

**INCLUSIVE FINANCE CONFERENCE 2023  
PROGRAM PLANNING AND MANAGEMENT, CONTENT DEVELOPMENT, AND FACILITATION  
SERVICES.**

**TERMS OF REFERENCE**

## **1. INTRODUCTION**

### **1.1 About the Organization**

Established in 2004, the Financial Sector Deepening Tanzania (FSDT) is a donor-funded financial sector market facilitator that aims to achieve poverty reduction through a transformative financial sector that offers inclusive and sustainable financial solutions to improve the livelihood, wellbeing, and empowerment of underserved Tanzanians. FSDT's work is guided by the Market Systems Development (MSD) approach, which aims to develop market systems that benefit the poor, offering them capacities and opportunities to improve their lives.

Currently, our main target markets are women and youth, who have been identified as the most financially excluded market segments in the country. FSDT is dedicated to supporting the financial sector in delivering inclusive, quality financial solutions that meet the financial needs of women and youth.

FSDT is committed to innovation of the financial sector, which sits at the heart of Tanzania's economic development. Partnering with researchers, policymakers and financial industry players, we employ a market development lens to appropriately utilise rigorous research findings and insights to support better understanding of the market and to inspire innovation through input, collaboration and discussion with all stakeholders, particularly industry experts and end users.

For instance, to assess the development of the market, FSDT, in partnership with the Bank of Tanzania (BoT), Ministry of Finance and Planning (MoF), the National Bureau of Statistics (NBS), Office of Chief Government Statistician Zanzibar (OCGS), financial services providers and other private sector players and nongovernmental organisations, engaged in the rigorous design, data collection, and analysis of FinScope Tanzania surveys. FinScope Tanzania presents a comprehensive understanding of the financial services landscape across the country, a measure for demand and usage of financial services by population segments and insights into the barriers to financial inclusion.

### **1.2 About the Conference**

The Inclusive Finance Conference 2023 aims to gather policymakers, scholars, regulators, private sector, and development partners to disseminate research findings, discuss advances in financial sector statistics in Tanzania and globally, as well as exchange and share knowledge on financial sector development. The conference will leverage on data to inform policy and legal frameworks reforms, as well as the development of financial products and services.

### **1.3 Objective the Assignment**

FSDT seeks to hire a consultant that will be the focal person for program planning and management, content development, and facilitation services for the Inclusive Finance Conference 2023 to ensure a smooth, well-coordinated and organized conference.

## 2. SCOPE OF WORK

The consultancy will include but not be limited to the following tasks:

### A. Pre-conference:

#### *Lead on Program design and development*

- Support FSDT to design and develop the overall program of the Inclusive Finance Conference 2023, to deliver a strong and compelling program for a physical summit in line with the theme of the Summit as well as inform the priorities of FSDT Partners.
- Conduct a program workshop to design the program strategy, outline key sessions and messages with stakeholders, including regulators, policymakers, FSPs, development partners, and others.
- Align programming in such a way that it will articulate the contribution of the Inclusive Finance Conference 2023 as a platform to critical regional and global dialogues around the use of data for policy and regulatory transformation, as well financial products and services development.
- Prepare and send out invitations to stakeholders of interest. Follow-up on confirmations and update invitation list.
- Confirm speakers' participation for the forum, including guest of honour, keynote speakers, panellists, moderators.

#### *Lead on Speaker management*

- Recommend speakers and moderators for the Inclusive Finance Conference 2023 to the FSDT Secretariat and manage a database of speakers and moderators that will take part in the Inclusive Finance Conference 2023.
- Ensure a diverse and dynamic speaker portfolio that provides a balance in terms of inclusivity (youth, gender).
- Lead on the invitation process and confirmations with all speakers at the Conference in alignment with agreements of FSDT.
- Lead on speaker communication, including session briefings, session information packs, speaker notes, etc.
- Work with session leads and resource persons identified for all Inclusive Finance Conference 2023 sessions to ensure quality session briefs are prepared and posted online and set up briefing sessions for speakers.
- Identify and provide support to session leads, and resource persons identified for the expected sessions as shall be discussed and agreed.
- Generate speaker profiles for all speakers for promotion on FSDT communication channels and inclusion in the FSDT database.
- Participate and provide briefs to the Organizing Committee, Steering Committee meetings, and as shall be required.
- Provide draft speaking briefs for the Inclusive Finance Conference 2023 Chair, FSDT CEO on the key sessions they will be engaged in.
- Design a delegate management structure with FSDT staff and service providers to delegate and session management.

### *Coordinate Side events program development*

- Lead on the call for side events and oversee the overall management and coordination of all side events on of the program and follow-on post-event reporting.

### **B. During the Conference**

- Manage the flow of the Program together with the event manager during the Inclusive Finance Conference ensuring sessions start and end on time and with good facilitation and clear outcomes that can be distilled and discussed at plenary and closing out sessions.
- Work closely with the secretariat and event manager to ensure effective session floor management.
- Lead on and coordinate the program for side events.
- Oversee the delegate management of key VIPs and critical sessions where relevant in collaboration with the secretariat and event manager.
- Provide qualified and bilingual rapporteurs to coordinate the documentation of sessions & plenaries and provide notes for each session at the end of the Conference that can be posted online (in English for all sessions).
- Track commitments to action in the context of the theme of the conference.
- Conduct three content-based session polls aligned to the Inclusive Finance Conference results framework and share the results with the Secretariat.
- Provide a rapporteur report on the outcomes and recommendations of each session from the conference.
- Prepare the Inclusive Finance Conference press release, to be shared with press at the conference.
- Conduct full analytics on the event engagement of participants and speakers (polls, surveys, deep-dive interviews) and provide findings to the secretariat as input for the theme and program design for 2024.
- Work closely with the events manager to ensure effective audience engagement and delivery of content during the conference.

### **C. Post-conference**

- Lead in the drafting of thank you notes to all conference speakers within 2 weeks after the conference, and in alignment with the conference Secretariat.
- Generate a key outcomes knowledge piece that aligns with the theme of the conference.
- Prepare and submit full reports from the thematic platform, in collaboration with the co-chairs of the thematic platforms highlighting the outcomes and priority follow-up areas for the following year.
- Prepare a final technical conference report for partners that captures the highlights of the program throughout the week, the summit outcomes, and recommendations from all the sessions.
- Prepare a final conference report to be broadcast and released externally.

## 2.1 Deliverables

The consultancy will be expected to deliver, the following outputs:

- Conduct a program strategy workshop and deliver a high-level program outline incorporating key sessions and speakers.
- Issue a call for side events.
- A high-quality detailed program structure with session briefs.
- Complete speaker invitations.
- A high-quality speaker management database that tracks and ensures all speakers are invited, confirmed, receive their briefs, and ultimately receive thank you notes after the conference.
- Full speaker profiles for all lead speakers for online and external publication.
- Final conference program with speakers, conference sessions, and side events program.
- Session briefs and presentations, for all sessions to be posted in an online database accessible by all speakers.
- All speaker briefings conducted and concluded.
- Side event report and rapporteur forms.
- Rapporteur notes from all conference sessions.
- A conference declaration and communique.
- Conference proceedings for all sessions.
- Speaker thank you notes.
- A final Summit Report with the summary of key sessions and outlining key outcomes.
- A publication capturing key voices at the Inclusive Finance Conference 2023 on the theme.
- Initial Theme draft proposals for Inclusive Finance Conference 2023.

## 2.2 Proposed Dates

| Date | Event  |
|------|--|
| TBD  | Session and content development of the Inclusive Finance Conference 2023 program. Conduct program workshop with partners and key leads for refinement of sessions with FSDT Secretariat and partners. In conjunction with the Secretariat, identification, and invitation of speakers and moderators for the Inclusive Finance Conference 2023. Report on the engagement with thematic platforms |
| TBD  | Produce session briefs and identify key messages and questions for discussion. High-level program structure. Call for side events. All speaker invitations completed.  |
| TBD  | Side event report with the full list of events. Hold session briefing calls for all sessions. Report on the engagement with thematic platforms   |
| TBD  | Draft Inclusive Finance Conference 2023 Communique that aligns with the theme-Data for policy and regulatory transformation. Draft conference technical report summarizing all outcomes from each session. Presentations, session briefs, and relevant documentation in a shared folder. Speaker briefings finalized. Full conference program with speakers' side events and sessions.           |

|     |  |
|-----|--|
| TBD | Manage the delivery of the Inclusive Finance Conference 2023 program with all moderators, speakers, and event managers. Provide Rapporteurs during the Inclusive Finance Conference 2023. Conduct a poll survey and survey report. Produce session notes/ Rapporteurs Notes. Preparation and Submission of all presentations, session briefs, and relevant documentation on a shared folder. |
| TBD | Conference proceedings on key sessions identified together with the program committee. Final Communique that aligns with stakeholder's contribution and Commitments to Action. Interact with the Secretariat as needed to provide any final content that may be requested as the final Inclusive Finance Conference report for publication and amplification.                                |
| TBD | Final Inclusive Finance Conference 2023 technical report – with key outcomes and recommendations from each session; report with outcomes and priority follow-up areas.   |
| TBD | Initial draft for Inclusive Finance Conference 2023  |

The Consultant will report to the CEO of FSDT or her designate. All deliverables submitted by the consultant shall be approved by the supervisors before any payment is made. All materials / documents arising out of this consultancy work shall remain the property of FSDT.

### 3. CONTENT OF BID PROPOSAL

- Details on all perceived strengths of the company bidding in meeting the scope of work outlined above e.g. previous experience, in-house skills, and any other information that will assist FSDT to assess capabilities, capacity, competitive advantages, etc.
- The service provider must provide details of a dedicated contact point for the management of the contract. This individual must be available by telephone to facilitate briefings on matters of interest to the FSDT. (Contingency arrangements must also be in place in the advent that this individual is unavailable).
- A list of at least three references letters/recommendations of previous and current organizations served or currently servicing.
- Detailed reference list indicating the scope and magnitude of similar assignments carried out including the client, dates, and budget.
- Proposed key staff, their roles including their CVs, academic and professional certificates. Their backgrounds must complement each other to facilitate effective delivery of the assignment.
- A list of the proposed value-added services to be provided to FSDT.
- The proposal should be no longer than 20 pages. Any additional information should be placed under annexures or appendices.

#### 3.1 Contract period

The proposed assignment commencement date is May 2023 and end date is October 2023.

### 3.2 Cost

Service providers must provide details on how they would charge for such an arrangement with expected billing milestones aligned with submission of the expected deliverables.

## 4. EVALUATION CRITERIA

Overall, the preferred bidder will be selected based on presenting the most economically advantageous tender. This means that bidders will be evaluated on a combination of technical and financial criteria. In this case the ratio between technical and financial scores will be 80/20.

The technical component of each proposal will be scored first using a grid that assesses several key attributes. This is set out below.

### Technical Proposal Scoring Grid

| Criteria   | Sub-Criteria Score | Max Marks |
|--|--------------------|-----------|
| <b>In depth understanding of the Terms of Reference (ToR), as well as a sound approach and methodology to the assignment with clear timelines.</b>   |                    | 25%       |
| <ul style="list-style-type: none"> <li>Value-added recommendations to FSDT.</li> </ul>   | 5%                 |           |
| <ul style="list-style-type: none"> <li>Sound demonstration of approach and methodology to the assignment, including scope of work.</li> </ul>  | 20%                |           |
| <b>Professional competence and experience</b>  |                    | 75%       |
| Company must demonstrate 10 years of experience in Program Planning and Management, Content Development and Facilitation Services.   | 15%                |           |
| Company must demonstrate experience in carrying out similar assignments for similar organisations. Please share at least 3 samples of similar assignments carried out. Share any available company accreditations.   | 30%                |           |
| <b>Experience and qualification of Lead Consultant/Team leader:</b> <ol style="list-style-type: none"> <li>PhD (preferred) or Master's degree in economics, finance, data analytics/research, knowledge management, international development, communication or closely related fields.</li> <li>Proven, diverse experience in documentation of economic transformation in Tanzania and the East African in understanding of the financial ecosystem in Tanzania.</li> <li>Experience in knowledge management</li> </ol> | 30%                |           |

|   |  |            |
|---|--|------------|
| strategy/framework design and approaches.<br>4. Exemplary analytical, writing and editing skills.<br>5. Proven ability to conceptualize, plan and execute ideas as well as transfer knowledge and skills.<br>6. Excellent written, oral and comprehension command of English and Swahili.<br>7. Demonstrable ability to work independently, managing a diverse team, managing multiple projects and deadlines simultaneously with a sense of urgency.<br>8. Proven ability to organize, manage and facilitate stakeholder engagements.<br>9. Previous experience in managing speaker invitation process in a conference set-up. |  |            |
| <b>Total marks</b>  |  | <b>100</b> |

To be considered further, a minimum total technical score of 70% is required. Only financial proposals from bidders scoring at least that level will then be evaluated.

The total financial cost in TZ Shillings (TZS) will be weighted according to the formula:

- $(\text{Lowest total financial cost} / \text{Bidder's total financial cost}) \times 0.2$
- Total technical marks weighted by a factor of 0.8.

The weighted technical and financial scores for each proposal that passes the minimum technical threshold will then be added to produce a total score. The preferred bidder will be the one producing the highest total combined score.

All bidders will be informed of the combined weighted scores for all proposals that pass the minimum technical threshold. The FSDT will also separately inform the bidder of any proposal that fails to meet this threshold.

### Financial Proposal

This will be a reimbursable fee contract up to a maximum financial limit. Financial proposals should be quoted in TZ Shillings. The FSDT requires a detailed and transparent budget breakdown in which all line items are clearly specified.

Financial proposals should be in TZ Shillings and must be submitted electronically separately from the technical proposal.

Financial proposals should be in this format:

| <b>Phases</b>             | <b>Rate (TZS)</b> | <b>Total (TZS)</b> |
|---------------------------|-------------------|--------------------|
| Daily Fees                |                   |                    |
| <b>Total Service Fees</b> |                   |                    |
| Other expenses            |                   |                    |

Financial proposals should be denominated in TZS. This consultancy will be subject to local taxes. It is the sole responsibility of the Consultant to meet all the tax liabilities arising out of this assignment. Financial proposals will be evaluated on a basis net of any local taxes.

## 5. SUBMISSION OF BIDS

**The deadline for submission of the proposal documents is 3pm, Thursday 20<sup>th</sup> April 2023. All documents must be submitted electronically to: [procurement@fsdt.or.tz](mailto:procurement@fsdt.or.tz) copying [rsinda@fsdt.or.tz](mailto:rsinda@fsdt.or.tz) with the subject: Inclusive Finance Conference 2023 Consultant Proposal.**

Any queries relating to this ToRs should be submitted in writing to FSDT under the following address, all questions and the answers will be shared with all short-listed bidders. The deadline for any queries is 2 days before the tender submission deadline date.

Procurement Manager,  
The Financial Sector Deepening Tanzania,  
2<sup>nd</sup> Floor De Ocean Plaza,  
Plot 400 Toure Drive,  
P.O. Box 1559 Oyster Bay, Dar es Salaam, Tanzania  
+255 222 602 873/5/6  
[procurement@fsdt.or.tz](mailto:procurement@fsdt.or.tz)

## 6. OTHER MATTERS

### 6.1 Confidentiality

All information contained in the terms of reference and attachments is provided on a strictly confidential basis solely for the use of Tenderers in connection with a competition for the supply of services for the above contract. It is a condition of this competition that Tenderers (and any sub-contractors) shall:

- take all reasonable measures to protect this confidentiality and avoid the unauthorized use, disclosure, publication, or dissemination of confidential information.
- not use this information other than for the purposes of preparation of a tender, and shall disclose it only to officers, directors, or employees on a specific need to know basis; and
- Not disclose, publish, or otherwise reveal any of the information contained herein except with the specific prior written authorization of FSDT.

### 6.2 CONFLICT OF INTEREST

Tenderers (and any sub-contractors) must disclose in their tender details of any circumstances, including personal, financial, and business activities that will, or might, give rise to a conflict of interest, if they were awarded this contract. Where Tenderers identify any potential conflicts, they should state how they intend to avoid such conflicts. FSDT reserves the right to reject any tender which, in its opinion, gives rise, or could potentially give rise to, a conflict of interest.



