

## **Request for Proposal (RFP)**

### **Business advisor training and expert cloud accounting services**

Date: 01 October 2018

#### **Subject: Request for Proposal**

TechnoServe Inc. (TNS) – South Africa, invites your company to participate in this competitive solicitation for pricing, delivery and terms of potential sale on the following service for the TNS office in South Africa.

#### **INTRODUCTION**

TechnoServe is an independent, non-governmental organization that provides professional support to emerging farmers and SMME's.

#### **BACKGROUND**

Technoserve has been appointed by Anglo American, through their EDS initiative, Zimele, to build the capacity of businesses and youth in the communities around Anglo Mines and Processing plants. The programme will be delivered through business development hubs and the activities will consist of structured training and mentorship across three pillars: Supplier Development, Enterprise Development and Youth Development. Technoserve will set up, staff and run the hubs that will serve the Supplier, Enterprise and Youth target groups. The Hubs will also be responsible for creating links with employers and procurement organisations for the beneficiaries. The contracted KPIs for the programme include steep targets around job creation, employment (of youth), business growth and local procurement. The programme will roll out across 11 mining communities over a period of four years.

Through the roll-out of entrepreneurship support hubs across the country, our programme is targeting high potential entrepreneurial businesses. These entrepreneurs operate on or around mining sites as suppliers to the mines or as business owners in the mining eco-system. It is important that these entrepreneurs are supported with appropriate advice and expertise to build sustainable, growing businesses that can create economic growth, employment and impact in these local communities.

The first step towards building a strong support ecosystem is to ensure that the Hub managers and Business advisors in these hubs are well equipped with knowledge, skills and the latest tools to effectively support and grow entrepreneurs and enterprises in their area.

## GENERAL REQUIREMENTS & SCOPE OF WORK

Technoserve requires a service provider for the following services:

1) Prepare the material and present to Business advisors and Hub staff a **Masterclass / workshop on Business and Financial Analysis and Advisory services** (expected duration of 2 days) and including step by step guidelines, tools and appropriate templates. The outcome of this training should be that all business advisors are equipped to take entrepreneurs / business owners through a structured process of business diagnostic and analysis. The advisors should, after the training be equipped to:

- Identify the key gaps in the business and entrepreneur/ business owners' skills
- Do and interpret financial analysis to give an informed opinion on the financial health of the business
- Prioritise the interventions that are required and identify which interventions should be conducted inhouse by the business, require external interventions or support and which require the support of the business advisor
- Develop a diagnostic report
- Develop a stabilisation and growth strategy and plan for the business

The training should at least include, for Business analysis, modules on Financial statement analysis, business risk analysis, compliance analysis, management report analysis and business model analysis. For Advisory services, modules should include at least scale-up methodology, optimisation, finance readiness and financial technology.

Provide the quotation in a format where the cost for material development is split from the delivery of training costs, with the expectation that material development cost is once-off and the delivery may be repeated events.

2) Prepare the material and present a **Masterclass on the latest and best Business Technology tools** that can be used to build work class and technology savvy entrepreneurs. The purpose of this material is to equip business advisors with the latest knowledge on technology solutions to optimise various functions in an SME. These should typically include communication tools, project management tools, accounting

packages, payroll packages, point of sales software, procurement tools, productivity improvement tools, vehicle tracking, warehousing and stock control, to name but a few.

The training should at least include

- Financial technology (eg. cloud accounting, paperwork digitisation, staff expense claims, dashboard reporting, cash flow forecasting, payroll management and inventory management),
- Marketing and sales technology (including networking and on-line marketing, lead generation, sales pipeline management and client engagement) and
- Business operations technology (eg. document sharing, time keeping and project management)

Provide the quotation in a format where the cost for material development is split from the delivery of training costs, with the expectation that material development cost is once-off and the delivery may be repeated events.

3) Provide outsourced financial management and cloud accounting services for SMEs on an ad hoc basis, which can be offered as an additional service and at a fee to the beneficiary businesses on the programme. This service can also include tax support services. Please note that these services may not be awarded exclusively to a single service provider.

## PERIOD OF PERFORMANCE

Activity	Deliverable	Timeframe	Payment schedule
Development of training material	Training Manuals		
Delivery of training	Completed workshops	2 days	
Cloud accounting	Entrepreneurs' financial reports	Ad hoc basis	

## CRITERIA FOR SELECTION

The evaluation of each response to this RFP will be based on the requirements set out in the solicitation.  
**At the sole discretion of TNS, the top proposals may be selected for follow-up questions.**

Preference will be given to bidders with the following:

Business Advisor Training

- Illustrated / proven inhouse knowledge and capability to develop the material and deliver
- Capacity to deliver
- Track record
- Innovation
- Creative approach
- Blended learning
- Compelling training syllabus
- Competitive pricing
- Qualified and resourceful human resources

#### Cloud Accounting services

- User-friendliness
- Ease of access
- Scalability
- Data sharing and security

The following weighting and points will be assigned to the proposal for evaluation purposes:

Technical Proposal – 45% Project Approach/Methodology Quality of Work Plan Project Deliverables	45
Management Proposal – 25% Consultant Qualifications and Experience Compliance(Company Reg/Tax Clearance/BEE)	25
B-BBEE compliance level (considering black ownership and black woman ownership) 10%	10
Cost Proposal – 20%	20
<b>TOTAL</b>	<b>100 POINTS</b>

TechnoServe reserves the right to award the contract to the organization whose proposal is deemed to be in the best interest of TNS and the Donor.

The Organization with the winning proposal will be notified in writing. Those who were not selected may or may not be notified, at the sole discretion of TNS.

## **TERMS AND CONDITIONS**

1. The Request for Proposal is not and shall not be considered an offer by TechnoServe.
2. All responses must be received on or before the date and time indicated on the RFP. All late responses will be rejected.
3. All unresponsive responses will be rejected.
4. All proposals will be considered binding offers. Prices proposed must be valid for entire period provided by respondent.
5. All awards will be subject to TNS contractual terms and conditions and contingent on the availability of donor funding.
6. TNS reserves the right to accept or reject any proposal or cancel the solicitation process at any time, and shall have no liability to the proposing organizations submitting proposals for such rejection or cancellation of the request for proposals.
7. TNS reserves the right to accept all or part of the proposal when award is provided.
8. All information provided by TNS in this RFP is offered in good faith. Individual items are subject to change at any time, and all bidders will be provided with notification of any changes. TNS is not responsible or liable for any use of the information submitted by bidders or for any claims asserted therefrom.
9. TNS reserves the right to require any bidder to enter into a non-disclosure agreement.
10. The bidders are solely obligated to pay for any costs, of any kind whatsoever, which may be incurred by bidder or any third parties, in connection with the Response. All responses and supporting documentation shall become the property of TNS, subject to claims of confidentiality in respect of the response and supporting documentation, which have been clearly marked confidential by the bidder.

## **FORM/CONTENT OF RESPONSE**

All proposals shall:

1. Be in the English language.
2. Description of proposed approach no longer than 7 pages, excluding CVs and budget. Candidates must also provide an example piece of work.
3. Detailed budget – including projected travel and accommodation and subsistence costs with applicable Tax clearly identified.
4. Up-to-date CVs of “key personnel” and a description of the qualifications, experience and capabilities of the company in providing the type of services being request by this RFP.
5. Include a contact name, email address, and telephone number to facilitate communication between TNS and the submitting organization.
6. A brief outline of the organization and services offered, including:
  - Full legal name, jurisdiction of incorporation and address of the company

- Full legal name and country of citizenry of company's President and/or Chief Executive Officer, and all other officers and senior managers of the company
- Year business was established

## **SCHEDULE OF EVENTS**

1. Questions regarding this request may be addressed to Leida Schuman, Program Director, on **010 880 2489** or via email at [lschuman@tns.org](mailto:lschuman@tns.org).
2. Responses to the RFQ should be addressed to the attention of Elsie Mahanyele, Procurement Manager at [emarshall@tns.org](mailto:emarshall@tns.org) and Sheila Garakara, Program Finance Manager at [sgarakara@tns.org](mailto:sgarakara@tns.org) no later than Monday the 8<sup>th</sup> October 2018.

End of RFP