



**Selection of Consultants**

**Technical Assistance Mission**

**Basic Finance and IT Training for**  
**Board of Directors**

**for BIMAS**

Kenya

March 2015

**With the Support of**



No. BIMAS/1&2/2015/KEN/AF

# Letter of Invitation

Kigali, March 3, 2015

Dear Sir or Madam:

1. The Grameen Credit Agricole Foundation (hereinafter called ‘the client’) has received funding (hereinafter called “the funds”) from the French Development Agency (hereinafter called “the Agency”) toward the financing partly the cost of Technical Assistance mission in the framework of the African Facility and intends to apply a portion of the funds to eligible payments under the contract for which this Request for Proposals is issued.
2. The Foundation now invites proposals to provide the following consulting services: Basic Finance and IT Training for Board of Directors. More details on the services are provided in the Terms of Reference.
3. This Request for Proposal (RFP) has been addressed to the following short-listed Consultants: CONFIDENTIAL
4. A firm will be selected under selection based on consideration of quality and cost (SBQC) and procedures described in this RFP.
5. The RFP includes the following documents:
  - Section 1 - Letter of Invitation
  - Section 2 - Instructions to Consultants (including Data Sheet)
  - Section 3 - Technical Proposal - Model Forms
  - Section 4 - Financial Proposal - Model Forms
  - Section 5 - Terms of Reference
6. Please inform us upon receipt:
  - (a) that you received the Letter of Invitation; and
  - (b) whether you will submit a proposal alone or in association.

Yours sincerely,

*Kathrin Gerner, Senior Expert for Eastern and Southern Africa*

## Instructions to Consultants

### DATA SHEET

Paragraph Reference	
1.1	Name of the Client: <u>Grameen Credit Agricole Microfinance Foundation represented by Kathrin Gerner, Senior Expert for Eastern and Southern Africa</u>  Method of selection: <u>selection based on consideration of quality and cost (SBQC)</u>
1.2	Designation, objectives and brief description of the assignment are as follows: <u>Basic Finance and IT Training for Board of Directors</u>
1.3	The Client will provide the following inputs and facilities: <u>Board manual and other relevant documents</u>
2.1	Clarifications may be requested not later than <u>2</u> days before the submission date.  The address for requesting clarifications is: <u>Kathrin Gerner, P.O. Box 3512, Kigali, Rwanda</u> <u>Tel: +250 784 11 74 14</u> <u>E-mail: kathrin.gerner@gmail.com</u>
3.1	Proposals shall be submitted in the following language: <u>English</u>
3.3 (i)	The estimated number of professional staff-months required for the assignment is: <u>2 training days</u>
3.3 (ii)	The minimum required experience of proposed professional staff is: <u>5 years of experience in Board training for microfinance institutions</u>
3.3 (iii)	Reports that are part of the assignment must be written in the following language(s): <u>English</u>
3.4 (vii)	Training is a major component of this assignment: <u>Yes</u>
3.8	Consultants shall state their price component for cost incurred in Euro and if necessary in local currency. Consultants who intend to incur cost in other

	currencies for the assignment may state the corresponding price component in Euros.
<b>3.10</b>	Proposals must remain valid 60 days after the submission date.
<b>4.3</b>	Consultant must submit an electronic version of the Proposal.
<b>4.5</b>	The Proposal submission address is: <u>kathrin.gerner@gmail.com</u> and <u>ami.faciliteafricaine@credit-agricole-sa.fr</u>  Proposals must be submitted no later than the following date and time: <u>March 17, 2015, 5:00pm EAT</u>
<b>5.1</b>	The address for contacting the Client is: <u>Kathrin Gerner, P.O. Box 3512, Kigali, Rwanda</u> <u>Tel: +250 784 11 74 14</u> <u>E-mail: kathrin.gerner@gmail.com</u>
<b>6.1</b>	Address for contract negotiations: <u>Kathrin Gerner, P.O. Box 3512, Kigali, Rwanda</u> <u>Tel: +250 784 11 74 14</u> <u>E-mail: kathrin.gerner@gmail.com</u>
<b>7.2</b>	Expected date and location for commencement of consulting services: <u>April 1, 2015</u>

# **Terms of Reference**

## **A. BACKGROUND AND RATIONALE**

Business Initiatives and Management Assistance Services (“BIMAS”) started in 1992 as a Micro-Enterprise Development Program (MED-P) of PLAN International. To ensure continuity of the program, PLAN decided to spin-off the MED-P into an independent institution. This gave birth to BIMAS, which was incorporated in June 1994 as a company limited by guarantee with the legal status of NGO. BIMAS targets mainly rural working poor and now serves close to 12,000 clients. Based in Embu, BIMAS has grown over the years and currently has 20 branches in 4 provinces: Eastern, Central, Rift Valley and Nairobi.

BIMAS’s Board is currently lacking the expertise in Finance and IT it needs to govern the institution as it works toward achieving its ambitious growth goals.

## **B. OVERALL OBJECTIVE**

The overall objective of the training is to equip ENCOT’s Board of Directors with a basic understanding of Finance and IT topics relevant to a growing MFI.

## **C. SPECIFIC OBJECTIVES**

1. Conduct a training needs assessment for BIMAS’s Directors in the areas of Finance and IT.
2. Develop training content and relevant instructional materials for the training (trainers’ guide and hand-outs)
3. Deliver the training to the trainees Directors.

## **D. DELIVERABLES**

1. Training report
2. Signed attendance sheet
3. Participant training evaluation
4. Training presentation

## **E. LOCATION**

The training needs assessment, preparation of content/materials and the final report can be done remotely. The actual training shall be conducted in Embu.

## **F. TIMEFRAME**

The training shall take place on April 1 and 2, 2015. Final deliverables shall be submitted to the client no later than April 30, 2015.