

FINANCIAL SECTOR DEEPENING UGANDA

Request for Proposals

For

Learning Partner for the Digital Platform Economy

Procurement Reference Number: FSDU/SRVC/2023/00077.

March 2023

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20 March 2023

Dear Sir/Madam,

RE: Letter of invitation

1. Financial Sector Deepening (FSD) Uganda would like to procure consultancy services for a Learning Partner for the Digital Platform Economy
2. FSD Uganda invites consulting firms to submit electronic proposals for the provision of the above services.
3. Bidding will be conducted in accordance with the method of restricted tendering
4. You may obtain further information through the email address: procurement@fsduganda.or.ug from 8:00 am to 4:00pm for a period of three working days from the date of issue of this Request for Proposal (RFP).
5. The firm should explicitly demonstrate an understanding of the terms of reference and the assignment.
6. Proposals must be electronically delivered to the email address below **at or before 4:00 PM East Africa Time (EAT)** on 7 April 2023. Late proposals shall be rejected. Email: procurement@fsduganda.or.ug
7. Documents will be issued:
 - (a) Through the email address provided in 4 and 6 above.
 - (b) Proposals must be electronically delivered to: procurement@fsduganda.or.ug
8. Clarifications may be requested through the email address in 4, 6 and 7(b) above not later than three (3) working days from the date of issue of this RFP.
9. The planned procurement schedule (subject to changes) is as follows:

Activity	Date
A. Issue of invitation to bid letter	20 March 2023
B. Request for clarifications	Three (3) Working days from issue of RFP date (23 March 2023)
C. Proposal closing date	7 April 2023 at 3:00 PM EAT

Signature:



Lydia A. Muhangi
Chief Operations Officer

List of acronyms

BEB	Best evaluated bidder
BOU	Bank of Uganda
CV	Curriculum Vitae
EAT	East Africa Standard Time
FSD	Financial Sector Deepening
FSP	Financial Service Providers
KYC	Know Your Customer
M4P	Making Markets Work for the Poor
MRM	Monitoring and Results Measurement
MSMEs	Micro, Small and Medium Enterprises
RFP	Request for Proposal
SHF	Small Holder Farmers
TA	Technical Assistance
TORs	Terms of Reference

Part 1: Proposal Procedures

1.1 Section 1: Instructions to Consulting firms

Preparation of Proposals: You are requested to submit separate technical and financial proposals, as detailed below. The standard forms in this Request for Proposal may be retyped for completion but the Consultant is responsible for their accurate reproduction.

Preparation of Technical Proposals: Technical proposals should contain the following documents and information:

1. The Technical Proposal Submission Sheet;
2. A brief methodology for performing the services;
3. A detailed work plan, showing start date and completion date (showing key milestones) the inputs of all key staff and achievement of deliverables;
4. Copies of previous contracts of similar projects worked with in the past 6 years;
5. CVs of key staff; The key staff should have a minimum bachelor's degree or equivalent in Business, Economics, Finance/Banking, Statistics or any other relevant discipline.
6. A summary of your experience in similar assignments (for the company) which includes but not limited to:
 - Demonstrate understanding of the digital financial services and digitising Agricultural Value Chains, Trade/Services and Light Manufacturing Supply Chains
 - Capacity to carry out highly focused topical research and ability to prepare concise reports within potentially tight deadlines
7. The consultant's comments or suggestions on the terms of reference (TORs) and appreciation of the assignment – the objectives, tasks and deliverables.

Preparation of Financial Proposals: Financial proposals should contain the following documents and information:

1. The Financial Proposal Submission Sheet; and
2. A copy of the breakdown of Lump Sum Price form for each currency of your proposal, showing all costs for the assignment, broken down into fees, reimbursables and miscellaneous costs.

Validity of Proposals: Proposals must remain valid until 30 June 2023.

Submission of Proposals: Proposals should be electronically submitted to the email address below, no later than the date and time of the deadline below. The technical and financial proposals should be submitted in separate email attachments with the subject clearly specified with the Subject of procurement and its Reference Number above, and documents labelled either "Technical Proposal" or "Financial Proposal" as appropriate. The details in the email should state the consulting firm submitting the proposal. Any proposal received by FSD Uganda after the deadline for submission of proposals shall be declared late, rejected, and shall not be considered in subsequent stages of the procurement.

The financial proposal should be password protected. FSD Uganda shall request for the password at an appropriate time.

Date of deadline: 7 April 2023

Time of deadline: 3:00 pm EAT.

Email: procurement@fsduganda.or.ug

Opening of Proposals: The Technical Proposals will be opened by FSD Uganda.

Evaluation of Proposals: The **Quality based** evaluation methodology shall be used in the evaluation of the Proposals as detailed below:

1. Preliminary examination to determine eligibility (as defined below) and administrative compliance to this Request for Proposal on a pass/fail basis;
2. Detailed Technical evaluation will contribute 80%; and
3. Financial scores will be allocated 20% to determine the best evaluated bid. Proposals failing any stage will be eliminated and not considered in subsequent stages.

Eligibility Criteria: You are required to meet the following criteria to be eligible to participate in the procurement exercise:

1. have the legal capacity to enter into a contract;
2. not be insolvent, in receivership, bankrupt or being wound up or subject to legal proceedings for any of these circumstances;
3. not have had your business activities suspended;
4. have fulfilled your obligations to pay taxes;
5. have the nationality of an eligible (defined in the proceeding section) country; and
6. not to have a conflict of interest in relation to this procurement requirement.

Preliminary Examination of Eligibility: You are required to submit the following in order to be eligible to participate in the procurement exercise:

1. Certificate of Incorporation and any statutory licenses and or registrations where applicable)
2. A copy of the Bidder's current Trading Licence (2023) or equivalent and a copy of the Bidder's Certificate of Registration or an equivalent; and
3. Evidence of fulfilment of obligations to pay taxes (Transaction tax clearance certificate) (2023) or equivalent;

Administrative compliance criteria. The consulting firms must adhere to the following to be considered administratively compliant. This will be evaluated on a pass/fail basis:

1. Adherence to the bid validity period of 30 June 2023
2. Signed Code of Ethical Conduct in Business for Bidders and Providers;
3. Signed Technical proposal Submission Sheet;
4. Power of attorney registered with the registrar of documents if signed in Uganda or a notarised power of attorney if signed outside Uganda. If this is not available at the time of submitting a bid, a bidder might be requested to submit one if they emerge as the Best evaluated bidder (BEB), else FSD Uganda might enter into a contract with the second BEB ; and
5. Submission of a password protected financial proposal (soft or electronic copy).

Nationality of Personnel: All personnel employed under any resulting contract shall have the nationality of an eligible country to conduct business in Uganda.

All countries are eligible, unless as a matter of law or official regulation, the Government of Uganda prohibits commercial relations with that country or by an act of compliance with a decision of the United Nations Security Council taken under Chapter VII of the Charter of the United Nations, the Government of Uganda prohibits any import of Supplies from that country or any payments to persons or entities in that country.

Technical Criteria: Proposals shall be awarded scores out of the maximum number of points as indicated in below.

Evaluation Criteria	Marks
Significant experience (Consultant)	
Prior experience in conducting research and data analysis (at least 3 reference letters on previous assignments of related work as a learning partner)	10
- Demonstrable experience in providing monitoring and Evaluation, Research, documentation, knowledge management and learnings in digital financial services. - Extensive years of local experience in undertaking assignments on the digital financial services ecosystem in Uganda will be an added advantage.	10
Demonstrated engagement with Financial Service Providers (FSP) partners and actors especially in product design and refinement	5
Good understanding and experience in financial inclusion work	5
Sub Total	30
Team Composition	
Adequacy of the team Leader/ Lead consultant	
General qualifications The lead consultant or team leader must have a minimum of Master's degree or equivalent in Economics, Finance/Banking, Statistics, Development Studies, or any other relevant discipline	5
Suitability for the assignment - The team leader must have a minimum of 8 years' experience in conducting research and data analysis. - Demonstrated understanding of the digital financial services and digitising Agricultural Value Chains, Trade/Services and Light Manufacturing Supply Chains	15
Adequacy of the proposed experts	
General qualifications The proposed experts must have a degree or equivalent in Technology, Economics, Finance/Banking, Statistics, or any other relevant discipline.	10
Suitability for the assignment - The proposed experts must have a minimum of 5 years of experiences experience in conducting research and data analysis. - Demonstrated understanding of the digital financial services and agriculture, trade, and manufacturing financing.	10
Subtotal for the team Composition	40
Adequacy of Methodology & Work plan	

Evaluation Criteria	Marks
Technical Approach and methodology (demonstration of clear understanding of TORs and how to go about the assignment and deliver the key milestones)	20
Adequacy of the Work plan with clear timelines.	10
Sub-Total	30
Grand Total	100

Minimum technical score: The mark required to pass the technical evaluation is 75%

Financial Criteria:

Pricing information should not appear in any other section of the proposal other than the financial proposal.

Total scores: Total scores shall be determined using a weighting of 80% for technical proposals and a weighting of 20% for financial proposals.

Currency: Proposals should be priced in **United Stated Dollars** only. The currency of evaluation will be United States Dollars. Proposals in other currencies will be rejected.

Best Evaluated Proposal/Bid: The best evaluated bid shall be the firm with the highest technical score and shall be recommended for award of contract. FSD Uganda shall issue a Notice of Best Evaluated Bidder within two working days from the decision when the evaluation report is approved.

Post qualification: FSD Uganda shall determine to its satisfaction whether the best evaluated bidder/consultant is qualified to perform the contract satisfactorily, hence a post qualification may be undertaken. In the event the best evaluated bidder/consultant does not meet qualification evaluation criteria, the exercise shall be undertaken for the next best evaluated bidder/consultant.

Award of contract: Award of contract shall be by placement of an Agreement. FSD Uganda shall not award a contract to the best evaluated bidder/consultant until the lapse of five working days after the date of display of the Notice of Best Evaluated Bidder. However, FSD Uganda is at liberty to proceed if it has written acknowledgement of acceptance of FSD Uganda's final decision from the rejected bidders.

Right to Review: Consultants may seek administrative review from the Executive Director if they are aggrieved with the decision of FSD Uganda within the timeframe stipulated in the notification of bid award email.

Proposal preparation costs. Costs incurred in the preparation of the proposal shall be borne by the consultant. FSD Uganda is not bound to award the tender to the lowest bidder/consultant.

1.2 Section 2. Proposal Forms

Section A: Technical Proposal

1.2.1 Technical Proposal Submission Sheet

[Complete this form with all the requested details and submit it as the first page of your technical proposal, with the documents requested above attached. Ensure that your technical proposal is authorized in the signature block below. A signature and authorization on this form will confirm that the terms and conditions of this RFP prevail over any attachments. If your proposal is not authorized, it may be rejected.]

Proposal Addressed to:	FSD Uganda
Date of Technical Proposal:	
Procurement Reference Number:	
Subject of Procurement:	

I/We offer to provide the services described in the Statement of Requirements, in accordance with the terms and conditions stated in your Request for Proposals referenced above.

I/We confirm that I/we are eligible to participate in procurement and meet the eligibility criteria specified in Part 1: Proposal Procedures of your Request for Proposals.

I/We have signed and undertake to abide by the Code of Ethical Conduct for Bidders and Providers attached during the procurement process and the execution of any resulting contract;

My/Our proposal shall be valid until _____ *[insert date, month and year]* and it shall remain binding upon us and may be accepted at any time before or on that date;

I/We enclose a separately sealed financial proposal.

Technical Proposal Authorised By:

Signature: _____ Name: _____

Position: _____ Date: _____

(DD/MM/YY)

Authorised for and on behalf of:

Company: _____



Address:



1.2.2 CODE OF ETHICAL CONDUCT IN BUSINESS FOR BIDDERS AND PROVIDERS

1. Ethical Principles

Bidders and providers shall at all times-

- (a) maintain integrity and independence in their professional judgement and conduct;
- (b) comply with both the letter and the spirit of-
 - i. the laws of Uganda; and
 - ii. any contract awarded.
- (c) avoid associations with businesses and organisations which are in conflict with this code.

2. Standards

Bidders and providers shall-

- (a) strive to provide works, services and supplies of high quality and accept full responsibility for all works, services or supplies provided;
- (b) comply with the professional standards of their industry or of any professional body of which they are members.

3. Conflict of Interest

Bidders and providers shall not accept contracts which would constitute a conflict of interest with any prior or current contract with FSD Uganda. Bidders and providers shall disclose to all concerned parties those conflicts of interest that cannot reasonably be avoided or escaped.

4. Confidentiality and Accuracy of Information

- (1) Information given by bidders and providers in the course of procurement processes, or the performance of contracts shall be true, fair and not designed to mislead.
- (2) Providers shall respect the confidentiality of information received in the course of performance of a contract and shall not use such information for personal gain.

5. Gifts and Hospitality

Bidders and providers shall not offer gifts or hospitality directly or indirectly, to staff of FSD Uganda that might be viewed by others as having an influence on a government procurement decision.

6. Inducements

- (1) Bidders and providers shall not offer or give anything of value to influence the action of a public official in the procurement process or in contract execution.
- (2) Bidders and providers shall not ask a public official to do anything which is inconsistent with the Act, Regulations, Guidelines or the Code of Ethical Conduct in Business.

7. Fraudulent Practices

Bidders and providers shall not-

- (a) collude with other businesses and organisations with the intention of depriving FSD Uganda of the benefits of free and open competition;

- (b) enter into business arrangements that might prevent the effective operation of fair competition;
- (c) engage in deceptive financial practices, such as bribery, double billing or other improper financial practices;
- (d) misrepresent facts in order to influence a procurement process or the execution of a contract to the detriment of FSD Uganda; or utter false documents;
- (e) unlawfully obtain information relating to a procurement process in order to influence the process or execution of a contract to the detriment of the FSD Uganda;
- (f) withholding information from the FSD Uganda during contract execution to the detriment of the FSD Uganda.

I agree to comply with the above code of ethical conduct in business.

AUTHORISED SIGNATORY

NAME OF CONSULTANT

1.2.3 Consultant's References.

(Relevant services carried out in the last 6 years that best illustrate experience. Using the format below, provide information on each assignment for which the Consultant, either individually as a corporate entity or as one of the major companies within an association, was legally contracted.)

Consultant's Name:

Assignment name:		Country:
Location within country:		Professional Staff provided by consultant (profiles):
Name of client:		Number of staff:
Address:		Number of Staff-Months; Duration of assignment:
Start date (Month/Year):	Completion date (Month/Year):	Approx. Value of services (in Current US\$):
Name of Associated Consultants, if any:		No. of Months of Professional Staff provided by Associated Consultants:
Name of senior staff (Project Director/Coordinator, Team Leader) involved and functions performed:		
Narrative description of Project:		
Description of actual services provided by your Staff:		

1.2.4 Comments and Suggestions on the Terms of Reference.

[Comments and suggestions on the Terms of Reference that could improve the quality/effectiveness of the assignment.]

On the Terms of Reference

{Improvements to the Terms of Reference, if any}

1.2.5 Description of the Methodology for performing the Assignment.

A description of the approach, methodology and work plan for performing the assignment, including a detailed description of the proposed methodology.

{Suggested structure of your Technical Proposal}:

- a) Technical Approach and Methodology
- b) Work Plan
- c) Organization and Staffing

A. Technical Approach and Methodology. {Please explain your understanding of the objectives of the assignment as outlined in the Terms of Reference (TORs), the technical approach and the methodology you would adopt for implementing the tasks to deliver the expected output(s), and the degree of detail of such output. *{Please do not repeat/copy the TORs in here}*}

B. Work Plan. {Please outline the plan for the implementation of the main activities/tasks of the assignment, their content and duration, phasing and interrelations, milestones (including approvals by the Client), and tentative delivery dates of the reports. The proposed work plan should be consistent with the technical approach and methodology, showing your understanding of the TOR and ability to translate them into a feasible working plan. A list of the final documents (including reports) to be delivered as final output(s) should be included here. The work plan should be consistent with the Work Schedule Form.}

C. Organization and Staffing. {Please describe the structure and composition of your team, including the list of the Key Experts, Non-Key Experts and relevant technical and administrative support staff.}

1.2.6 Team Composition and Task Assignments.

1. Technical Staff		
Name	Position	Task(s)

2. Support Staff (where applicable)		
Name	Position	Task(s)

1.2.7 Format of Curriculum Vitae for Proposed Professional/technical Staff.**CURRICULUM VITAE (CV)**

Position Title and No.	{e.g., A-I, TEAM LEADER}
Name of Expert:	{Insert full name}
Date of Birth:	{day/month/year}
Country of Citizenship/Resid	

Education: {List college/university or other specialized education, giving names of educational

Employment record relevant to the assignment: {Starting with present position, list in reverse order. Please provide dates, name of employing organization, titles of positions held, types of activities performed and location of the assignment, and contact information of previous clients and employing organization(s) who can be contacted for references. Past employment that is not relevant to the assignment does not need to be included.}

Period	Employing organization and your title/position. Contact information for references	Country	Summary of activities performed relevant to the Assignment
[e.g., May 2005-present]	[e.g., Ministry, advisor/consultant to... For references: Contact Address		

Membership in Professional Associations and Publications:

Language Skills (indicate only languages in which you can work):

Adequacy for the Assignment:

Detailed Tasks Assigned on Consultant's Team of Experts:	Reference to Prior Work/Assignments that Best Illustrates Capability to Handle the Assigned Tasks
{List all deliverables/tasks as in TECH- 5 in which the Expert will be involved}	

Expert's contact information: (e-mail, phone)

Certification:

I, the undersigned, certify that to the best of my knowledge and belief, this CV correctly describes myself, my qualifications, and my experience, and I am available to undertake the assignment in case of an award. I understand that any misstatement or misrepresentation described herein may lead to my disqualification or dismissal by the Client, and/or sanctions by the Bank.

{day/month/year}

Name of Expert

Signature

Date

{day/month/year}

Signature

Name of authorized Date

Representative of the Consultant
(the same who signs the Proposal)

1.2.8 Estimated Time Schedule for Professional Staff. Activity (Work) Schedule.

[The information requested is required in the format provided below and should be included by the Consultant in its proposal. Consultants may reproduce this format in landscape format if more practical but are responsible for its accurate reproduction.]

Estimated Time Schedule for the Team

Name	Position	Task(s)	Years		No of Months
			1	2	
		•			
		•			
		•			
		•			
		•			
		•			

Full-time:

Part-time:

Signature: (Authorised Representative)

Full Name:

Consultant: -----

Section B: Financial Proposal

1.2.2 Financial Proposal Submission Sheet

[Complete this form with all the requested details and submit it as the first page of your financial proposal, with the documents requested above attached. Ensure that your proposal is authorized in the signature block below. A signature and authorization on this form will confirm that the terms and conditions of this RFP prevail over any attachments. If your proposal is not authorized, it may be rejected. The total price of the proposal should be expressed in the currency or currencies permitted in the instructions above.]

Proposal Addressed:	FSD Uganda
Date of Financial Proposal:	
Procurement Reference Number:	
Subject of Procurement:	

The total price of our proposal is: _____.

We confirm that the rates quoted in our Financial Proposal are fixed and firm for the duration of the validity period and will not be subject to revision or variation.

Financial Proposal Authorised By:

Signature: _____ Name: _____

Position: _____ Date: _____

(DD/MM/YY)

Authorised for and on behalf of:

Company: _____

Address: _____

—

Breakdown of Lump Sum Price

[Complete this form with details of all your costs and submit it as part of your financial proposal. Where your costs are in more than one currency, submit a separate form for each currency. Authorize the rates quoted in the signature block below.]

Procurement Reference Number: _____

CURRENCY OF COSTS: _____

FEES				
Name and Position of Personnel	Input Quantity	Unit of Input	Rate	Total Price
TOTAL:				

REIMBURSABLE AND MISCELLANEOUS COSTS				
Description of Cost	Quantity	Unit of Measure	Unit Price	Total Price
TOTAL:				

TOTAL FEES SHOULD BE INCLUSIVE OF VAT: _____

Breakdown of Lump Sum Price Authorised By:

Signature: _____ Name: _____

Position: _____ Date: _____

(DD/MM/YY)

Authorised for and on behalf of:

Company:

Part 2: Terms of Reference

1.0 Background

Financial Sector Deepening Uganda (FSD Uganda) is a company limited by guarantee promoting greater access and usage of appropriate financial services to reduce vulnerability to financial shocks, promote job creation and improve Uganda's competitiveness. FSD Uganda seeks to develop a more inclusive financial sector with a focus on low-income individuals (particularly women, youth, smallholder farmers and forcibly displaced people) and Micro, Small and Medium Enterprises (MSMEs). FSD Uganda supports product innovation, conducts research, helps to promote, and improve market infrastructure as well as policy, laws and regulations that shape the financial sector in Uganda. FSD Uganda's interventions are based on the "making markets work for the poor" (M4P) approach to change the way markets work, so that the poor are included in the benefits of growth and economic development. FSD Uganda is currently implementing activities under the Digital Economy, Digital Financial Services and Deal Flow Facility. FSD Uganda is currently funded by Bill & Melinda Gates Foundation, Mastercard Foundation and European Union.

1.1. Overview of the Digital Platform Portfolio

In its current strategy for the period 2021 – 2026, FSD Uganda is undertaking a platform approach in the execution of its strategy, seeking to leverage the economies of scale and scope possible with platforms and their capacity to mobilize and support various actors in different value and supply chains. The objective of the approach is to scale Financial Services through Digital Platforms Engaged in Digitising Agricultural Value Chains and Trade/Services and Light Manufacturing Supply Chains.

Research has shown that to sustainably reach and profitably serve Small Holder Farmers (SHF) and MSMEs, it takes a multi-partner approach. FSD Uganda considers that digital platforms are well-placed to efficiently bring together different partners to serve these market segments better and more affordably. In supporting this approach, FSD Uganda recognizes the perceived gender neutrality of digital platforms and intends to work with selected partners to build inclusive platforms which recognize the barriers and opportunities they present for low-income market segments particularly women. Such an approach is intended to enable women to take full advantage of the economic opportunities the platforms create and to strengthen platforms' business models.

2.0. Snapshot of Activities under the Platform includes but not limited to the following.

- Refinement and testing of credit algorithm for farmer groups to deploy data-driven financing decisions specific to digital agricultural credit products that could reduce cost of loans, increase transparency, and visibility, as well as efficiency. Additional metrics such as crop production data, predictive weather index data, and gender can improve the risk score for implementing partners and pre-set credit lines for targeted farmer groups/individual farmers.
- Deployment of existing digital financial literacy and women empowerment tools on mobile financial services, digital technology, and mobile inclusion to train and build capacity of smallholder farmers around digital technology access, affordability, accessibility, digital skills, and overcoming social barriers. This will help the implementing partners and farmers to have paperless operations, automated workflows, digital know your customer (KYC), seamless reporting, Inter-branching, Mobile money banking, SMS banking.
- Deployment of credits in digital agricultural capital bundled with weather index crop insurance to smallholder farmers particularly women.
- Piloting of value chain financing schemes using the same credit algorithm stated above, to involve partnerships with off takers and forward linkage players to form farmer groups comprising of smallholder farmers, hence building an agricultural loan portfolio that is value chain driven.

- Build in-house lending capacity of staff and regional teams of the implementing partners as well as the growing network of digital community agents who act as the key nodes in the delivery of digital financial services for farmer groups.

3.0. Objectives of contracting a Learning Partner for the Digital Platform

Financial Sector Deepening Uganda (FSDU) seeks the services of a consulting firm for the role of research and learning partner as part of its ongoing project under the digital platform. The Learning partner (consulting firm) will not only be a reference point on impact measurement but also work with implementing partners in the digital platform space to document learning insights, test hypotheses, investigate research questions, as well as develop key learnings from project implementation.

4.0. Scope of work

As stated in the methodology and deliverables section, the prospective consulting firm will work with the implementing partners under the digital platform space to advance the interest of FSD Uganda in **building strong and sustainable partnerships in the platform economy to deliver profitable, affordable, and inclusive quality financial services to SHFs and MSME owners**. This can only be achieved if the following is accomplished: -

- Develop a learning framework to cover key components – a Theory of Change, complete with assumptions, research questions, and indicators for routine project output monitoring. The learning framework will also provide high level guidance on how insights obtained from the research will be applied.
- Provision of Technical Assistance (TA) to the implementing partners on how to document and report impactful stories under the digital platform.
- Produce engaging learning documents to provide insights to the players in the digital platform ecosystem, donors, and other stakeholders. This will cover communications assets that will be generated and will include, but not limited to presentations, development and updates dashboard, infographics, PowerPoint, blogs, reports, videos, pictorials etc.
- Document and provide feedback to the platform businesses and participants on the financial products/ services and how they may be tweaked to improve its usage and undertaking.

5.0. Methodology

The methodology to be used under this platform engagement will be anchored on the following. However, the learning partner (consulting firm) may suggest an additional and appropriate methodology to be used.

- a) Frequently meet with intervention Managers operationalizing the different projects under the platform economy, FSD Uganda and the specific digital platforms/technology providers and understanding the pilot project approaches, milestones, deliverables, locations etc. The team will also meet with other learning partners under the financial inclusion ecosystem the FSD Uganda monitoring and results measurement (MRM) and communications teams.
- b) Developing necessary tools to be used at baseline, case studies, end-line, reviews, and any necessary studies under the platforms. This will ensure flexibility and responsiveness to both FSDs and the FSPs' needs.
- c) Identifying individual respondents (SHF and or MSMEs households for the studies)
- d) Identifying enumerators to collect raw data from the selected SHFs and MSMEs. Collect and analyze this data to provide information to be used by the users/beneficiaries and stakeholders.
- e) Provide supporting information in various formats for consumption by different stakeholders through varied communication mediums (e.g., reports, infographics, blogs, videos etc.)
- f) Provide an additional but relevant approach that complements the above that the Consultant deems suitable to arrive at the above deliverables. The Consultant will discuss the methodology with FSD Uganda.

5.1. Deliverables

It is envisioned that the engagement shall be able to deliver the following concrete outputs.

- a) An inception report including planned activities and timelines and work plan, detailed methodology/ approach, planned key and valued collaborative stakeholders, sampling frame, data collection methods, analysis tools (qualitative and quantitative protocols for data collection and analysis).
- b) Quarterly report/findings (regular updates and field operations).
- c) Documentation of lessons learned, Success stories and or stories of change (Most Significant stories).
- d) Case studies with insightful recommendations for scale up and replication.
- e) Editable raw material for institutional knowledge replication.
- f) Pictures and videos where necessary.
- g) Any information deemed necessary (Success factors) to improve the operation of the implementing partners under the digital platform.

6.0. Eligibility

Eligible firm of choice must possess the following:

- Must be a Legally registered firm: (Certificate of Incorporation and any statutory licenses and or registrations where applicable)
- Must be a firm with demonstrable experience in providing monitoring and Evaluation, Research, documentation, knowledge management and learnings in digital financial services.
- Extensive years of local experience in undertaking assignments on the digital financial services ecosystem in Uganda will be an added advantage.

7.0. Confidentiality

In a bid to protect the integrity of the prospective firms, all information contained in this TOR is provided on a strictly confidential basis, solely for the use of bidders about competition for the supply of services for the above assignment. It is a condition of this competition that prospective consulting firm shall:

- Take all reasonable measures to protect confidentiality and avoid the unauthorized use, disclosure, publication, or dissemination of confidential information.
- Not to use this information other than for the purposes of preparation of a technical and financial proposal
- Not disclose, publish, or otherwise reveal any of the information contained herein except with specific prior written authorization of FSD Uganda
- Not that FSD Uganda holds all rights to the images and footage.

8.0. Timeframe

The contractual engagement between FSD Uganda and the prospective consultant shall run for two (2) years from commencement of the assignment.

9.0. Reporting

The Prospective consultant will report directly to Director of Programs. However, he will work closely with Impact Lead and Agriculture and MSMEs Finance Lead at FSD Uganda.

10.0 Submission of the proposal

Eligible and interested consultant(s) are hereby invited to electronically submit their technical and financial proposals. These should be sent to the procurement Team, Financial Sector



Deepening Uganda, no later than 7 April 2023. The email address for submission of proposal is: procurement@fsduganda.or.ug



Part 3: Proposal Checklist

Complete this form with all the requested details and submit it as the second page after the technical proposal Submission sheet of your technical proposal. Kindly populate the check list and ensure that it is signed off by the authorized representative.

Checklist for Proposal Submissions (to be completed and returned with the technical proposal)		
Name of Bidder:		
Description of requirements	Submission status (Yes/No)	Comments
Eligibility requirements (Consulting firms)		
Certificate of Incorporation or an equivalent.		
A copy of the Bidder's current Trading Licence (2023) or equivalent and a copy of the Bidder's Certificate of Registration or an equivalent.		
Evidence of fulfilment of obligations to pay taxes (Transaction tax clearance certificate) (2023) or equivalent		
Administrative requirements		
Adherence to the bid validity period of 30 June 2023		
Signed Code of Ethical Conduct in Business for Bidders and Providers;		
Power of attorney registered with the registrar of documents if signed in Uganda or a notarised power of attorney if signed outside Uganda. if this is not available at the time of submitting a bid, a bidder might be requested to submit one if they emerge as the Best evaluated bidder (BEB), else FSD Uganda might enter into a contract with the second BEB.		
Submission of a password protected financial proposal.		
Signed Technical proposal Submission Sheet.		
Proposal submission requirements		
Technical proposal		
Financial proposal (Password protected)		
Notes		
If for any reason, a requirement has not been provided, kindly provide a reason why it has not been provided.		

Technical Proposal Authorised By:

Signature: _____ Name: _____



Position: _____ Date: _____

(DD/MM/YY)

Authorised for and on behalf of:

Company: _____

Address: _____

