

## TERMS OF REFERENCE (TOR)

Project title: **Building Forward Better: Post-COVID Recovery of Ukraine's MSMEs towards Resilience and Sustainability**

**Description of the assignment:** Conduct a short-term interdisciplinary distance training for women-managed agri-food sector MSMEs with component of individual consulting/coaching support for the selected training program graduates in integrating SDGs to their business models and practices.

**Country / Place of implementation:** Kyiv, Ukraine

**Possible travels (if applicable):** n/a

**Starting date of assignment:** August, 2021

**The term of the assignment/or end date (if applicable):** 4 months

**Supervisor's name and functional post:** Maksym Boroda, Project Manager

### I. PREAMBLE

The socio-economic impact of the COVID-19 pandemic has deepened the challenges faced by SMEs. Necessary measures to contain the virus through quarantines, travel restrictions, and cities' lockdown have resulted in a significant reduction in demand and supply. SMEs provide work for more than 4 million people in Ukraine and generate about 20% of GDP. Nevertheless, since the lockdown, the Ukrainian Chamber of Commerce and Industry estimated that 700,000 SMEs have closed. One-third of business owners (mainly micro-entrepreneurs) have claimed a 90-100% drop in revenue since quarantine and have laid off up to 50% of staff.

According to UNDP's socio-economic impact assessment (SEIA) in Ukraine, women who are the owners of a business were more likely to indicate that they had experienced "significant changes" in their business during the pandemic than men owners (64% vs 53%). The pandemic severely impacted women and entrepreneurs who are younger than 40 years old: 79% of women entrepreneurs reported negative effects of the crisis vs 68% of men, and 80% of young entrepreneurs vs 68% of older ones. In 2019, women-owned enterprises had a lower annual financial turnover than men-owned ones: 66% of enterprises owned by women had an annual turnover of less than UAH 1 million compared to 48% of men owners. During the pandemic, women owners indicated a decrease in their enterprise's monthly turnover more often than men owners (84% vs 78% male). The smaller the enterprise, the more likely it was owned by a woman. Micro and small enterprises were most affected as they depended on self-financing to mitigate the crisis.

In order to address the challenges mentioned above, the Project builds on the results of situation analysis and UNDP's experience and applies its efforts to the following areas:

- Support to small and medium entrepreneurship as one of the core economic lynchpins of Ukraine's economy, with particular attention to gender equality, empowerment and digital transformation.
- Search for tipping points in the application of digital transformation instruments to expedite business recovery.
- Commitment to furthering SDGs to address COVID-related threats.

The Project will target MSMEs in the agri-food and adjacent sectors with a focus towards women-owned or women-managed businesses: both family-operated and larger producers that have potential for development and guide their business towards better resilience and sustainability.

The Project intends to achieve the following outputs:

1. Women-driven MSMEs in agri-food and adjacent sectors have better capacity to apply resilient and sustainable business-models.
2. Ukraine's MSMEs, particularly those owned/led by women and representing agri-food and adjacent sectors, enjoy better access to business-development services, local and global markets and finances.

### **OVERALL OBJECTIVES AND TASKS**

The overall objective is to raise the awareness of women - MSME leaders in the agri-food sector about the best innovative management practices in the sector through several interrelated processes: short-term distance learning, consulting support to each of the Project's participants in accelerating their own businesses with implementation of innovative sustainable business models (120 participants), administration of a competitive program among the participants to receive individual consulting support for the practical implementation of the developed project (40 participants).

This will require the following:

- conduct a selection campaign to attract 120 participants to the training program. This will require development of selection criteria, and their concurrence by UNDP, reaching out to the target group, and a selection of best participants among at least 200 candidates;
- study typical challenges faced by MSMEs of selected participants, and develop a training plan aimed at developing leadership skills and professional competence of women - leaders of MSMEs in the agri-food sector for overcoming the challenges with the help of innovative business tools;
- Streamline the training process such as to be of the most practical and applied nature, and build it around the development of a realistic Project ensuring sustainability of their own business with the help of modern business tools. This will require arrangements for a coaching process by the Contractor for the training participants;
- administer an internal competition among participants for the best 40 projects to accelerate their own businesses with implementation of innovative sustainable business models, the winners of which will receive consulting / coaching support for the implementation of developed projects.

The training program should only assume distant learning.

## **II. SCOPE OF WORK AND EXPECTED OUTCOMES**

### **GENERAL PRINCIPLES FOR THE DEVELOPMENT AND IMPLEMENTATION OF THE TRAINING PROGRAM**

- The training program should be based on the principles of adult learning, and be aimed at developing practical skills of the participants, who will further use them in development of their own businesses.
- The program should be based on a competency-based approach to learning. The program should particularly address development of skills and competencies that will help participants function as leaders, members of supervisory boards, executive directors, etc.
- The training should combine theories and methodologies based on relevant processes and skills, and highlight specific cases and practices.
- The program should include possibilities and specific facilities / events to help learn and implement best Ukrainian and international practices of operation and development of agri-food MSMEs: lectures, meeting with Ukrainian and international experts, representatives of leading Ukrainian and international companies in the agri-food sector.

- The program should allow for, and encourage practices of mutual learning through the exchange of experiences between participants of the program (peer learning).
- Training modalities to be used by the Contractor may include distant leaning, coaching, mentoring, etc., as long as it ensures the use of knowledge in practice.

Under the UNDP Project Manager's supervision and in coordination with the Project Team, the Contractor will accomplish the following activities:

### **1. The initial stage. Announcement of the training program, registration and selection of participants.**

The Contractor shall develop and agree with UNDP a description of the training concept, draft training plans and announcements of the training program.

The Contractor shall announce a training program for three groups of the target audience, women - managers of agri-food enterprises, forming the groups according to the duration of business experience:

- Women with up to 3 years of experience in managing small businesses in the agro-industrial sector – a Start Group.
- Women with 3 to 5 years of experience in managing small and medium-sized businesses in the agro-industrial sector - an Expansion group.
- Women with 5 years of experience in managing medium-sized enterprises in the agro-industrial sector – a Leadership Group

For the purpose of this Project, the following enterprises are deemed relevant to the agro-industrial sector: farming, food processing, and public catering.

The requirements for the participants of the selection process are the following:

- applicants should demonstrate their readiness to develop and implement a model of accelerating their own business with implementation of innovative sustainable business models;
- applicants can submit only one application and participate in only one training;
- it is desirable to have equal participation of women from different regions.

The Contractor shall develop and agree with UNDP the system of selection criteria for participants. The Contractor shall select participants in strict accordance with the system approved by UNDP.

Outcome:

- Announcements in Ukrainian developed and agreed upon with UNDP, with general details about the training, its objectives, business school, and other relevant information;
- An electronic resume of the raining program (up to 1 page) with details about the program, schedule trainers, and registration process;
- An online registration form developed based on open platforms and agreed upon with UNDP;
- The training registration was conducted during at least 20 calendar days, information was widely spread using Internet resources aimed at the target audience of entrepreneurs in the agri-food sector (at least 5 websites, the list of which is pre-agreed with UNDP), targeted advertising on Facebook (at least 7 days and 1500 views). UNDP will place advertisements and links to the online registration form on official UNDP resources;

- A selection system for participants of the training developed. The system should envisage a transparent facility/system of evaluation for the selection of participants (120 finalists with at least 200 applications) and an optional waiting list (at least 50 people) who are motivated to develop their own businesses using modern business tools (through questionnaires or other effective tools as offered by the Contractor). The selection approach should be approved by UNDP. A list of 120 participants, together with a waiting list of at least 50 additional candidates, should be submitted to UNDP for approval:
  - The Start group - 60 participants.
  - The Expansion group - 35 participants.
  - The Leadership group - 25 participants.
- The selection of participants was done strictly in accordance with the system approved by UNDP. The Contractor received approval from UNDP at each stage of selection. Regret letters sent to all applicants not selected for participation in the trainings. The wording of the letter should be agreed upon with UNDP;
- Lists of selected and rejected participants should be handed over to UNDP;
- Equal access to the training for people with disabilities duly ensured, and a regional balance of participants taken into consideration.

## **2. Development of an intensive distance learning program for business development, taking into account the goals and expected outcomes**

The Contractor shall accomplish the following:

- Conduct a survey of selected participants to better understand both the individual needs in training, and the priority needs of each of the three training groups. For this purpose, develop and agree with UNDP a survey questionnaire, analyze the results obtained from the survey, and provide a brief summary report (up to 3 pages A4 in Ukrainian);
- Based on the survey, develop and agree with UNDP the final training methodology, revise the draft training plan and detailed project implementation plan as appropriate, including an outline of the tools that will be used for this task;
- Develop a program and detailed schedules for training of each of the training groups;
- Develop pre- and post-training tools to assess learning outcomes, achievement levels and participant satisfaction.

The training program should cover, but not limited to the following subjects:

- Business development strategy;
- Marketing and development of an in-house brand;
- Finances and access to funding;
- Development of cooperative forms of coworking;
- Legal bases of protection and development of business;
- Innovative agricultural technologies;
- Innovative food processing and food production technologies;

- Sustainable development.

The Contractor should incorporate the following cross-cutting issues in all trainings: sustainable business models, the benefits of sustainable development, and the prominent role of business in achieving the Sustainable Development Goals.

The training plan for each of the three raining groups should be based on different levels of management competencies and personal experience in management positions:

- for the Start group, trainings should ensure a basic level on proposed educational subjects with a dominating focus not on theory, but on simple and effective tools for business optimization: cost reduction and sales expansion;
- for the Expansion group, trainings should strengthen existing entrepreneurial skills and business success. The focus is on strategic business development, innovation in products, services or processes, and access to new markets;
- for the Leadership group, trainings are aimed at the development of leadership and management focus, understanding of the best world practices of agro-industrial enterprise development, cluster models, value chains, and principles of sustainable development

The minimum training outcomes should be as follows:

- Strengthen the organizational, managerial and marketing skills of women entrepreneurs;
- Assist in acquiring the skills needed to access grants and loans provided by various financial institutions and technical assistance programs for women-led agri-food enterprises;
- Help in understanding advantages of cooperative forms of coworking between enterprises in the agro-industrial sector.
- Help in understanding benefits of sustainable development.
- Provide an understanding of the benefits of using modern digital and innovative tools to increase the efficiency of agri-food enterprises.
- Participants who completed the entire training and passed the assessment provided by the contractor, received a certificate of advanced training.

Outcomes:

- A finalized report, explaining the final approach to the assignment, the methodology of its implementation, including a training plan, competencies and experience of trainers, detailed training schedules and expected dates of trainings for each group
- A list of evaluation indicators developed on the basis of training modules for the self-assessment study before / after training, and agreed upon with UNDP;
- A list of questions prepared further to the evaluation indicators for self-assessment study before / after training, and agreed upon with UNDP for further implementation;
- Finalized detailed plans for each training agreed upon with UNDP;

- Information and handouts for training contain the following elements: multimedia presentations in MS PowerPoint (at least 15 slides to every webinar), materials for practical tasks in MS Word (at least 3 A4 pages to every webinar), other multimedia materials, information materials and graphics that will be used in the course of the training. The format and the content of handouts are designed by the Contractor in accordance with requirements, which are provided by UNDP, and agreed upon with UNDP. All materials contained the logos of the United Nations Development Program and donors are provided by UNDP.

### **3. Conduct of an intensive distance learning program on business development**

#### **3.1 Distance learning in groups**

Distance learning of each of the three groups will take place over three-month period with the total of 18 webinars for each group (one webinar is at least 1.5 hours of learning content and half an hour of moderated discussion / Q&A session).

UNDP approves the distance learning platform proposed by the Contractor. Contractor provides initial and ongoing technical support to participants for its use.

After each webinar, participants should receive presentation materials and access to the webinar record.

The information materials and presentations should be developed such as to meet the needs of the target audience and contain quality visualization, graphics, and be clear and easy to understand. All materials should include the relevant logos of UNDP and donors to be provided by UNDP.

Handouts should be developed for each of the training subjects, and should include short step-by-step instructions on use of the knowledge to be obtained from the training, and templates of documents that participants should be able to finalize themselves (e.g. templates of regulations, financial and marketing plans, etc.).

Requirements for the team of trainers and training modalities:

- For coordination of all activities under the Project, a Project manager should be appointed to function as a focal point on all Project-related issues with the contact person from UNDP.
- Teaching methods specialist should be appointed to coordinate all administrative aspects of the Project, manage the trainers, and communicate with the participants.
- A dedicated coordinator should be appointed for each of the three training groups.
- The information materials and presentations should be developed such as to meet the needs of the target audience and contain quality visualization, graphics, and be clear and easy to understand. All materials should include the relevant logos of UNDP and donors to be provided by UNDP.

Participants who manage to complete all assignments from the training plan, and actively participate in training practice should be able to obtain a certificate of advanced training.

Outcome:

- A total of 18 online trainings delivered to the participants from each of the three groups (1.5 hour webinar and half an hour of moderated discussion or Q&A session);
- A video of at least one complete training course of one group recorded. The recorded materials should be edited and should be compiled in separate training videos (one for each session), all having the same format, containing the relevant logos of the United Nations Development Program and donors, and having quality

clear sound. The full rights for further use of the training videos should be transferred to UNDP. Written permissions for the video recording and further use of the video content should be obtained from each trainer and handed over to UNDP. During the training no video records should be made of the participants, training in groups, and presentation of individual plans;

- The lists of participants with the screenshots from the learning platform to confirm the actual number of participants from each webinar should be sent to UNDP within 2 days after the end of each training.
- Information and handouts distributed among the participants;

### **3.2 Open webcasts with leading speakers.**

There will be open webcasts with participation of leading speakers, where the participants from each group of the Project will have a possibility to communicate with them on-line, while a wider audience of entrepreneurs from the agro-industrial sector will be able to follow them. Such meetings should be moderated by the Contractor, and the speakers participating in them should represent stakeholders of particular value for the agro-industrial MMSEs: managers (owners) of large businesses, leaders of agro-industrial business associations, representatives of innovative startups, representatives of large chain retailers working with small producers. At least 2 such meetings are expected each month of the training scheduled such as to not overlap with the days of the distant learning. The Contractor should seek agreement with UNDP on each speaker to be proposed for these meetings

Outcome:

- at least 6 open webcasts with leading speakers delivered to the participants, where the participants from all groups of the Project had a possibility to communicate with them on-line, while a wider audience of entrepreneurs from the agro-industrial sector were able to follow them.

## **4. Coaching on preparation of a personal business acceleration project with implementation of innovative sustainable business models, and conduct of an internal competition among the projects**

The coaching process is interlinked with the learning process and runs in parallel with distant trainings. It is important that the training and coaching be scheduled such that the teams participating in design of development strategies could have answers to their common questions during the remote trainings.

Starting from the second month of training, in parallel with theoretical and practical classes, each participant start developing/improving a personal sustainable business development project. The Contractor will make sure that each participant will have a coach-consultant in design of the personal project. One coach will support no more than 20 participants. The coach will conduct personal remote meetings with each participant on development of their personal projects at least 2 times a month (each meeting lasting 1 hour in distant format).

The Contractor will develop criteria for quality assessment of participants' personal projects and agree them with UNDP.

At the end of the tenth week, the participants should be able to present and defend their personal project before an expert council. The Contractor should form the expert council from trainers, and speakers to be involved in the training process, and UNDP representatives. Based on the agreed project assessment criteria and results of the expert council the Contractor will rate and identify the 40 best projects while ensuring that participants from all 3 training groups are duly represented in proportion to the total number of participants among the 40 best projects.

Outcomes:

- Each project participant supported by a personal coach in preparation of a personal business acceleration project with implementation of innovative sustainable business models and use of modern business tools for at least 6 hours;
- Each participant given an opportunity to present their project to the audience, received feedback and participated in a group discussion on her project;
- The Contractor developed criteria for the evaluation of participants' projects by an Expert Council, formed the Expert Council and agreed its composition with UNDP;
- Each participant given an opportunity to present their project to the expert council for selection. The Contractor conducting the rating in line with the developed criteria and identified 40 winners, who were proportionally represented by participants from all training groups.

## **5. Individual consulting on the implementation of a personal project to accelerate own business with integration of innovative sustainable business models**

The Project aims to achieve the realization in practice of projects to accelerate own businesses with implementation of innovative sustainable business models developed by 40 winners of the internal competition. For this purpose, the Contractor will provide practical individual counseling by educators, coaches and experts to each of the participants - winners of the competition for two months.

To implement the counseling component, the Contractor should develop an individual consultation plan with each of the 40 winners which will include at least the following:

- Identified areas of counseling;
- Schedule and timing of consultations, the duration of each consultation;
- Educator or expert responsible for the specific consultation direction.

Individual counseling plans are approved by UNDP. The total amount of practical individual counseling for each of the 40 winners of the competition is 5 days (40 hours) of counseling.

The coordination of consulting work is carried out by the coordinators of the groups which during the training included the winners of the competition.

The Contractor determines a minimum of 5 leading experts in the provision of consulting services, who should have at least 3 years of practical experience in the following areas of providing consulting services:

- Marketing and expansion of sales channels;
- Efficient / Lean manufacturing (e.g. the lean production model)
- HR management;
- Internal and external communication;
- Sustainable development based on digital transformation.



Prior to the consultation process, the Contractor agrees upon with UNDP on a form of weekly reporting on the consultations provided and a format for confirming the fact of the consultation conducted (e.g. recording of online consultation, a copy of written consultation, etc.).

Outcomes:

- Each Project participant was provided with individual consulting support for the practical realization of the project to accelerate their own businesses with implementation of innovative sustainable business models by educators and experts, provided by the Contractor, in the amount of 5 days (40 hours) of consulting;
- The Contractor has developed and agreed upon with UNDP an individual consultation plan for each participant;
- The Contractor agreed upon with UNDP a form of weekly reporting on the consultations provided, a format for confirming the fact of consultation conducted and provided weekly reports during the implementation of the counseling support component.

## **6. Information support by the Contractor of the training program for BO leaders.**

The information events should draw attention of a range of stakeholders to the challenges in development of leadership skills and professional competence among women – owners and leaders in the agri-food sector. The planning for the information events should be agreed upon with UNDP. A range of activities should include the following as a minimum:

- 6.1 Two online conferences for the interested audience: at the beginning of the recruitment of participants, and upon completion of the training program. The online conferences will be conducted in cooperation with UNDP Project communication specialist;
- 6.2 Promoting public webinars on social networks and sites, the target audience of which are representatives of agri-food MMSEs: at least 5 websites (the list of which is pre-agreed with UNDP), targeted advertising on Facebook (at least 7 days and 1,500 views).

## **7. Final stage.**

The Contractor should analyze all stages of the project. The Contractor should also identify best practices that UNDP can use further. The Contractor should describe risks that were not identified at the start, and describe how their negative impact was mitigated.

Outcome:

- A Final narrative report which includes a short summary of activities and results, lessons learned, recommendations for further development of the programme and conclusions (up to 50 pages, single spacing, Myriad Pro font, size 11) submitted in Ukrainian language with a summary (up to 20 pages, single spacing, Myriad Pro or Arial font, size 11) in English language. A final report submitted to, and accepted by UNDP. The report should contain, but not limited to, the following; final report submitted to, and accepted by UNDP. The report should contain, but not limited to, the following;
  - Details of participants, broken down by age and territory, summarized for all trainings;
  - Results of pre- and post-training evaluation, their synthesis and analysis. Evaluation forms and initial data should be provided by UNDP;
  - Records with feedback from the participants about the training;

- Recommendations for further action in improving the professional competence of women - owners of the agri-food MSMEs.

## **FINAL DELIVERABLES AND TENTATIVE TIMELINE:**

The Contractor shall provide the following:

Deliverable 1) A schedule reflecting key areas and milestones as expected from the Contractor -- 5 days after signing of the contract;

Deliverable 2) A training plan with a detailed description of courses, specifying teachers, speakers and experts, a schedule of distant trainings, and coaching (Gant chart) – 20 days after signing of the contract. Prepare self-assessment questionnaires allowing every participant to assess the level of their competence before and after each series of training sessions, and have the questionnaires approved by the UNDP project -- 14 days after signing of the contract;

Deliverable 3) Announce the program among the relevant target audience. Hold the first online conference with a presentation of the Project. The system for selection of participants developed and approved by UNDP. Participants recruited;

Deliverable 4) The first interim work progress report – within 30 days after signing of the contract;

Deliverable 5) The participants surveyed for individual needs in training. The final training methodology, training plan and project implementation plan agreed with UNDP based on the survey results. Pre- and post-training tools to assess learning outcomes, achievement levels and participants' satisfaction developed.

Deliverable 6) The distant group training conducted for three groups of participants;

Deliverable 7) Open webcasts with participation of leading speakers, allowing participants from each group of the Project to communicate with them on-line, while being followed by a wider audience of agro-industrial entrepreneurs conducted. Arrangements made for the expert council for evaluation of projects, projects rated, and 40 best projects identified;

Deliverable 8) The coaching in preparation of personal business acceleration projects with implementation of innovative sustainable business models and internal competition among projects;

Deliverable 9) Educators and experts, provided by the Contractor, developed and agreed upon with UNDP an individual plan of consulting support of each of the 40 winners of the competition on the practical implementation of the project to accelerate their own businesses with implementation of innovative sustainable business models;

Deliverable 10) The second interim work progress report – within 75 days after signing of the contract;

Deliverable 11) Administration of consulting support of 40 winners of the competition by educators and experts provided by the Contractor;

Deliverable 12) The final online conference with presentation of results of the Project conducted;

Deliverable 13) The final report— by the end of 4 months after signing of the contract;

The assignment shall be completed by **the end of 4 months after signing of the contract.**

#### **IV. MONITORING AND REPORTING REQUIREMENTS**

The Contractor shall submit the following reports in line with the format and recommendations by UNDP. The format of the reports should be agreed upon at the first stage of the contract implementation, though UNDP reserves the right to make further amendments to, and clarifications on the format of the report.

The Contractor shall submit the reports to the Project Manager.

The Contractor shall comply with the monitoring, evaluation, and quality control implemented by the UNDP. All necessary information, reports, statistics, electronic and paper version of the reports should be prepared and submitted for clearance by UNDP according to a preliminary determined schedule or as quickly as possible (within the agreed period).

Upon completion of deliverables 1-4, the Contractor will submit to UNDP the first Interim report containing a summary of works performed, and results achieved thus far, particularly, expected interim results.

Upon completion of deliverables 5-10, the Contractor will submit to UNDP the second Interim report containing a summary of works performed, and results achieved thus far, particularly, expected interim results.

Upon completion of all deliverables, the Contractor will submit to UNDP the final report containing a summary of works performed, and final results.

All reports and results are to be submitted to UNDP in electronic form (\*.docx, \*.xlsx, \*.pptx, and \*.pdf or other formats accepted by UNDP). The language of reports is Ukrainian.

#### **V. EXPERIENCE AND QUALIFICATION REQUIREMENTS**

- An officially registered educational establishment (university; business school and other educational organizations);
- At least 7 years of experience in provision of educational services assuming issue of an official and recognized diploma/certificate;
- At least 5 years of experience in development and provision of specifically tailored short-term training programs for entrepreneurs. Experience in training programs for the agro-industrial sector will be an asset;
- Experience in consulting projects for organizational development of MSMEs (at least 2 successfully completed projects). Experience in a consulting project for the agro-industrial sector will be an asset;
- Availability of references to experience in development of training plans for short-term and medium-term training of target groups, arrangements for distant training, consultancy and coaching with focus on practical results (at least 2 reference letters from previous customers/clients/partners reflecting the nature of projects implemented, their results and the role of the Contractor).
- Relevant experience in working with the international organizations (at least one project);
- Requirements for the project team members:

##### **Team leader / Project manager**

1. Master's/Specialist's degree in marketing, communications, economics, finance, law, management, business administration, public administration, social sciences, or another related field;
2. At least 5 years of experience in project management and / or leading of teams that provided regular or special training for managers of commercial organizations;

3. At least 5 years of experience in consultancy on drafting of strategic plans for development of commercial organizations;
4. Proven experience in consultancy or development of training programs for the agri-food sector will be an asset;
5. Fluency in Ukrainian / Russian, upper intermediate English;

#### **Teaching methods specialist**

1. Master's/Specialist's degree in marketing, economics, finance, law, management, business administration, organizational management, social sciences, public administration, or another related field;
2. At least 5 years of experience in drafting of training plans for business-oriented training;
3. Fluency in Ukrainian / Russian, upper intermediate English.

#### **Group coordinator (3 persons):**

1. Master's/Specialist's degree in marketing, communications, economics, finance, law, management, business administration, public administration, social sciences, or another related field;
2. At least 5 years of experience in drafting of training plans for business-oriented training;
3. Proven personal experience in consultancy for commercial organizations. Experience in consultancy the agri-food sector will be an asset.
4. Fluency in Ukrainian / Russian.

### **VI. DOCUMENTS TO BE SUBMITTED WITH THE TECHNICAL APPLICATION:**

- A letter of proposal, specifying previous experience in implementing similar programs and competitive advantages of the applicant company;
- A work plan with the proposed work schedule identifying persons responsible for each area of activities;
- A communication strategy and plan for spread of information on the training program through various media channels;
- A description of communication means for contacts with applicants at the registration stage and at the project implementation stage;
- A brief description of the registration process of and selection of participants;
- A training program evaluation procedure, including reporting facility and quality assurance efforts;
- A resume of 5 members of the project team, including information on past experience in similar projects / assignments;
- A resume of 5 leading experts in the provision of consulting services, who should have at least 3 years of practical experience in providing consulting services in the following areas:
  - Marketing and expansion of sales channels;
  - Efficient / Lean manufacturing (e.g. the lean production model);
  - HR management;
  - Internal and external communication;

- Sustainable development based on digital transformation.
- At least 3 recommendation letters from previous clients / partners, demonstrating the nature of completed projects, their results and the role of the company;
- **DOCUMENTS TO BE SUBMITTED WITH THE APPLICATION**
  - ☒ Technical proposal (see more details below)
  - ☒ Financial proposal, as a separate password-protected file (see more details below)

## TECHNICAL PROPOSAL

### Required

- ☒ Submission forms, dully filled in and signed as per the template provided in attachments to the application;
- ☒ A detailed description of approach to the assignment: 1) concepts to be used in the training plan for the short-term remote training with focus on practical application of knowledge and skills in daily work, particular courses in each module, and a summary of each course; 2) concepts for coaching to be provided by the Contractor's consultants in drafting of sustainability assurance plans by each participant (up to 10 pages);
- ☒ A work plan with the proposed work schedule identifying persons responsible for each area of activities;
- ☒ A training program evaluation procedure, including reporting facility and quality assurance efforts;
- ☒ A description of communication means for contacts with applicants at the registration stage and at the project implementation stage;
- ☒ A brief description of the registration process of and selection of participants;
- ☒ A communication strategy and plan for spread of information on the training program through various media channels;
- ☒ References to, or summaries of previous successfully completed projects (at least 2 references to clearly demonstrate relevancy, scope of work and Contractor's results);
- ☒ At least two recommendations from previous clients clearly indicating services provided and their relevancy to the current tender;
- ☒ CVs of the project team members with clear demonstration of how the relevant qualification requirements are met, and functions of each member in the proposed team structure.

## VII. PROPOSED PAYMENT SCHEDULE:

Payments for the Contractor's services will be made in 4 instalments upon completion of the following tasks

- 20% of the total contract amount to be paid upon completion of Deliverables 1-4, and approval of the first interim report by UNDP.

- 70% of the total contract amount to be paid upon completion of Deliverables 5-10, and approval of the second interim report by UNDP.
- 10% of the total contract amount to be paid upon completion of Deliverables 11-13, and approval of the final interim report by UNDP.

## VIII. EVALUATION CRITERIA

An evaluation and comparison of proposals.

A two-stage procedure is utilized in evaluating the proposals, with the evaluation of the technical proposal being completed prior to any price proposal being opened and compared. The price proposals will be opened only for submissions that passed the minimum technical score of 70% (or 490 points) of the obtainable score of 700 points in the evaluation of the technical proposals.

In the First Stage, the technical proposal is evaluated on the basis of its responsiveness to the Terms of Reference (TOR) and as per the below Evaluation Criteria.

In the Second Stage, the price proposals of all offerors, who have attained a minimum 70% score in the technical evaluation, will be reviewed. Overall evaluation will be completed in accordance with the cumulative analysis scheme, under which the technical and financial aspects will have pre-assigned weights on 70% and 30% of the overall score, respectively. The lowest cost financial proposal (out of technically compliant) will be selected as a baseline and allocated the maximum number of points obtainable for financial part (i.e. 300). All other financial proposals will receive a number of points inversely proportional to their quoted price; e.g. 300 points x lowest price / quoted price.

The winning proposal will be the one with the highest number of points after the points obtained in both technical and financial evaluations, respectively, are added up. The contract will be devoted to the bidder that submitted the winning proposal.

### Technical Evaluation Criteria

Summary of Technical Proposal Evaluation Forms		Score Weight	Points Obtainable	Company / Organization			
				A	B	C	D
1	The expertise of the company/organization submitting the Proposal	30%	210				
2	Proposed Approach, Methodology and Work Plan	45%	315				
3	Personnel and external experts / consultants	25%	175				
	<b>Total Score</b>	<b>100%</b>	<b>700</b>				
	<b>Notes</b>						

Technical evaluation forms are provided on the next pages. The maximal points obtainable per each criterion indicate the relative importance or score weight in the general evaluation process.

### Technical Proposal Evaluation Forms:

Form 1. The expertise of the company/organization submitting the proposal

Form 2. Proposed Work Plan, Methodology and Approach

Form 3. Personnel and external experts / consultants

### Technical Evaluation Criteria for UNDP ToR

Technical Proposal Evaluation Form 1		Points Obtainable	Company / Organization		
			A	B	C
The expertise of the company/organization submitting the proposal					
1.1	An officially registered educational establishment (university, business school, and other educational organization): 7-8 years – 35 points, more than 8 years – 40 points.	40			
1.2	At least 5 years of experience in development and provision of specifically tailored short-term training programs for entrepreneurs: 5-6 years – 40 points, 7-8 years – 45 points, 9 years and more – 50 points, available experience specifically for the agro-industrial entrepreneurs – additionally up to 10 points.	60			
1.3	Experience in consulting projects for organizational development of MSMEs (at least 2 successfully completed projects): 2 projects – 45 points, 3 projects and more – 50 points, available experience specifically for the agro-industrial sector – additionally up to 10 points.	60			
1.4	Relevant experience with international organization over the past 5 years: - at least one assignment completed: 35 points; - 2-3 assignment completed: 40 points; - 4 or more assignments completed: 50 points	50			
The total score on Form 1		210			

Technical Proposal Evaluation Form 2		Points Obtainable	Company / Organization		
			A	B	C
Proposed Work Plan, Methodology and Approach					
2.1	The quality of the proposed methodology to be used in preparation of the training plan for the distant short-term training, and its compliance with the stated goals of the TOR:	90			

	<ul style="list-style-type: none"> <li>- The training plan is based on an internationally-recognized methodology and complies with the principals of training for adults – 30 points;</li> <li>- The proposed courses, trainings, meetings with experts are in line with the goals and objectives of the training, and are described in details in the proposal – 30 points;</li> <li>- The methodology is based on elements enabling the participants to quickly implement the knowledge and skills in daily operations – 20 points;</li> <li>- The methodology assumes approaches and tools for evaluation of whether the training and application of skills in practice is efficient – 10 points;</li> </ul>				
2.2	<p>The quality of the proposed approach and methodology to be used by the Contractor's consultants in coaching on drafting of sustainability assurance plans by each participant:</p> <ul style="list-style-type: none"> <li>- The concept is appropriately tailored to the needs of the target audience - 30 points;</li> <li>- The proposed methodology and approach are focused on drafting of practically sustainability assurance plans - 20 points;</li> <li>- The coaching methodology includes elements enabling innovative approaches to the use of modern digital innovative business tools – up to 10 points;</li> </ul>	60			
2.3	<p>Work plan and timelines:</p> <ul style="list-style-type: none"> <li>- A work plan is well elaborated and feasible and includes visualized work schedule – 30 points;</li> <li>- Work plan envisages all the activities and deliverables outlined in ToR – 20 points;</li> <li>- Key activities in the work plan developed in the optimal sequence – up to 20 points;</li> <li>- The webinars are logically placed in line with the objectives of this ToR addressing the specifics of training for groups with different basic competence – up to 15 points;</li> </ul>	85			
2.4	<p>The communication strategy for spread of information about the training program:</p> <ul style="list-style-type: none"> <li>- Active advertising of public webinars on social networks and sites, the target audience of which are representatives of agri-food MMSEs, was suggested – 20 points</li> </ul>	20			



2.5	<p>A system of feedback and communication with applicants:</p> <ul style="list-style-type: none"> <li>- The proposed approach includes a telephone hotline, and describes its methodology, schedule and specifics in details – 10 points;</li> <li>- The tool for registration of participants assumes an online format as well as fast registration, identification of repeated applications, assigning of status to each application, possibility of automatic replies to participants, and buildup of a database and mailing lists – 10 points;</li> </ul>	20			
2.6	<p>An approach to selection of participants:</p> <ul style="list-style-type: none"> <li>- The proposed approach to selection of participants is clear and transparent, sufficiently details its methodology – 10 points;</li> <li>- The participant selection method is justifiable and realistic, complies with the objectives of the program, and allows an assessment of a participant's potential – 10 points;</li> </ul>	20			
2.7	<p>A procedure for evaluation of the training program by participants:</p> <ul style="list-style-type: none"> <li>- The proposed evaluation procedure contains a detailed description of how to assess the level of knowledge and skills of students before and after the trainings and the ability of the Contractor to analyze in detail and establish the results of the training – 10 points;</li> <li>- The proposed reporting schedule is realistic and in line with the established timeline – 10 points;</li> </ul>	20			
<b>The total score on Form 2</b>		<b>315</b>			

	Technical Proposal Evaluation Form 3	Points Obtainable	Company / Organization		
			A	B	C
Personnel and external experts / consultants					
	Team leader / Project manager				
3.1	Experience in project management and/or leading of teams that provided regular or special training for leaders of commercial organizations (5 years – 5 points, 6 years and more – 10 points);	10			
3.2	Experience in consultancy on drafting of strategic plans for development of commercial organizations (5 years – 5 points, 6 years and more – 10 points);	10			

3.3	At least Master's/Specialist's degree in marketing, communications, economics, finance, law, management, business administration, public administration, social sciences, or another related field (Master's/Specialist's degree – 5 points, PhD or above – 10 points);	10			
3.4	Fluency in Ukrainian/Russian, knowledge of English (English upper intermediate – 3 points, fluent English – 5 points);	5			
<b>Interim score by criteria 3.1-3.4</b>		<b>35</b>			
<b>Teaching methods specialist</b>					
3.5	Experience in drafting of training plans for business-oriented training (3 years – 10 points, 4-5 years – 15 points, 6 years and more – 20 points);	20			
3.6	At least Master's/Specialist's degree in marketing, economics, finance, law, management, business administration, organizational management, social sciences, public administration, or another related field (Master's/Specialist's degree – 5 points, PhD or above – 10 points);	10			
3.7	Fluency in Ukrainian/Russian, knowledge of English (English upper intermediate – 3 points, fluent English – 5 points);	5			
<b>Interim score by criteria 3.5-3.7</b>		<b>35</b>			
<b>Start group coordinator</b>					
3.8	Experience in drafting of training plans for business-oriented training (5 years – 5 points, 6 years and more – 15 points);	15			
3.9	Experience in consultancy for commercial organizations: none – 0 points, general – 5 points, consultancy experience in the agro-industrial sector – 10 points;	10			
3.10	At least Master's/Specialist's degree in marketing, communications, economics, finance, law, management, business administration, public administration, social sciences, or another related field (Master's/Specialist's degree – 3 points, PhD or above – 5 points);	5			
3.11	Fluency in Ukrainian/Russian	5			
<b>Interim score by criteria 3.8-3.11</b>		<b>35</b>			
<b>Expansion group coordinator</b>					
3.12	Experience in drafting of training plans for business-oriented training (5 years – 5 points, 6 years and more – 15 points);	15			

3.13	Experience in consultancy for commercial organizations: none – 0 points, general – 5 points, consultancy experience in the agro-industrial sector – 10 points;	10			
3.14	At least Master's/Specialist's degree in marketing, communications, economics, finance, law, management, business administration, public administration, social sciences, or another related field (Master's/Specialist's degree – 3 points, PhD or above – 5 points);	5			
3.15	Fluency in Ukrainian/Russian	5			
	<b>Interim score by criteria 3.12-3.15</b>	<b>35</b>			
	<b>Leadership group coordinator</b>				
3.16	Experience in drafting of training plans for business-oriented training (5 years – 5 points, 6 years and more – 15 points);	15			
3.17	Experience in consultancy for commercial organizations: none – 0 points, general – 5 points, consultancy experience in the agro-industrial sector – 10 points;	10			
3.18	At least Master's/Specialist's degree in marketing, communications, economics, finance, law, management, business administration, public administration, social sciences, or another related field (Master's/Specialist's degree – 3 points, PhD or above – 5 points);	5			
3.19	Fluency in Ukrainian/Russian	5			
	<b>Interim score by criteria 3.16-3.19</b>	<b>35</b>			
	<b>The total score on Form 3</b>	<b>175</b>			

## Financial Proposal Form <sup>1</sup>

The Proposer must prepare the Financial Proposal in an envelope separate from the rest of the RFP as indicated in the Instruction to Proposers.

The Financial Proposal must provide a detailed cost breakdown. Provide separate figures for each functional grouping or category.

Any estimates for cost-reimbursable items, such as travel and out-of-pocket expenses, should be listed separately.

In the case of an equipment component to the service provider, the Price Schedule should include figures for both purchase and lease/rent options. UNDP reserves the option to either lease/rent or purchase outright the equipment through the Contractor.

The format shown on the following pages is suggested for use as a guide in preparing the Financial Proposal. The format includes specific expenditures, which may or may not be required or applicable but are indicated to serve as examples.

### A. Cost Breakdown per Deliverables\*

No	Deliverables as referred to in the TOR	Percentage of Total Price (Weight for payment)	Amount excl. VAT, currency	VAT, currency (if applicable)	Amount including VAT, currency
1.	The schedule reflecting key areas and milestones as expected from the Contractor				
2.	The training plan with a detailed description of courses				
3.	The announcement of the program among the relevant target audience. Conduct of the first online conference. The recruitment of participants				
4.	The survey of the participants for individual needs in training				
5.	The first interim work progress report				
6.	The distant group training for three groups of participants				
7.	The open webcasts with participation of leading speakers				
8.	The coaching in preparation of personal business acceleration projects with implementation of innovative sustainable business models and internal competition among projects				

<sup>1</sup> No deletion or modification may be made in this form. Any such deletion or modification may lead to the rejection of the Proposal.

9.	An Individual plan of consulting support of each of the 40 winners of the competition by educators and experts provided by the Contractor				
10.	The second interim work progress report				
11.	Administration of consulting support of 40 winners of the competition by educators and experts provided by the Contractor				
12.	The final online conference with presentation of results of the Project				
13.	The final report				
	Total, currency	100%			

*\*Basis for payment tranches*

### **B. Cost Breakdown by Cost Component:**

The Proposers are requested to provide the cost breakdown for the above given prices for each deliverable based on the following format. UNDP shall use the cost breakdown for the price reasonability assessment purposes as well as the calculation of price in the event that both parties have agreed to add new deliverables to the scope of Services

No	Activity/Costs	Unit	Number	Cost per unit, currency	Amount, currency excl. VAT	VAT, currency (if applicable)	Amount including VAT, currency
1	<b>Personnel</b>						
1.1	<i>Team leader</i>	month	12				
1.2	<i>Specialist</i>	month					
1.3	<i>Coordinator 1</i>	month					
1.4	<i>Coordinator 2</i>	month					
1.5	<i>Coordinator 3</i>	month					
1.6	<i>Others (specify as necessary)</i>						
2	<b>Training process</b>						
2.1	<i>A conduct of distant group training for 120 women-entrepreneurs (3</i>	1 webinar	54				

	<i>groups, 18 webinars 1,5 hour long for each group)</i>						
2.3	<i>Direct variable costs per 1 participant (personal training materials, stationary, etc.)</i>	per 1 person	120				
2.5	<i>Distant meetings with speakers (group webinars at least two times per month 1.5 hour long with open broadcasting on social networks)</i>	1 meeting	6				
<b>3</b>	<b>Coaching on drafting of business sustainability assurance plans by participants</b>						
3.1	<i>Constant consulting support to each of the Project's participants in drafting of business sustainability assurance programs (120 participants, 6 hours per participant)</i>	1 hour	720				
<b>4</b>	<b>Consulting support of the winners of the internal competition</b>						
4.1	<i>Individual consulting support of 40 winners of the competition in the amount of 5 days (1 day - 8 hours, a total of 40 hours for each participant)</i>	1 day	200				
<b>5</b>	<b>Other expenses (to be specified)</b>						

	Total, currency			
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