

Pangaea ADD Capital (PADD) is a Zambian company incorporated in 2019 by two shareholders with Banking and Microfinancing experience spanning over 25 years respectively. The Company is seeking a qualified training consultancy to enhance the skills and knowledge of our staff in Analysis and appraisal, Strategy – Organizational Strategy; Strategic Development and Assessment; Strategic Execution, Metrics and Assessments.

PADD REQUIRES THE SERVICES OF THREE CONSULTANTS

CONSULTANCY 1:

CONSULTANCY ON THE ANALYSING AND APPRAISING FEMALE AND MARGINALISED BUSINESSES

OBJECTIVE OF CONSULTANCY

The objectives of the engagement will be to enhance the skills and knowledge of PADD staff analyse and appraise Female led and Marginalized businesses.

CONSULTANT'S TASKS

In collaboration with the Management of PADD, the Consultant will be responsible for:

- Achieving the deliverables.
- Monitoring participant progress
- Provide support and generate progress reports.

DELIVARABLES AND APPROVAL PROCEDURE

PADD shall satisfy itself that the terms of reference of the consultancy/assignment have met its expectations when:

- Formulation of an addendum to Credit Policy to include Female and Marginalized businesses products is actualized.
- Certification of the trained PADD staff in the analysis and appraisal of female led and marginalized business.

The consultant will be evaluated monthly based on the timely and effective actualization of the key deliverables. Where the deliverable is not satisfactory, the consultant may be required to revise the work. At the end of the assignment, the Consultant shall provide a detailed report containing the elements required by the ToR.

CONSULTANT'S QUALIFICATIONS

The Consultant responsible for carrying out the work described above should have the following profile:

- Must possess a Master of Business Administration (MBA) degree and additional relevant qualifications in Risk Management, Banking & Finance, Economics.
- Have sufficient knowledge of the Credit and Accounting Standards for MFIs in Zambia and of the performance indicators for MFIs in Zambia and those required by the Central Bank;
- At least ten (10) years' experience in the financial sector (banking, microfinance);
- Have taken part in five (5) training courses or moderated conferences relating to the support of MFIs or commercial banks.

DURATION OF ASSIGNMENT

The mission will be carried out in three phases:

- The first phase: Needs assessment and preparation of relevant material shall be done in the first month.
- Second phase: Implementation stage shall involve the training of staff to be conducted over the next 3 months
- Preparation of the Project report: To be done in the last 2 months of the project

CONSULTANCY 2:

CONSULTANCY ON THE DEVELOPMENT OF A BUSINESS INTELLIGENCE FRAMEWORK

OBJECTIVE OF CONSULTANCY

The objectives of the engagement will be to develop Business Intelligence Framework and MIS Systems for PADD.

CONSULTANT'S TASKS

In collaboration with the Management of PADD, the Consultant will be responsible for:

- Achieving the deliverables.
- Monitoring participant progress
- Provide support and generate progress reports.

DELIVARABLES AND APPROVAL PROCEDURE

PADD shall satisfy itself that the terms of reference of the consultancy/assignment have met its expectations when:

- Business Intelligence Framework and MIS Systems are developed. The systems should be able to use data analytics and technology to share valuable business information with decision-makers in PADD.
- Software tools used to guide business strategies are developed.

The consultant will be evaluated monthly based on the timely and effective actualization of the key deliverables. Where the deliverable is not satisfactory, the consultant may be required to revise the work. At the end of the assignment, the Consultant shall provide a detailed report containing the elements required by the ToR.

QUALIFICATIONS OF THE CONSULTANTS

The Consultant responsible for carrying out the work described above should have the following profile:

- Must possess a Master of Business Administration (MBA) degree and additional relevant qualifications in Information and Communication Technology (ICT), Software development, Statistics, Risk Management, Banking & Finance.
- Have sufficient knowledge of the Business Analytics, Information Systems, Credit & Accounting Standards for MFIs in Zambia and of the performance indicators for MFIs in Zambia and those required by the Central Bank;
- At least ten (10) years' experience in the ICT or financial sector (banking, microfinance);
- Have taken part in five (5) training courses or moderated conferences relating Business Intelligence and Management Information Systems for MFIs or commercial banks.

DURATION OF ASSIGNMENT

The mission will be carried out in three phases:

- The first phase: Needs assessment and preparation of relevant material shall be done in the first month.
- Second phase: Implementation stage shall involve the development and testing of the developed systems from the second to the fourth month.
- Preparation of the Project report: Deployment of the systems and preparation of system manuals and reports to be done in the last two (2) months of the project.

CONSULTANCY 3:

CONSULTANCY ON THE DEVELOPMENT OF A STRATEGIC PLAN

OBJECTIVE OF CONSULTANCY

The objective is to help PADDC develop a 3 year strategic plan.

CONSULTANT'S TASKS

In collaboration with the Management of PADDC, the Consultant will be responsible for:

- Achieving the deliverables.
- Monitoring participant progress
- Provide support and generate progress reports.

DELIVARABLES AND APPROVAL PROCEDURE

A 3-year PADDC strategic plan.

The consultant will be evaluated monthly based on the timely and effective actualization of the key deliverables. Where the deliverable is not satisfactory, the consultant may be required to revise the work. At the end of the assignment, the National Consultant shall provide a detailed report containing the elements required by the ToR.

QUALIFICATIONS OF THE CONSULTANT

The Consultant responsible for carrying out the work described above should have the following profile:

- Must possess a Master of Business Administration (MBA) degree and additional relevant qualifications in Risk Management, Banking & Finance, Economics and Strategic Management.
- Have sufficient knowledge of the Operations, Marketing and Financing of MFIs in Zambia and of the performance indicators for MFIs in Zambia and those required by the Central Bank;
- At least ten (10) years' experience in the financial sector (banking, microfinance);
- Have taken part in five (5) training courses or moderated conferences relating to formulation of strategy for MFIs or commercial banks.

DURATION OF ASSIGNMENT

The mission will be carried out in three phases:

- The first phase: Needs assessment and preparation of relevant material shall be done in the first month.
- Second phase: Implementation stage shall involve the having strategic sessions with Management in the second month.
- Preparation of the Strategic plan and Project report: To be done in the last month of the project

BID PRESENTATION FOR THE THREE CONSULTANTS

The consultant will submit his application file including a technical offer and a financial offer presented separately in two (02) separate envelopes.

The 1st envelope will contain the technical offer, consisting of the following elements:

- A letter of submission for the technical offer addressed to the Managing Director of PADDC.
- A note presenting the content to be covered by the training.
- A note on the training plan (chronogram) and methodological approach.
- A detailed curriculum vitae including the candidate's professional profile and consultancy achievements
- Copies of diplomas, certificates and other documents proving the consultant's qualifications and experience; The technical proposal will not include any indication of cost and will be written in English.

The 2nd envelope will contain the financial offer. This will be in the form of a letter addressed to the Chief Executive Officer of PADDC which will include;

- Consultant's fees based on unit costs and man-days, taking into account the work schedule.

The two envelopes will then be placed in an outer envelope marked: "PANGAEA ADD CAPITAL & TDF PROJECT CONSULTANCY – ANALYSIS AND APPRAISAL OF MARGINALISED BUSINESS"

SUBMISSION OF TENDERS FOR THE THREE CONSULTANTS

Tenders must be submitted to:

**The Chief Executive Officer,
Suite 3, 1st Floor, FNB Building, ZMART City
Office/Stand No. 2711
President Avenue, Town Centre Ndola**

The deadline for submission is **Monday 15th July 2024**.

Any offer received after the deadline will not be considered.

TENDER OPENING

Tenders will be opened in the presence of any bidders wishing to attend on 15/07/2024, at 3 p.m. sharp, in the PADDC Head Office board room.

Bids will be valid for 60 days from the bid opening deadline.

REMUNARATION AND PAYMENT TERMS

The amount of remuneration and payment terms will be specified in the service contract.