

**Invitation to tender
for Workshops on financial sustainability
for Brot für die Welt partner organisations
in various countries with a focus on English and
French-speaking Africa**

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1 Terms of Reference

1.1 Brot für die Welt

Brot für die Welt (Bread for the World) is the globally active aid agency of the Protestant regional and free churches in Germany. In more than 90 countries, we support poor and marginalised people in improving their lives through their own efforts. The focal points of our work are food security, promoting education and health, access to water, strengthening democracy, respect for human rights, securing peace and protecting creation. We try to influence political decisions in favour of the poor and to create awareness for the necessity of a sustainable lifestyle and economy through lobbying, public relations and educational work in Germany and Europe.

Brot für die Welt provides financial contributions, personnel, expert advice and scholarships to churches, Christian organisations and other private sponsors worldwide who are involved in building a just society, who work against discrimination on the basis of origin, gender and religious affiliation and who support people worldwide who live in need and poverty, whose human dignity and rights are violated or who are threatened or currently affected by wars or other disasters.

Further information on the work of Brot für die Welt is available at: <https://www.brot-fuer-die-welt.de/en/bread-for-the-world/>.

1.2 Background

Brot für die Welt cooperates with partner organisations worldwide who initiate and implement important development work in their communities. Many of the locally registered partner organisations are under financial pressure. Access to funding has become more difficult and dependence on a few, mostly international, donors is increasing. At the same time, changes in the political conditions challenge the work of partner organisations.

In this context, Brot für die Welt has been strengthening partner organisations in **local fundraising** for several years. The aim of this work is to diversify local partners' income sources and decrease their dependency on grants from a few donors.

One of the approaches is to strengthen capacities in the area of financial sustainability of organisations through participatory workshops. A workshop concept with learning modules and content has been developed and implemented for this purpose. The aim of the workshops is to ensure that partner organisations are institutionally ready for strategic fundraising and have required tools at their disposal.

1.3 Objective of the contract

- Brot für die Welt partner organisations are trained in the five key components of successful resource mobilization (fundraising): relevance, credibility, relationships, visibility and proposal development, including good practices and helpful tools for each component.
- The partner organisations are trained in calculating their organisational costs and acquire knowledge on how they can cover these costs within the framework of projects.
- Partner organisations are accompanied in developing and implementing their own organisation-specific fundraising plan.

1.4 Parties involved

- Brot für die Welt: Programme Coordination Unit and Regional Units

- Local partner organisations in different countries worldwide, with a focus on English- and French-speaking countries in Africa. See Brot für die Welt country list: <https://www.brot-fuer-die-welt.de/projekte/#c347>

1.5 Service to be performed

In the coming years, Brot für die Welt wants to train partner organisations in several countries worldwide, with a focus on African countries, in "Financial Sustainability". The "Financial Sustainability Training" is a workshop model that has already been developed and implemented in different contexts. It includes training on the key components of successful resource mobilisation and aims to improve the institutional readiness of partner organisations for strategic fundraising in their local context. The workshops take place in different countries and each lasts 3 to 4 days. Each workshop is attended by 2 members from 10 to 12 partner organisations working in different sectors. The workshops should be led by two trainers with proven expertise in knowledge transfer and strategic fundraising in different contexts. Personal experience in raising institutional funds or donations is just as welcome as country and/or regional specific expertise. The workshop includes planning, adapting the content to local conditions, realisation and a follow-up. The workshops are participatory and gender-sensitive.

1.5.1 Activities to be carried out

A) Planning and implementation of face-to-face workshops in various countries:

- Coordinating the method and concrete procedure of the workshop with responsible persons at BfdW.
- If required, preparation of a pre-workshop questionnaire on participants' resource mobilization needs and a summary report to inform participants about the content of the workshop
- Tailoring the specific workshop to the interests and needs of the participants, based on a pre-workshop questionnaire.
- Pre-meeting with BfdW and other stakeholders in respective country and prepare the workshop (venue, workshop arrangements). Preparation and finalisation of all materials for the workshop.
- Workshop facilitation and capturing of discussion and results (2 consultants). The workshop should follow an interactive approach that encourages the exchange of best practices and experiences among partners.
- Workshop wrap-up meeting with responsible persons at BfdW.
- Workshop report and preparation of follow-up surveys to understand how participants have applied new knowledge and skills and follow-up on their action plans.
- If required, planning and realisation of online follow-up sessions (tailored to the needs of the participants, max. 4 hours per partner organisation)

B) Logistical organisation of the workshop:

In addition to the consulting services above mentioned, the client also commissions the logistical organisation of the respective workshop, e.g.

- The search for and booking of a suitable venue for the workshop, technical equipment, hotels/ accommodation and catering for the participants
- Coordination with with responsible staff at BfdW and with partner organisations in the respective countries by telephone, Zoom/ Teams and e-mail.

- Participant management such as preparation of materials, invitations, attendance lists, etc.

1.5.2 Special circumstances

Brot für die Welt has a partnership understanding on an equal basis with all partner organisations worldwide. The consultant is/are expected to conduct the workshop process in a sensitive, appreciative and respectful manner.

Depending on local circumstances, the learning model can be further developed and supplemented by a follow-up phase, so that the partner organisations not only develop their fundraising plan, but also receive support from the consultants in its implementation.

The workshops will be held in English or French. Appropriate language skills are required. Additional languages such as Portuguese, Spanish or local languages are welcome.

1.5.3 Scope of the service

- The planning and implementation of each workshop can last between 18 and 25 working days, depending on the country, prior experience of partner organisations and complexity of the undertaking in a given context.
- Each workshop may require between 2 and 5 days of travelling to different countries worldwide, with a focus on Africa.
- The organisation of the workshop - if required - can take 5-7 days.
- Approximately 2 - 6 workshops are planned per year. This is without guarantee and there is no entitlement to remuneration.
- For an overview of the reimbursable costs, see terms of payment.

1.5.4 Place of service delivery/ travel

The workshops take place in various countries worldwide, usually in the respective capital cities. Initially, there is a certain focus on English- and French-speaking countries in southern Africa and West Africa. Depending on the requests of partner organisations, the range of workshops can be extended to the whole of Africa and possibly to other continents (see country list: <https://www.brot-fuer-die-welt.de/projekte/#c347>)

Travel time is remunerated at half the agreed fee rate. Travelling expenses will be reimbursed in consultation with the client, provided they are settled in accordance with the terms of payment (see appendix).

1.6 Contract period and time schedule

The conclusion of a framework agreement (service contract) with a duration of four years is planned. For the services to be provided in accordance with section 1.5.1, annual individual contracts/ commissions will be concluded between the contractor and Brot für die Welt. Before concluding the individual assignment, the contractor must prepare an informal offer stating the expected time expenditure and daily rates as well as any ancillary costs and have it approved by the client. The individual assignment is commissioned on this basis.

Service or activity	Estimated time required (number of days)	Period of implementation

		(e.g. month/year)
A) Planning and implementation of face-to-face workshops in various countries	18 to 25 working days plus 2 to 5 days of travelling per workshop; 2 - 6 workshops per year	1 August 2024 - 31 July 2025
B) Logistical organisation of the workshop:	5 to 7 working days per workshop; 2 - 6 workshops per year	see above
A) Planning and implementation of face-to-face workshops in various countries	18 to 25 working days plus 2 to 5 days of travelling per workshop; 2 - 6 workshops per year	1 August 2025 - 31 July 2026
B) Logistical organisation of the workshop:	5 to 7 working days per workshop; 2 - 6 workshops per year	see above
A) Planning and implementation of face-to-face workshops in various countries	18 to 25 working days plus 2 to 5 days of travelling per workshop; 2 - 6 workshops per year	1 August 2026 - 31 July 2027
B) Logistical organisation of the workshop:	5 to 7 working days per workshop; 2 - 6 workshops per year	see above
A) Planning and implementation of face-to-face workshops in various countries	18 to 25 working days plus 2 to 5 days of travelling per workshop; 2 - 6 workshops per year	1 August 2027 - 31 July 2028
B) Logistical organisation of the workshop:	5 to 7 working days per workshop; 2 - 6 workshops per year	see above
Total A)	With an average time expenditure of 21.5 days per workshop and an average travelling time of 4 days per workshop and an average number of 4 workshops per year: estimated 86 working days per year and 344 working days in 4 years	48 Month
Total B)	With an average time expenditure of 6 days per workshop and an average number of 4 workshops per year: estimated 24 working days per year and 96 working days in 4 years	

This information is provided without guarantee. This does not give rise to any claim to remuneration. The figures are estimates and may therefore be higher or lower.

1.7 Reporting

The Contractor prepares a final report on the services and activities in the relevant language of communication and submits it in digital format to the Client within 30 days of the end of a workshop.

The report must be brief and include at least the following elements:

- Summary
- Description of the process of the workshop (activities carried out, methods used, partner organisations and persons involved - deviations from the planning must be explained)
- Description of the service delivered and achievement of objectives
- Factors that helped and hindered the service delivery and achievement of objectives
- Conclusions and recommendations

It is at the discretion of the Client to request additional interim reports.

The Contractor reports separately on his/her own initiative on any special incidents.

The Contractor agrees to an evaluation meeting if requested by the Client.

1.8 Requirements for the execution of the contract/ necessary qualifications

Consultants should fulfil the following requirements.

- Excellent skills and long experience in conducting workshops in the field of financial sustainability and fundraising;
- Very good facilitation and presentation skills;
- Experience in the organisation and implementation of participatory and gender-sensitive workshops in intercultural contexts
- Fluency in English and French; knowledge of another lingua franca such as Portuguese
- Region-specific knowledge of donor landscapes, with a focus on Africa;
- Proven practical experience in fundraising (institutional and/ or private donation);
- Intercultural skills, preferably work experience in various (African) countries
- Fitness to work in the tropics and willingness to travel abroad.

1.9 Further requirements

It is expected that the assignment will be carried out taking into account gender equality, impact and target group orientation as well as sustainability criteria.

2 Terms and conditions for tender

2.1 General principles

2.1.1 Contact person and questions

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Questions should be sent by email to the contact person. A timely response cannot be guaranteed for questions that are not asked at the latest 5 calendar days before the expiry of the tender deadline. Questions that are also relevant for other tenderers will be made available to all tenderers in anonymised form by email together with the answer.

2.1.2 Type of procedure

The contract will be awarded in accordance with the specifications for procurement procedures for supplies and services for grant recipients of the Bundesministerium für wirtschaftliche Zusammenarbeit und Entwicklung (BMZ / Federal Ministry for Economic Cooperation and Development) on the basis of the German Unterschwellenvergabeordnung (UVgO / Regulation on sub-threshold procurement):

Several tenderers, in principle at least three, are invited to submit a written tender.

If necessary, negotiation talks will be held with the tenderers; the tenderers have no right to such talks. The Client reserves the right to award the contract even without having negotiated beforehand.

The Client will not remunerate the preparation of the tender. Should the tender not be considered and/or there is no interest in submitting a tender, please send a prompt message to the above contact person, giving reasons if possible.

2.1.3 Procurement documents

The procurement documents consist of the following documents:

- Invitation to tender
- Model contract
- Terms and conditions for payment

General terms and conditions of contract or delivery or other terms and conditions of the Contractor that deviate from the specifications in the procurement documents are excluded. They do not apply in the event of an assignment even if they were enclosed with the tender.

2.1.4 Bidding consortia

A bidding consortium is an association of two or more individual tenderers who submit a joint tender. In the case of a bidding consortium, an authorised representative must be appointed. The authorised member represents the bidding consortium in a legally binding manner towards the Client. Each member of the bidding consortium is jointly and severally liable for the

performance of the contractual obligations even after its dissolution. The distribution of tasks within the bidding consortium must be set out in the tender.

2.1.5 Subcontractors

If necessary, the tenderer may also engage third parties for the performance of the contract and commission them with the performance of the services or parts of the services. If subcontractors are intended to be engaged by the tenderer(s), this must be stated in the tender. The Client reserves the right to request information about the subcontractor (e.g. on eligibility). The Contractor is also responsible towards the Client for the delivery of the service as agreed when using subcontractors.

2.1.6 Data protection within the framework of the procurement procedure

The tenderer agrees that the personal data provided by him/her may be processed and stored for the procurement procedure.

If personal data is passed on by the tenderer in the context of the procurement procedure (e.g. own employees, named contact persons at references), the obligation to provide information pursuant to Art. 13 GDPR or § 17 of the Kirchengesetz über den Datenschutz der Evangelischen Kirche in Deutschland [DSG-EKD / Data Protection Act of the Protestant Church in Germany] must be observed, i.e. the employees concerned must be informed accordingly and their consent to the processing of their personal data in connection with the submission of the tender must be obtained.

Upon conclusion of a contract, a data protection declaration must be signed by the Contractor.

2.1.7 Sanctions list screening

Based on international requirements [UN Resolution No. 1390 (2002), UN Resolution No. 1373 (2001), UN Resolution No. 2253 (2015), EC Regulation No. 881/2002, EC Regulation No. 2580/2001, EU Regulation No. 2016/1686 and EU Regulation No. 2017/1390 with numerous amendments], financial resources may not be paid to recipients who are on the sanctions list of the European Union and/or the United Nations and, in the case of transactions in US dollars, the United States of America. The implementation of appropriate safeguards is mandatory.

Accordingly, Brot für die Welt will carry out verification measures with all contractual partners against the existing sanctions lists of the European Union and the United Nations and, if applicable, the United States of America, in order to prevent funds from being paid to persons or organisations that are on the above sanctions lists.

2.2 Tenders

2.2.1 Form and content

The tender is to be prepared in English and should not exceed 15 pages. The tender must be submitted electronically in text form. A natural person authorised to represent the tenderer, a contact person for questions and full contact details must be provided.

A complete tender consists of:

a) Documents for the assessment of eligibility(Annex 4) :

1. Brief company description (incl. number of employees and structure, legal form, headquarters and other locations, main areas of expertise and activity) or short

- description of the applicant (with presentation of expertise and main areas of activity including linguistic/regional experience)
2. Information on total turnover and turnover with comparable services in the last three financial years
 3. List with at least 5 up to a maximum of 7 references of comparable services carried out in the last three years, stating the Client, the invoice value and the service period - the references must show that the tenderer has already carried out comparable services
 4. Self-declaration on the absence of grounds for exclusion pursuant to Sections 123, 124 GWB [Competition Act]

Additional information if applicable:

5. Declaration on the intended use of subcontractors, specifying the parts of the services to be performed by the subcontractors
6. Bidding consortia must submit a legally binding declaration signed by all members of the bidding consortium stating that each member of the bidding consortium is jointly and severally liable for the contractual performance of the service and that the authorised representative of the bidding consortium legally represents the listed members towards the Client and is in particular entitled to submit the tender and to accept payments with effect for each member.

b) Content tender

1. Designation of the project team intended to deliver the services, including details of the qualifications, specialist knowledge and experience of the staff, including language and regional knowledge, as well as meaningful CVs in table form.
2. Implementation concept with regard to the services described in the terms of reference with methodological approach
3. Specification of a sufficiently detailed work, time, milestone and resources plan

c) Financial tender

1. Indication of the daily rate in EUR per person for A) Planning and implementation of face-to-face workshops in various countries and B) Logistical organisation of the workshop, taking into account the specifications in the terms and conditions for payment (Annex 2). The budget template in Appendix 3 must be used for the quotation calculation.

The fee includes remuneration and other ancillary costs (cf. Section 6 Terms and conditions for payment). For contractors based abroad, the fee must in principle include all local and national taxes and duties (including value-added tax or analogous types of tax). In the case of contractors based in Germany, the net price must be stated. Travel time is remunerated at half the agreed fee rate. Costs for meals are not reimbursed, nor is a daily allowance paid. The specifications for pricing are defined in the terms and conditions for payment (Annex 2).

The number of days/trips/workshops/etc. and the budget are agreed in the contract as “up to” amounts. Under the contract, the Contractor is not entitled to fully exhaust the budget if this is not necessary for the objective of the service delivery.

2.2.2 Tender submission period and submission of tenders

Please send your complete tender with the subject Tender for Workshops on financial sustainability by **20.05.2024 of tender submission period**) at the latest as a PDF file by email to **vergabe-IP@ewde.de**

The binding period for the tender is: 31.07.2024

The documents must be received in full by Brot für die Welt by the end of the tender period. Brot für die Welt reserves the right to request missing or incomplete documents. The tenderer is not entitled to supplementary submission.

2.3 Eligibility assessment and award of contract

2.3.1 Eligibility assessment

The eligibility of the tenderer will be assessed on the basis of the following criteria:

- Main areas of activity/competence
- References
- Economic capacity

2.3.2 Award of contract

The contract is awarded to the most economical tender. This is determined on the basis of the award criteria price 30 percent and quality 70 percent.

When assessing the quality of the tender, the following sub-criteria are evaluated:

Award criterion	Maximum score	Weighting factor (WF)**	Evaluation points (EP)***	Performance points****
Price*				
Daily fee rate	30			
A) Planning and implementation of face-to-face workshops in various countries	20	6.66	0 to 3	=WF x EP
B) Logistical organisation of the workshop:	10	3.33	0 to 3	=WF x EP
Quality				
1. Qualification	30			
Professional qualification/ experience	10	3.33	0 to 3	=WF x EP
References	10	3.33	0 to 3	=WF x EP
Language and regional knowledge	10	3.33	0 to 3	=WF x EP

2. Content and conceptual quality of the offer	30			
Understanding of services needed and quality of the overall concept	10	3.33	0 to 3	=WF x EP
Quality of the implementation concept	10	3.33	0 to 3	=WF x EP
Innovation and methodological approach	10	3.33	0 to 3	=WF x EP
3. Organisational realisation	10			
Description of the implementation of services/logistics	5	1.67	0 to 3	=WF x EP
Consistency and clarity of time, process and resource planning	5	1.67	0 to 3	=WF x EP
Total	100			

***Price**

The lowest daily rate receives (30) points. The other tenders receive fewer points according to the relative deviation from the lowest daily rate.

Example: The cheapest daily rate offered by tenderer A is €150 and receives 30 points in the evaluation. Tenderer B's next highest hourly rate is €200, deviates by €50, i.e. 33.33%, and receives 20 points. The figures are rounded in accordance with standard commercial practice. Minus points are not awarded.

****weighting factor: Maximum number of points/max. evaluation points**

*** evaluation points

0 points	Objective not met
1 point	Objective largely met: comprehensible presentation, focus partly corresponds to the task
2 points	Objective well met: overall compelling and coherent presentation, focus largely corresponds to the assignment
3 points	Objective met with distinction: coherent and compelling presentation, focus on the specifics of the assignment

****performance points: Sum of weighting factor times evaluation points in the respective category

The tender with the highest total number of points (performance points) will be awarded the contract.

3 Annexes

Annex 1: Model contract

Annex 2: Terms and conditions for payment

Annex 3: Calculation template

Annex 4: Self-declaration on the absence of grounds for exclusion pursuant to Sections 123, 124 of the Competition Act (GWB)

Annex 5: Key components Workshop

Annex 6: Agenda Workshop

Annex 7: Individual Contract