



SOLOMON ISLANDS GOVERNMENT

MINISTRY OF MINES, ENERGY & RURAL ELECTRIFICATION

COMMUNITY BENEFITS SHARING PROJECT PHASE 2 (CBSP 2)

Terms of Reference

Expression of Interest

For Consultancy to Develop and Delivery of Financial Planning and Management Literacy Training

Locations : CBSP2 Project Communities at Malango and Bahomea within Malango Ward

Duration : 3 years on timely bases with a proposed start date of January 2025 (indicative)

Contract Type : Request for proposal (RFP) -REF: C3-NC-003

Description : Provision of training services for the delivery of Financial Planning and Management Literacy Training in selected communities under CBSP 2

1. CBSP2 Project Background

The Community Benefits Sharing Project – Phase 2 (CBSP 2) is a follow-on project to CBSP Pilot which aims to operationalize the benefit sharing scheme between Tina River Hydropower Development Project (TRHDP) and the project area communities. The CBSP Pilot established the Community Benefit Sharing Fund (CBSF) institutional arrangements and improved access to electricity and water for selected benefit-sharing communities¹. The CBSP-2 Project will build on and carry forward the results of the Pilot project by extending basic services equitably to the target communities and fully operationalizing the CBSF. The project development objective (PDO) is to enable target communities to benefit from improved access to and use of basic infrastructure and services, and to operationalize the Community Benefits Sharing Fund.

CBSP 2 has four components: 1) Operationalize the Community Benefit Sharing Fund, 2) Improve Access to Basic Services, 3) Enhance Skills of Community Members, and 4) Project Management, Monitoring and Evaluation. The project is expected to benefit 7,000 residents in the THRDP affected area.

Under Component 3, community members from CBSP project areas will be provided with training and employment support services aimed to increase their knowledge and confidence to participate in Community Benefit Sharing Fund and other economic development activities. It also aims to build their skills and income generating abilities in both formal and informal sectors. This component has 3 sub-components:

Component 3(a). Literacy and Numeracy Development will provide literacy and numeracy training to 600 CBSP community members aimed to provide basic certification to those with limited or no primary education as well as improve the likelihood to benefit from more technical and income generation aspects of the project.

Component 3(b). Livelihood, work readiness and life skills trainings will be provided to 720 people and aims to improve the skills and capacity of community members to enhance their work opportunities in both the formal and informal sectors and qualify for jobs both in the THRDP and elsewhere. This subcomponent will cover two types of training:

- ***Livelihood Skills Training*** will provide short term technical skills to 420 participants on specific areas relevant to existing livelihood and informal income generation activities in CBSP catchment areas such as agriculture and informal marketing.

- ***Life Skills and Work Readiness Training*** will build the knowledge and skills of 300 target participants on financial literacy, income-generation strategies and other life skills and well-being topics.

Component 3(c). Employment Support and Referral Services will provide employment and job coaching assistance, information sessions and referral services and employment and internship opportunities with TRHDP and outside. It will also link community members' skills to income-generating opportunities.

2. Overview of the Financial Planning and Management Literacy Training (FPMLT)

Objective

The CBSP2 team has conducted a training needs assessment to the tina hydro project catchment community members on the level of knowledge/understanding on livelihood activities of project catchment area (communities) and has a finding that many community members especially, women are engaged in micro small income generating activities and identified some challenges faced which includes financial illiteracy. The report has recommended a financial planning and management literacy training was among other identified livelihood skills training to be offered to the community members of Bahomea and Malango TRHDP project catchment area. Financial Planning and Management Literacy course aims on improving community members' skills on areas such as micro small economic activities planning and financial management on how to self-reliance and build their livelihood activities that would support them in terms of income earning and for household subsistence.

Community Benefit Sharing Project – Phase 2, Project Management Unit is hiring a suitable consultant, facilitator or and business houses in Solomon Islands with a proven track record of providing financial literacy training skills to local rural communities. The training service provider will be tasked to develop a participatory learning training material (Module) on business planning and management skills and to conduct seven (7) short practical trainings to the community members of the Tina River project area.

The course will design to reflects area such as livelihood ideation, planning to involve costing, marketing, building customer relationships, stakeholders networking and basic financial management.

Target Participants

This training will be provided to 420 participants (which 50% are women) targeting men, women, and youths (16-29 years old) including people with disability. The project will ensure the eligible participants are committed and able to develop a livelihood action plan and apply the learning by implementing an existing economic activity or starting up a new livelihood plan. Priority will be given to community members who are unemployed, especially the low-income individuals with low or limited education opportunities.

Training delivery

This Financial planning and management training will be implemented by the hired external service provider (consultant) or individual trainers for specialized or improved skills of micro small business and other livelihood activities. The consultant will deliver 7 short-term (5 days) trainings over the life of the project (approximately, over 3 years based on the contract timeline) with a maximum of 20 participants per class. The target participants will be expected to receive certificates of completion and have a livelihood action plan for application of the learnings.

3. Scope of Work

Under the direction of CBSP2 PMU, the training provider will be responsible to undertake the following key tasks.

a) Planning and Preparation of Training Contents and Materials

- In close coordination with the PMU, review and analyze the training needs analysis results to determine the financial planning and micro small enterprise management needs of the project affected community members.
- In coordination with the Training & Jobs Officer (TJO), develop a training workplan and schedules.
- Develop or customize the training course (Module) which will also include but not limited to practical exercises and case studies based on the target group's real-life scenarios, visual aids, presentations and handouts for better comprehension, where relevant guest speakers from financial institutions or experts to provide up-to-date information, insights and answers questions and an interactive workshops and group discussions.
- The training course will be designed to reflect.
 - The learning objectives and practical exercises
 - The topics to be covered based on the agreed number of days

- Training methods and process to be followed
 - Action plan or post training activities (for the application of learning) and
- Prepare pre and post-test in a simple and practical, appropriate to the level of participants.

b) Conduct community engagement/community awareness

- In coordination with PMU, Training & Jobs Officer and Community Liaison Officer (CLO), conduct community engagement to inform communities of the training activities.
- Obtain a register of communities and interested members' commitment to participate in the training.
- Be familiar with the communities to be covered by the training including any available facility relevant for the training

c) Organize and facilitate the Financial Planning and Management training course

- Organize and deliver training sessions on a timely basis according to the agreed workplan and schedule.
- Based on confirmed training schedule, ensure that notices or invitations to the participants are provided, and their attendance is confirmed.
- Arrange the training venues and printing of training handouts/ materials, training forms and evaluation forms, and other logistics arrangements
- Get participants daily attendance and encourage them to participate and be involved in discussions and practical activities.
- Guide the participants to develop their micro small enterprise action plans for the application of learnings which will include income generation strategies for starting - up or improving their existing livelihood activities.
- Facilitate final evaluation questions to participants
- Prepare and provide participants a certificate of completion based on the number of days attended/completed.

d) Training documentation and reporting

- Training service provider to obtain socio-economic data of participants using the forms provided by the project (PMU).
- Training data include number of participants, sex aggregated, age, and roles/positions in the community/organization are recorded
- The training report should provide the highlights of the training, consolidation of the pre-survey and post- survey, and evaluation feedback form.
- Submit each training class the progress reports and a completion report at the end of each session and final report at the end of the contract.

e) Provide post training follow-up and coaching support

- Provide follow-up and coaching support to the graduates within 6 months to ensure the livelihood action plans and learnings are effectively implemented.

Note: The scope of work may vary depending on the specific requirements and objectives of the TNA report. The consultant/facilitator should ensure that all tasks and responsibilities are clearly defined and agreed upon with the client before commencing the work.

4. Workplan and Time Schedule

The Financial Planning & Management Literacy Training is planned to be carried out over 3 years, (1 class in 6 months).

Activities	Expected outputs	Indicative schedule	Responsible
1. Prepare workplan and schedule			
2. Planning / develop training course /modules and training materials	Training design/modules and training materials developed, validated, and approved	Q4 2024	Consultant /Service Provider
3. Conduct community awareness and participants registrations	One session/ awareness per bi-annual	Q4 2024, to be repeated for new communities	Consultant/ Service Provider
4. Organize and facilitate Financial Planning & Management Literacy training classes	420 participants; 20 pax per class for 7 classes over 3 years.	Q1 2025 – Q4 2027	Consultant/ Service Provider
5. Post training follow-up and coaching support.	One follow-up / monitoring after 6 months of implementation	2025 -2027	Consultant/ Service Provider
6. Report preparation and submission	Report after each class completed	As per the reporting obligation	Consultant / Service Provider

Note: As part of the process, this timeline should be re-evaluated in consultation between the project management unit and the consultant.

5. Specific Training Deliverables

The training service provider will be expected to produce the following deliverables:

- Workplan and schedule

- Financial planning and management literacy training design/module that includes theoretical notes and practical exercises of the training.
- Workshop agenda and methodology
- A report summarizing each class (session) outcome including the participant list, photographs, and certification of the participant for their attendance.
- A livelihood action plan to guide learners into application of the knowledge and skills learned.

6. Reporting Obligations.

Outcomes	Due Date	Submit to
Inception Report <ul style="list-style-type: none"> • Work plan and training schedules approved by the PMU. • Training Course/Module designed or customized based on the needs of the target communities. • List of target groups/communities for the first class 	Within four weeks of the signing of contract	PMU & WB Team
Training Report No. 1: <ul style="list-style-type: none"> • 10% (20) of the project target trained in Financial Planning and Management Literacy Training, including pre-test and post-test data in the prescribed template with photo evidence of the training and certification • Follow-up Report on the application of the knowledge and skills learned 	Q1 2025	PMU & WB Team
Training Report No. 2: <ul style="list-style-type: none"> • 30% (40) on project target trained on Financial Planning and Management Literacy course, including pre-test and post-test data in the prescribed template with photo evidence of the training and livelihood action plan • Follow-up Report on progress coaching and support to trainees on their learning application 	Q3 2025	PMU & WB Team
Training Report No. 3: <ul style="list-style-type: none"> • 40% (60) of the Project Target participants trained in financial planning and management literacy course, including pre-test and post-test data in 	Q1 2026	PMU & WB Team

<p>the prescribed template with photo evidence of the training and action plan.</p> <ul style="list-style-type: none"> Monitoring report on the implementation of participants' knowledge and skills learned. 		
<p>Training Report No. 4</p> <ul style="list-style-type: none"> 60% (80) of the project target beneficiaries are trained in financial planning and management literacy courses. Report including pre-test and post-test data in the prescribed template with photo evidence of the training and learning skills application. Follow-up support and coaching report on the implementation of participants skills 	Q3 2026	PMU & WB Team
<p>Training Report No. 5</p> <ul style="list-style-type: none"> 70% (100) of the project target beneficiaries are trained on financial planning and management literacy course. Report including pre-test and post-test data in the prescribed template with photo evidence of the training. Follow-up report on the application of participants' knowledge and skills learned. 	Q1 2027	PMU & WB Team
<p>Training Report No. 6</p> <ul style="list-style-type: none"> 90% (120) of the project target beneficiaries trained on financial planning and management literacy course, including pre-test and post-test data in the prescribed template with photo evidence of the training. Follow-up report on the participants application of knowledge and skills learned from the course. 	Q3 2027	PMU & WB Team
<p>Training Report No. 7</p> <ul style="list-style-type: none"> 100% (140) of the project target 	Q1 2028	PMU & WB Team

<p>beneficiaries have completed the financial planning and management literacy course, including pre-test and post-test data in the prescribed template with photo evidence of the training and action plan.</p> <ul style="list-style-type: none"> • Follow-up report on the impact of the training on participants. 		
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7. Contract and Payment Terms

The payment schedule will be on a progress payment where the consultant and client agreed on the progress implementation of each training session.

Payment	Report/Deliverables	Documents/proof to be provided by consultant
1 st payment	Upon submission of inception report and work plan.	Training plan / Report/ invoices/report/acquittal
2 nd payment	Upon submission and acceptance by the Client of Progress Report 1 report (based on table of deliverables)	Training plan / Report/ invoices/report/acquittal
3 rd payment	Upon submission and acceptance by the Client of Progress Report 2 report (based on table of deliverables)	Training plan / Report/ invoices/report/acquittal
4 th payment	Upon submission and acceptance by the Client of Progress Report 3 report (based on table of deliverables)	Training plan / Report/ invoices/report/acquittal
5 th payment	Upon submission and acceptance by the Client of Progress Report 4 report (based on table of deliverables)	Training plan / Report/ invoices/report/acquittal
6 th payment	Upon submission and acceptance by the Client of Progress Report 5 report (based on table of deliverables)	Training plan / Report/ invoices/report/acquittal

7 th payment	Upon submission and acceptance by the Client of Progress Report 6/Final Report (based on table of deliverables)	Training plan / Report/ invoices/report/acquittal
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8. Proposal Selection Criteria

Individual or firm applications are expected to submit a completed proposal for this task meeting the following documents:

- A detailed response to the TOR.
- Company profile.
- Provide examples of previous work experiences
- Proposed approach and methodology to undertake the tasks as described in the scope of work.
- CVs per consultant and at least two references per consultant
- Proposed detailed planning and timeline
- Proposed budget for the assignment (including daily rate and expenses etc.)

9. Personnel

The training provider will engage qualified personnel to carry out the tasks as per the scope of work. The team will consist of the following personnel who will work under the technical supervision of CBSP2 PMU - Training and Jobs Officer.

Training Coordinator (01) – Part time for 7 months (1 month per quarter)

The responsibilities include:

- Liaise with the PMU, to review and analyse the training needs analysis results to see the specific financial needs and development planning and management of the project affected community members.
- Lead the development and designing/customize the training module and training materials in coordination with the PMU for technical inputs and guidance.
- Liaise with Training and Jobs Officer and PMU on contract management: Work plan/schedule, implementation and reporting.
- In coordination with PMU, Training and Jobs Officer and Community liaison Officer to conduct community engagement to inform communities of the training activities.
- Overall responsible for the effective and timely delivery of financial planning and management literacy trainings in accordance with the scope of work
- Coordinate with the team members for timely completion of deliverables under the contract.
- Lead the contacting and mobilization of the project team.
- Provide training in oversight and quality control.
- Prepare pre and post-test in simple and practical, appropriate to the level of participants

Qualifications and experience

- Degree in economics, accounting, project management or relevant subject or training and demonstrated experience in the relevant areas.
- Have at least 5 years' experience in managing adult financial literacy training programs.
- Knowledge about the local institutional environment (Local Government, Civil Society, and others) and stakeholder relationship
- Experience working with local organizations or communities in Solomon Islands.
- Knowledge and experience of using participatory learning approaches for adult training in financial management and small micro enterprise development.
- Experience in working with Government or donor funded projects.

The rate of providing the services for the Training Coordinator shall be deemed to include:

- Salary and benefits
- Travel and accommodation.
- Daily subsistence allowance

b. Trainer/Facilitator (02) – Part-Time (on contract bases) for 3 years (7 courses on financial planning and management literacy training)

The responsibilities include:

- Lead the development of Work plan in coordination with the PMU Training and Jobs Officer
- Engage in the community awareness program and to obtain the interested members commitment to participate in the training.
- Organize and conduct financial planning and management training sessions and practical exercises on a timely basis following the approved training design/module and training materials
- Ensure that notices or invitations to the potential participants
- Provide logistical support and procurement of needed training materials and other logistics including training handouts, visual aids and evaluation forms
- Guide the participant to develop their livelihood action plan for application of learning
- Prepare and provide participants a certificate of completion based on the number days attended
- To obtain socio-economic data of the participants using the forms provide to be effectively implementation
- Write the narrative report of the training session
- Provide follow-up and coaching to the trainees within 6 months to ensure knowledge and skills learned are effectively applied.

Qualification and experience

- Graduate degree or diploma in economic, management or accounting or relevant field
- At least 3 years' work experience in financial development particularly in financial planning and small micro enterprises advisory in the Solomon Islands
- Knowledge and experience in coaching and facilitation using the participatory learning approaches for adults.
- Excellent facilitation skills

- Excellent communication skills, verbal and written both in English and Pijin.
- Proven experience in engaging in the private sector and working with local financial and business institution both in urban and rural communities including women, youths and people with disability.
- Familiar with development of training manuals

10. Proposal Evaluation Criteria

Criteria	Score %
Technical	70%
1. Qualifications and Experience: The service provider qualifications and experience in conducting financial planning and management literacy training focussing on livelihood development for women and youths in rural communities, will be evaluated. This may include their education, training, and relevant work experience in the field.	20%
2. Methodology and Approach: This may include their ability to design practical exercises and participatory sessions that encourage knowledge and skills applications, creativity, and collaboration among the participants.	15%
3. Workshop Content: The consultant/facilitator's proposed training content will be evaluated. This may include their ability to develop a curriculum that covers all aspects of the financial planning and management literacy course and lead to effective livelihood development.	15%
4. Innovation and Creativity: This may include their track record of developing or coaching or supporting of such initiative towards rural financial management and small micro project development in Solomon Islands, as well as their ability to inspire and encourage participants to think and create new ideas to help improvement livelihood.	10%
5. References and Reputation: This may include feedback from previous clients and participants, as well as their reputation within financial and commercial sector.	5%
6. Availability and Timelines: This may include their ability to deliver the 7 financial literacy trainings over period of 3 years as proposed timeframe and their availability for follow-up support or coaching.	5%

Financial Proposal	30%
TOTAL	100%

The evaluation team may also consider any additional criteria as deemed necessary for selecting the best candidate.

Thank you for your proposal