthen> productive or service activities in the <sector/subsector>.

**Specific objectives:**

* Train <number> participants with a business idea from <target locations/geographic areas> and support the development of a basic business model that allows them to define their business idea focused on the < sector/subsector>.

(*and/or*)

* Train <number> Entrepreneurs of the <localities/geographic areas> with already existing micro-enterprises focused on the area <sector/subsector> and support the elaboration of a business <recovery/strengthening> plan, adapted to the current context of <crisis/shock/etc.>

**Consulting company activities:**

*(Examples of minimums)*

1. Establish a proposal, strategy, work plan and training methodology for microentrepreneurs.
2. Submit a training schedule for <the group(s) of beneficiaries> including <design and/or improvements> of their business ideas according to market requirements.
3. Train entrepreneurs in the planned topics
4. Accompany participants in the development of business plans according to their profiles.
5. Etc.

**Outputs:**

1. <Number> Entrepreneurs trained in basic business skills and construction of a basic business model and business plan.
2. <Number> business plans drawn up
3. Etc.

**Methodology**

Participatory, it must incorporate methodologies that allow maintaining adequate distance in the case of being face-to-face (COVID-19); in the case of being online, consider the resources available to entrepreneurs and facilitate their access to connectivity.

**Guidance information for content (***example***)**

* + - Define the business idea.
    - Determine the strengths and weaknesses, the opportunities and risks presented by their business idea.
    - Learn about the importance of marketing and develop their own simple marketing plan.
    - Learn how to conduct a market assessment to gather the information required to plan and implement their business idea.
    - Estimate the income, costs and profit of their business idea.
    - Determine the capital they need to start the business.
    - Learn how to keep simple records.
    - Integrate all the information acquired into a simple business plan.

*(For recovery of existing micro-businesses)*

* + - Innovate in the face of crisis (adaptability).
    - Productive innovation.
    - Shifting to Digital Marketing: E-commerce and E-marketing.

**Schedule (***example***)**

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Activities** | **Schedule in weeks** | | | | | | | | | | | | | | | | | | |
| **Month 1** | | | | **Month 2** | | | | | **...** | | | | | **Month X** | | | | |
| **1** | **2** | **3** | **4** | | **1** | **2** | **3** | **4** | | **1** | **2** | **3** | **4** | | **1** | **2** | **3** | **4** |
| Presentation of the proposal, strategy, methodology, schedule, budget |  |  |  |  | |  |  |  |  | |  |  |  |  | |  |  |  |  |
| Organization of working groups with beneficiaries |  |  |  |  | |  |  |  |  | |  |  |  |  | |  |  |  |  |
| Training implementation |  |  |  |  | |  |  |  |  | |  |  |  |  | |  |  |  |  |
| Review and adjustment of the business model proposals, and business plans of the innovators/entrepreneurs |  |  |  |  | |  |  |  |  | |  |  |  |  | |  |  |  |  |
| *Other activities* |  |  |  |  | |  |  |  |  | |  |  |  |  | |  |  |  |  |
| Final report of the consultancy. |  |  |  |  | |  |  |  |  | |  |  |  |  | |  |  |  |  |

**Timeframe:**

From <day> of <month> 20XX to <day> of <month> 20XX

**Consulting company profile:**

An institution that can demonstrate prior work experience in technical advice to entrepreneurship, desirable with vulnerable groups.

1. Knowledge and previous work in the geographic area that corresponds to this consultancy will be valued.
2. Knowledge and previous work with the target group/s corresponding to this consultancy will be valued.

## Professional training <level, discipline>.

## Have training and proven experience in the implementation of <types of business>.

1. Proficiency of <local language>

## The company must present the requested products within the established deadlines.

## Include staff resume

## Etc.

**Selection criteria**

|  |  |
| --- | --- |
| Criterion | Assessment |
| Technical quality of the proposal | <number> points |
| Specific experience of the objective of the call | <number> points |
| Work experience with vulnerable groups | <number> points |
| Economic offer | <number> points |
| Other criteria |  |
| Total | 100 points |

**Presentation of the Final Report**

The final report should include (*example*):

* Executive Summary
* Implementation process
* Methodology
* Achievements
* Challenges and lessons learned
* recommendations
* Annexes (example):
  + Training attendance record
  + Tabulation of attendance and evaluations of satisfaction of workshops
  + Some testimonials from beneficiaries
  + Entrepreneurs database
  + Business plans
  + Photographic report of the process.
  + Etc

**Contract and obligations (***example***):**

The consulting company will sign a contract between all the parties involved and obligations for the advance and for the faithful fulfilment of the contract. The details will be specified at the time of signing the contract.

**Way to pay (***example***):**

The consulting company will receive <number> payments, after the delivery of products:

**First payment** for the <XX%>, will be canceled <number> business days after signing the contract and receiving the following documentation:

* Work proposal that includes (*example*):
* Implementation strategy
* Methodology
* Product delivery schedule
* Materials to be used in the trainings: PowerPoint and photos of materials
* Training satisfaction evaluation form, to be completed by the beneficiaries
* Etc.

**Second payment** for <XX%> will be canceled <number> working days after delivery of the following products (*example*):

* Entrepreneurs database
* Training report on business ideas for <number> entrepreneurs from <area(s)>. Include attendance records, workshop satisfaction evaluations, convocation, testimonials from beneficiaries
* Draft of <number> viable business models.

One **last payment** for the <XX%> will be canceled <number> working days after the presentation of the following products (*example)*:

* Final report of the consultancy, including <number> business models, and all the annexes mentioned in the presentation of the final report.

For this last payment, an evaluation of the work presented by the consulting company should be carried out by the team of the <National Society>. For all payments, the acceptance certificate of all the corresponding deliverables must be attached, which will have been reviewed by the Unit of <responsible unit> of the National Society.

*(Example)*

It is the responsibility of the consulting firm to cover its own costs of <rental or use of venues, materials, snacks for participants, virtual spaces, mobilization…> and any other item that is necessary for the provision of the service.

**Copyright**

The copyright and other property rights over the documents where the work carried out is reflected, with the exception of those elements contained therein on which there is already copyright or other property right, will belong to the National Society of <country>.

**Technical and Economic Proposal**

The provider will be invited from the mail <xxx@xxx.xx >. The supplier must send any questions or request any clarification until <day>from <month> of <20XX> at <hour> hours (Time of <time zone>) to this same email. Questions or clarification will be answered until <day>from <month> of <20XX> at <hour> hours (Time of <time zone>).

The technical and economic proposal must be sent by mail in non-editable documents, solely and exclusively to the mail <xxx@xxx.xx >. The offer must be sent with the subject (example): <*number> Entrepreneurship training*

**Indicate in the body of the email:**

* Application Number and Name: <*number> Entrepreneurship training*
* Your company name
* Number of emails that are sent (example: 1/3, 2/3, 3/3).

The email with the offer must be received no later than <day>from <month> of <20XX> at <hour> hours (Time of <time zone>).

Documents that must be delivered to support the consulting offer:

* Technical proposal: work plan, execution strategy, methodology, product delivery schedule, materials and formats that will be used in the training sessions.
* Economic offer: must include the total price of the consultancy, including taxes, supported by a breakdown of the main items:
* Cost of service
* Logistical costs (if applicable): for example, use of classrooms, internet, snacks for participants, materials to be used in trainings, communication, accommodation of trainers, mobilization of trainers, provision of services or others for the achievement of the products.

**NOTE**(*example*): These expenses of logistics costs must be justified through a financial report with its corresponding invoices that the consultant must provide.

* Presentation letter
* Staff resume
* Certificates that demonstrate experience in the identification of business ideas and implementation of ventures.

**Process calendar**

|  |  |
| --- | --- |
| Quote Request Number and Name | *<number> Entrepreneur training* |
| RFQ Release Date | <day> of <month> of <20XX> |
| [Deadline for the supplier to send questions or clarifications to the mail:](mailto:Fecha%20límite%20para%20que%20el%20proveedor%20envíe%20preguntas%20o%20clarificaciones%20al%20correo:%20estefania.silva@ifrc.org) <xxx@xxx.xx >. | the <day> of <month> of <20XX>until <hour> hours (Time of <time zone>) |
| Day of answering questions or clarifications to suppliers | the <day> of <month> of <20XX> until <hour> hours (Time of <time zone>) |
| Deadline date and time for submitting offers to the mail:[XXX](mailto:panama.bidreceiving@ifrc.org) | the <day> of <month> of <20XX> until <hour> hours (Time of <time zone>) |
| Estimated date of communication of the result of the process | the <day> of <month> of <20XX> until <hour> hours (Time of <time zone>) |
| Start of the consultancy | <day> of <month> of <20XX> |

**Prepared by: <**Name/Unit**>**

**Date:** <day> of <month> of <20XX>

1. If it were a contest, it could be added, for example: “The ventures will be chosen by (proposal selection committee) depending on your business plan ”or another formula that suits the selection criteria. [↑](#footnote-ref-1)
2. In your case [↑](#footnote-ref-2)