



P.O. Box 13912, HATFIELD, 0028 | 2nd Floor, Block E, Hatfield Gardens, 333 Grosvenor Street, Hatfield, PRETORIA, 0028, Tel: +27 012 748 1000,
Fax: +27 086 667 8894

VAT No.: 496 026 5751

CLOSING DATE:	27 July 2023
CLOSING TIME	14h00PM
DESCRIPTION OF BID:	Request for Proposals for Finance Consultant to form part of the Oversight-Led Technical Team to one of the Global Fund PRs in the grant for 15 days
Number of Service Providers	SANAC Trust to Appoint one (1) Service provider to work
RFP/ RFQ TO BE EMAILED TO THE FOLLOWING EMAIL ADDRESSES:	
<ul style="list-style-type: none">- Email address: Beullah@sanac.org.za- Copied: Mbali@sanac.org.za- Copied: Geraldine@sanac.org.za	
Email submission is accepted for this request	



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Terms of Reference

Request for Proposals for Finance Consultant to form part of the Oversight-Led Technical Team to one of the Global Fund PRs in the grant for 15 days.

1) Background

Country Coordinating Mechanisms are national committees that submit funding applications to the Global Fund and oversee grants on behalf of their countries. They are a key element of the Global Fund partnership.

A Country Coordinating Mechanism – often called a “CCM” – includes representatives of all sectors involved in the response to the diseases: academic institutions, civil society, faith-based organizations, government, multilateral and bilateral agencies, nongovernmental organizations, people living with the diseases, the private sector, and technical agencies.

A Country Coordinating Mechanism transparently and inclusively:

- Coordinates the development of the national request for funding.
- Nominates the Principal Recipient
- Oversees the implementation of approved grants.
- Approves any reprogramming requests. Ensures linkages and consistency between Global Fund grants and other national health and development programs.

The Oversight Committee is a key standing sub-committee of the CCM, this committee is responsible for overseeing the grant. This committee works very closely with the Principal Recipients and notes the gaps in the grant.

2) Purpose of the consultancy:



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The CCM through its oversight committee has noted a gap in one of their Principal Recipients (PRs) as well as other Principal Recipients in the grant. And therefore, want to conduct an assignment to review internal finance control systems, budget oversight to understand the root cause of disbursement challenges the PR is experiencing from the funder due to incomplete financial reporting.

3) Objectives:

- a. Assess the effectiveness, efficiency, and transparency of financial and internal systems and controls.
- b. Assess finance policies and sample financial procedures as carried out in the organisation and the alignment thereof.
- c. Assess the disbursements to Sub-Recipients (SRs) – frequency, amounts forecasting etc.
- d. Assess if there are accurate, quality, and relevant financial measures in place regarding financial risk and management thereof.
- e. Assess measures of monitoring the budget, analysing financial plan results, identifying, and evaluating new financial strategies
- f. Identify the root causes of financial challenges that lead to curtailed disbursements and advise on steps that can be monitored by the CCM and Oversight Committee to ensure improvement of the PR.

4) Project Scope and Requirements:

- a) The consultant is responsible for reading the relevant documents.
- b) The consultant will be responsible for consultations with relevant stakeholders including the sub-recipients, service providers, donor and the Local Fund Agent
- c) The consultant will be required travel to the PR's offices and conduct the assessment.
- d) The Consultant will thereafter debrief with the task team.



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e) The consultant will write their financial findings and include milestones to be monitored for six months. The consultant will submit a detailed report that includes an objective analysis and recommendations to the country board.

5) Deliverables

- a) Desktop Review and stakeholder engagement report
- b) A report with clear root causes, recommendations and monitoring framework for the CCM

6) Timelines

Activity / Draft Deliverable	Number of Days	Timeline
1. Desktop Review and Ad-hoc Committee inception meeting	1 day	31 July 2023
2. Online Consultations with stakeholders/ SRs/PR	1 day	1 August 2023
3. Actual financial assessment at the PR's office	7 days	7-18 August 2023
4. Document Findings and discuss recommendations with the Technical Team	3 days	21 – 25 August 2023
5. Report Writing and presentations to relevant committees	3 days	28-31 August
TOTAL	15 Days	

7) Qualifications and Experience and Skills

- B. Com with senior degree with a professional qualification i.e., CA (SA) etc.
- Registered with a professional Body i.e., SAICA, IRBA etc.
- A minimum of 8 years' professional experience in Financial Management environment.



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- Knowledge of Global Fund Policies on Financial Management and experience with GF financial reporting and controls
- Well-developed skills in setting priorities, coordinating tasks and a pro-active approach to work.
- Excellent organizational and management skills.
- Able to work both independently and as part of a team in a multicultural environment.
- Fully computer literate.
- Vast experience of the NGO Management environment or compliance driven environment i.e., Global Fund, USAID, government etc.
- Knowledge of major international donor requirements
- Advanced proficiency in Financial Reporting Software i.e., SAGE, QuickBooks etc.
- Excellent communication skills, both verbal and written.

8) Supervision and Payment:

- The consultant will report to CCM Secretariat and the Oversight Committee.
- The consultant will be paid after the assignment, upon submission of the project report as this is a short-term assignment. However, travel and accommodation costs will be covered by SANAC.

9) Evaluation Criteria

The selection of the best offer will be based on the combined scoring method: (the qualifications and methodology will be weighted 80%, combined with the price offer, which will be weighted 20%). Bidder with 70 or more points on technical evaluation will qualify for price evaluation.



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Stage 1 : Technical Evaluation

ELEMENT	Rating					Maximum Score	Total
<p>Detailed Technical proposal demonstrating a clear process and methodology with intermediate and final outputs, identified timeframes/milestones, and management of the Project for delivering high-quality products in line with the TORs:</p> <ul style="list-style-type: none"> • Addressed poorly = 1 point • Addressed but with limitations= 2 points • Addressed adequately = 3 points • Adequately addressed with advanced understanding in some areas = 4 points • Extensively addressed (well-articulated proposal with achievable timelines) = 5 points 						40	
<p>Demonstrated experience and knowledge in financial management, internal controls and assessing financial capability of entities:</p> <ul style="list-style-type: none"> • No relevant knowledge and experience on financial management (less than 1 years' experience) = 0 point, • Has limited knowledge and experience on financial management (two to four years' experience) = 1 points, • Has knowledge, but has no experience on financial management (three to four years' experience) = 2 points, • Has limited knowledge and experience in financial management (four to six years' experience) = 3 points, 						30	



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ELEMENT	Rating					Maximum Score	Total
<ul style="list-style-type: none"> • Has relatively good knowledge and experience in financial management (six to eight years' experience) = 4 points • Has over eight years of knowledge and experience in financial management = 5 points 							
<p>Qualification on financial management and sector experience:</p> <ul style="list-style-type: none"> • B.COM Degree with 0-to-1-year relevant HIV/TB & STIs experience = 0 Points • B.COM with 1 to 3 years' relevant HIV/TB experience = 5points • B.COM Degree with 3 to 5 years' relevant HIV/TB & STIs experience = 10 points • B.Com Degree and Chartered Accountant (CA) over 8 years' relevant HIV/TB & STIs experience = 20 points 						20	
<p>Demonstrated track record in Financial Management must include names and contact details of organizations for which similar work has been conducted in the last five years.</p> <ul style="list-style-type: none"> • Points 2= 1 References Valid (within last five years) • 4= 2 references (valid within the last five years) • 6= 3 references valid within the last five years • 8 = 4 references valid within the last five years • 10 = 5 references valid within the last five 						10	



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ELEMENT	Rating						Maximum Score	Total
years								
Functionality Stage 1						100		

Stage 2: Bidders who obtained 70 on Functionality will be evaluated on Price & BEE using preference point system of 80/20 as per the below table:

Preference point system (80/20)	Weighting percentage (Must add up to 100 %)
Price	80% of 100 Points
Black Economic Empowerment (BEE)	20% of 100 Points
Total:	100%

i. Price Calculations

ii.

A maximum of 80/20 point system has been allocated to this bid on the following basis:

$$P_s = 80 \left(1 - \frac{P_t - P_{min}}{P_{min}} \right)$$

Where

P_s = Points scored for price of bid under consideration

P_t = Price of bid under consideration

P_{min} = Price of lowest acceptable bid

iii. POINTS AWARDED FOR B-BBEE STATUS LEVEL OF CONTRIBUTOR



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In terms of Regulation 6 (2) and 7 (2) of the Preferential Procurement Regulations, preference points must be awarded to a bidder for attaining the B-BBEE status level of contribution in accordance with the table below:

B-BBEE Status Level of Contributor	Number of points (80/20 system)
1	20
2	18
3	14
4	12
5	8
6	6
7	4
8	2
Non-compliant contributor	0

Email proposals to:

Beullah@sanac.org.za

Copied: Mbali@sanac.org.za; Geraldine@sanac.org.za

NB: Service providers to attach their Valid BEE Certificates, Tax Clearance Certificate, Certified ID Copies, Vat Registration Certificate where necessary, CIPC Registration documents. Failure to submit these will invalidate your proposal



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