

## TERMS OF REFERENCE

**Training program for Incubation**  
**Project: “Sustaining Economic Recovery for Peace” (SERP)**  
**Financed by: Austrian Development Cooperation**  
**and Caritas der Erzdiözese Wien-Hilfe in Not**

### **1. INTRODUCTION**

International Charitable Foundation “Caritas Ukraine” calls for tender bids to conduct 3 Incubation in three 3 cities: Odessa, Bilhorod-Dnistrovsky and Izmail in the framework of the Project **Sustaining Economic Recovery for Peace** (SERP) executed by ICF Caritas Ukraine, 10 Antonovicha str, Kyiv, Ukraine together with the Caritas Odessa UGCC.

The project is funded by Austrian Development Cooperation (ADA).  
The selected company will be contracted by Caritas Odesa and shall conduct 3 Training Programmes until March, 2020.

### **2. BACKGROUND OF THE PROJECT**

#### Project goals:

The project’s aim is to contribute to the regional prosperity of Odesa oblast by providing equitable access to employment opportunities for 2040 job-seekers and increased capacity for entrepreneurial skills for 525 potential entrepreneurs to achieve sustainable income and improve community cohesion. The project targets both Internally Displaced People (IDP) and local population and has geographic focus on the cities of Odesa, Bilhorod-Dnistrovskiyi and Izmail.

#### The expected outcome of the programme is:

IDPs and local population in Odesa oblast have increased equitable access to employment opportunities and increased capacity for entrepreneurial skills to achieve sustainable incomes and improved community cohesion.

In order to achieve this outcome the following outputs will be delivered by the programme:

Result 1. User-friendly portal is created and functional to provide unemployed local and displaced population with information about employment trends, and employment services by government departments and NGOs.

Result 2. Individual counselling services (Case management) are provided to 2040 unemployed local and displaced job-seekers in Odesa, Bilhorod-Dnistrovskiyi and Izmail cities.

Result 3. 10 Business incubation and 7 acceleration programs are organised for potential entrepreneurs in the cities of Odesa, Bilhorod-Dnistrovskiyi and Izmail

Result 4. 100 financial grants are awarded through a competitive selection process to first time and existing entrepreneurs that successfully attended incubation and acceleration sessions.

#### **Project activities:**

The project combines the expertise and knowledge of the two project partners (Caritas Ukraine, Caritas Odesa) and offers a perspective to future employees and self-employers. The project offers a combination of individual services of case-management for job-seekers drawing on the successful experience of Caritas Odesa in the sector, and, based on the best practices of Caritas Ukraine in

business development, involving local and national experts. It provides tailored incubation and acceleration programmes for potential entrepreneurs with a special focus on four business sectors (IT/E-commerce, Agriculture, Tourism, Social business), coupled by grants awarded on a competitive basis and activities that encourage IDPs and local communities to work together.

### **Context of intervention:**

The main challenge that the project will address is related to integration of internally displaced persons from the conflict affected areas in the Donbas and from Crimea. Integration challenges are mostly linked to economic integration: Given the increasing levels of unemployment and economic recession, local communities fear competition of IDPs for same resources and opportunities. The experience of the applicant and local partners in working both with local and IDPs communities leads to undertaking an approach towards fostering integration that will target both IDPs and local population and will pass through improving employability of unemployed job-seekers as well as increasing the capacities of entrepreneurs to generate income and become sustainable.

Geographic focus: the main activities of the project will be implemented in Odesa, Bilhorod-Dnistrovskij and Izmail.

The idea of focusing the acceleration programmes for potential entrepreneurs on four main business areas:

IT/E-Commerce: relevant for all three selected areas

Social Business: especially thriving in Odesa city

Agriculture: mostly relevant for the rayons of Bilhorod-Dnistrovskiyi and Izmail

Tourism: of high potential in the three areas.

The beneficiaries of the project are unemployed IDPs and local people with an average ratio of 60% being IDPs and 40% members of host communities. A total of 2040 job-seekers will be selected for Expected Output 2 (case management) and 525 potential and existing entrepreneurs will be selected for Expected Output 3 (incubation and acceleration programmes). The general amount is 2040, including 525, which are for studying projects.

The Grant Agreement (contract-nr. 8320-00/2016) with the Austrian Development Cooperation (ADA) was signed by Caritas Ukraine on 30/11/2016.

Duration of project: 01.12.2016 – 31.05.2020

### **3. THE OBJECTIVES OF THE ASSIGNMENT**

The main tasks are to develop the content and conduct the Incubation Programme for entrepreneur beginners including group trainings for potential entrepreneurs, individual counselling sessions, networking events. The Incubation program's aim is the obtaining of entrepreneur skills for opening and doing business. Participants will get acquainted with the basics of entrepreneurial activity, accounting and legal aspects of entrepreneurship. After the presentation of their business project idea, an independent commission will determine the winners of a business start - up grant on a competitive basis. The beneficiaries' tasks will be the development of a business plan, of business canvas and marketing plan.

Participants in training programs will study the basic principles of environmental protection and responsible business. Among the grant selection criteria, environmental and social responsibility aspects will have high priority.

#### **4. PROGRAMS' REQUIREMENTS.**

To carry out 3 Incubation programs in three target cities for the above mentioned project the following the General Terms and Conditions 1 to the Austrian Development Cooperation's Grant Agreement.

**3 Incubation programmes (min 60 participants )** must be held until the end of February, 2020 (min 33 participants in Odesa, 15 - in Izmail, 12 - in Bilhorod -Dnistrovsky).

Incubation programmes last for 5 to 7 weeks each and target entrepreneur beginners. Trainings shall be provided to small groups and will be held in the three hubs (Odesa, Bilhorod-Dnistrovskyi and Izmail) for the selected beneficiaries. The trainings are held by experts and the size of the groups allows direct supervision by trainers. It will be possible to adapt or modify the curricula based on the assessment and feedbacks of participants. Main topics covered in the incubation programme include (in sequence):

1. *Motivation and acquaintance*: discussion of the programme, its main parts, acquaintance with participants and teachers. Presentation of former participants of current/similar programmes.
2. *Planning*: start of own projects and programmes (Blue Oceans Strategy, strategic canvas, basics of planning business). First business plans created with possibility of consulting with experts. Presentation of projects with further recommendations.
3. *Legal aspects of business and accounting* (2 sessions and personal consultations. Also includes presentation of grants issuing, requirements and limitations). Main output of cluster – development of personal financial plan.
4. *Marketing and work with clients* (general presentation about marketing, sales, internet sales and personal consultations). Main output of cluster – development of marketing part of the project with further presentation.
5. *Human resources*. Lecture on the legal and accounting registration of employees. Lecture on team building, motivation of employees.
6. *Preparation of presentation* (legal and financial consultations, answers on FAQ; storytelling, visual presentation; optional; specific lectures based on concrete needs of the group and/or 'crash tests' of the participant's projects.
7. *Presentation and defense of the project* (preparation of documents, presentation to the expert panel selection committee, decision of selection committee).

After project presentations to an independent commission all participants will receive the Certificate-of-Trainings

## **5. OUTPUTS**

The contractor is asked to carry out **3 Training programs**.

Programs are covering the following **period** of implementation: January-February 2020.

The expected project period (01.12.2019 – 31.05.2020).

Training program shall be conducted in three cities : Bilhorod-Dnistrovsky, Izmail and Odesa.

3 Business incubation programmes are organised to increase entrepreneurial capacities and skills of potential and existing entrepreneurs in the target region in cooperation with the contractor.

The Contractor Company is asked to:

- Develop and adapt training programs, including:
  - Training materials and hand-outs developed
  - Attendance records of trainings kept and reported
  - Draft a template of final report for individual trainer to guide their reporting and recommendation presentation (Template to approve and coordinated with PMT)
- Conduct training programs
- Select qualified Trainers/ experts
- Assess the impact of ongoing programs.

**Working methods:** work in the classroom in the format of interactive lectures + case studies.

**Target audience (by sector):**

- IT / Internet trading
- Agriculture
- Social enterprises
- Tourism

All participants will have meetings with professors and experts during the training.

In parallel, during training, the teams must increase the skills of project management, financial and statistical analysis, marketing, PR, sales, etc.

Before completing the program, each participant will present his project to other participants and expert commission. For better studying process (for example, the content of writing a budget, rules for building a team, etc.), participants will be given homework between modules.

Deliverables and milestones (is offered for filling by applicants):

<b>Deliverable/Milestone</b>	<b>Indicative timeframe</b>
Content of the incubation training programs	16 December 2019
Plan of conducting programs	
Additional events	

## **6. QUALIFICATIONS OF THE SUCCESSFUL SERVICE PROVIDER AND VARIOUS LEVELS**

### **Corporate Competencies**

- Officially registered legal entity;

- At least 5 years of experience in consultancy, elaborating, organizing and delivering training programs and technical assistance;
- Demonstrated experience in developing, organizing and delivering training and technical assistance programs for the private sector.
- Experience working with donor organizations and/or multi-national or international companies/organizations will be an asset;
- Availability of qualified experts in each key area of expertise: business plan development, marketing, etc.

#### **Qualifications and experience of the Task Manager**

- University degree in Economics, International and/or Local Development, or other relevant fields;
- Minimum 7 years of experience in a supervising/team leading position in the field of consultancy, training and technical assistance.
- Experience in leading local, regional or projects will be an asset;
- Extensive experience in strategic planning, including sector-specific analysis, definition of sector priorities, with demonstrated ability to analyze, plan, and meet the expected results
- Relevant experience and understanding of local economic and political development context, specifically with regard to issues related to emerging biomass markets would constitute an important asset
- Mandatory fluency in English and Ukrainian.

#### **Qualifications and experience of the proposed trainers**

- Bachelor degree in Economics, Marketing or other relevant areas;
- At least 5 years of hands-on experience in sectors pertaining to each thematic training:
  - Business analysis
  - Marketing
  - Taxes
  - Business coaches in business incubators
  - Consultants in the Accelerating programs
  - Entrepreneurship
  - Economy
- Training experience or proven experience in facilitation and coaching of small groups of participants
- Experience in strategic planning, including sector-specific analysis, definition of sector priorities, with demonstrated ability to analyze, plan, and meet the expected results
- Relevant private sector experience and understanding of local economic and political development context

### **7. DOCUMENTS TO BE INCLUDED IN THE SUBMISSION OF PROPOSALS**

Companies submit the following documents:

- Company Profile
- Certificate of Registration of the business
- Statement of Satisfactory Performance from the Top 3 Clients in terms of Contract Value the past 3 years

- Financial Statement (Income Statement and Balance Sheet) for the past 3 years
- Pertaining documents of the assigned staff (Task Manager and trainers)
- Proposed methodology for the incubation training programs;
- Financial offer.

Training programs are conducted in Russian or Ukrainian.

The application is completed in Ukrainian and English.

Reports are provided in Ukrainian.

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