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## TENDER DOSSIER



### Project Title:

SOCIAL ENTREPRENEURSHIP  
ECOSYSTEM (SEE) CHANGE

Prepared by:

BEYOND GROUP

[beyondgroupconsulting.com](http://beyondgroupconsulting.com)

# DEVELOPMENT OF LEARNING TOOLKITS FOR SESOS TO SUPPORT SOCIAL ENTERPRISES

## REQUEST FOR TENDER

# TABLE OF CONTENTS

<b>SECTION 1 - INSTRUCTIONS TO THE TENDERERS</b> .....	<b>3</b>
GENERAL INSTRUCTIONS .....	3
<b>SECTION 2 - TERMS OF REFERENCE</b> .....	<b>5</b>
PARAGRAPH 1 - ASSIGNMENT DESCRIPTION .....	5
<b>Assignment context and background</b> .....	<b>5</b>
PARAGRAPH 2 – SCOPE OF WORK .....	6
<b>Requested Services</b> .....	<b>6</b>
PARAGRAPH 3 – DURATION AND LOCATION .....	7
PARAGRAPH 4 – QUALIFICATION OF SUCCESSFUL EXPERT .....	8
<b>Availability</b> .....	<b>8</b>
<b>Qualification Criteria of the Experts</b> .....	<b>8</b>
PARAGRAPH 5 - RECOMMENDED PRESENTATION OF PROPOSAL .....	9
<b>Technical Proposal</b> .....	<b>9</b>
<b>Financial Proposal</b> .....	<b>9</b>
PARAGRAPH 6 – SELECTION CRITERIA .....	9
<b>SECTION 3 – CONDITIONS TO TENDERING</b> .....	<b>10</b>
<b>3.1 Tender validity</b> .....	<b>10</b>
<b>3.2 Alteration or withdrawal of tenders</b> .....	<b>10</b>
<b>3.3 Compliance</b> .....	<b>11</b>
<b>3.4 Right to reject all tenders</b> .....	<b>11</b>
<b>3.5 Confidentiality</b> .....	<b>11</b>
<b>3.6 Notification award and contract signature</b> .....	<b>11</b>
<b>ANNEX 1 – FINANCIAL PROPOSAL TEMPLATE</b> .....	<b>12</b>

# SECTION 1 - INSTRUCTIONS TO THE TENDERERS

## General Instructions

A. GENERAL PROVISIONS	
1. Introduction	<p>1.1 The tenderer should meet all the criteria as stated in this Tender</p> <p>1.2 Experts shall adhere to all the requirements of this Tender, including any amendments in writing by Beyond Group</p> <p>1.3 Any tender submission will be regarded as an offer by the tenderer and does not constitute or imply the acceptance of the proposal by Beyond Group. Beyond Group is under no obligation to award a contract to any tenderer as a result of this Tender process.</p>
2. Eligibility	<p>2.1 It is the tenderer's responsibility to showcase eligibility by providing CVs, portfolios, or any supporting documents relevant to this tender's scope</p>
B. PREPARATION OF PROPOSALS	
3. General Considerations	<p>3.1 In preparing the proposal, the tenderer is expected to examine the Tender in detail. Material deficiencies in providing the information requested in the Tender may result in rejection of the proposal.</p> <p>3.2 The tenderer will not be permitted to take advantage of any errors or omissions in the Tender. Should such errors or omissions be discovered, the tenderer must notify Beyond Group.</p>
4. Cost of Preparation of Proposal	<p>4.1 The tenderer shall bear any and all costs related to the preparation and/or submission of the proposal, regardless of whether the proposal was selected or not. Beyond Group shall not be responsible or liable for those costs, regardless of the conduct or outcome of the procurement process.</p>
5. Language	<p>5.1 The proposal, as well as any and all related correspondence exchanged by the tenderer and the contracting Authority, shall be written in the English language.</p>
6. Documents Comprising the Proposal	<p>6.1 The Proposal shall comprise of the following documents:</p> <ul style="list-style-type: none"> <li>a) Technical Proposal</li> <li>b) Financial Proposal (Following annex 1 format)</li> <li>c) Any attachments and/or appendices to the proposal.</li> </ul>
7. Technical Proposal Format and Content	<p>7.1 The tenderer is required to submit a technical proposal using forms of their choice however adhering to the recommended form of the proposal as described in "Paragraph 5"</p> <p>7.2 The technical proposal shall not include any price or financial information. A technical proposal containing material financial information may be declared non-responsive.</p>
8. Financial Proposals	<p>8.1 The financial proposal shall be prepared using the forms of choice. It shall list all major cost components associated with the services, as instructed in "Paragraph 5" of this Tender.</p> <p>8.2 Prices and other financial information must not be disclosed in any other place except in the financial proposal.</p> <p>8.3 The tenderer understands that fees provided in the financial proposal shall remain valid and cannot be increased for the entire validity of the Agreement.</p>
9. Currencies	<p>9.1 All prices shall be quoted in US Dollars</p>
C. SUBMISSION AND OPENING OF PROPOSALS	

<p><b>10. Clarifications</b></p>	<p>10.1 Any requests for clarification shall be submitted to <a href="mailto:seechange@beyonddr.com">seechange@beyonddr.com</a> by May 5, 2023</p>
<p><b>11. Form Of Submission</b></p>	<p>11.1 Proposal submission is only accepted through soft copy submission by email as follows:</p> <ul style="list-style-type: none"> <li>a) Electronic files that form part of the proposal must be in accordance with the format and requirements indicated in Tender</li> <li>b) The Proposal shall be signed by the tenderer</li> <li>c) The Technical Proposal and the Financial Proposal files MUST BE COMPLETELY SEPARATE.</li> <li>d) Please include the following in the subject of your submission email "SEE Change Toolkit Development Tender - <i>tenderer name</i>"</li> <li>e) Submission shall be sent to the following email: <a href="mailto:seechange@beyonddr.com">seechange@beyonddr.com</a></li> </ul>
<p><b>12. Deadline for Submission of Proposals and Late Proposals</b></p>	<p>12.1 Proposals must be received by Beyond Group no later than <b>May 14, 2023, at 18:00 Beirut Time</b></p> <p>12.2 Beyond Group shall not consider any proposal that is submitted after the deadline for the submission.</p>

# SECTION 2 - TERMS OF REFERENCE

## Paragraph 1 - Assignment Description

### **ASSIGNMENT CONTEXT AND BACKGROUND**

SEE Change Consortium, formed of Oxfam, COSV, and Beyond Group (BG) is implementing the Social Entrepreneurship Ecosystem Change (SEE Change) project funded by the EU. The project focuses on Social Entrepreneurship (SE) as a tool to support local development and enhance social stability. The consortium aims to strengthen social enterprises (SEs) to respond to the social and economic situation in Lebanon and advance the legal and institutional framework for SE. Under the SEE Change project, consortium members will:

1. Provide tailored capacity development trainings for community members on SE
2. Develop a community-led accountability framework for SEs
3. Support community monitoring of the economic and social impact of SEs
4. Provide financial and non-financial support to SEs
5. Develop social justice incubation program for new Initiatives of social start-ups
6. Provide capacity development support to Social Enterprise Support Organizations (SESOs)
7. Strengthen the networking and knowledge exchange between SESOs
8. Support the existing networks working on SE
9. Support the legal and institutional framework for SE in Lebanon through technical expertise and advocacy actions

The component related to the SESOs aims at building the capacity of these structures and strengthening the networking and knowledge exchange between them. To do so, Beyond Group has conducted a needs assessment of a sample of SESOs, of different sizes, operating in various regions in Lebanon. The assessment identified key learning topics to focus on, in addition to recommendations for the implementation of the capacity building activities.

Accordingly, Beyond Group has developed a capacity building program targeting new and well-established SESOs in various regions in Lebanon, and which includes training, coaching, and exchange learning activities. The program covers a range of basic and advanced topics needed to develop the internal capacity of SESOs in order to improve their internal processes, enhance their support programs, and provide better services for social entrepreneurs.

Beyond Group would like to complement the learning process by developing learning toolkits and manuals on selected topics that will be shared with partner SESOs as well as posted online to ensure wider access.

## Paragraph 2 – Scope of Work

### REQUESTED SERVICES

Beyond Group seeks to contract the services of an organization or individual consultant in developing five modules as a toolkit to be used by the SESOs to develop their services and provide better support to SEs. These will be disseminated by Beyond Group to the beneficiary SESOs and online.

The toolkit will cover 5 modules that were identified and delivered in the capacity building program, which are the following:

Modules	Brief Description
<b>Introduction - Social Entrepreneurship in Lebanon</b>	<ul style="list-style-type: none"> <li>● Social Entrepreneurship definition</li> <li>● SE models and objectives</li> <li>● Business phases of SE</li> <li>● Challenges and needs in Lebanon</li> </ul>
<b>Module 1 - Sustainable and Impactful SE Modelling</b>	<ul style="list-style-type: none"> <li>● Innovation / Design Thinking Methods</li> <li>● Needs Assessment</li> <li>● Exploring alternative sources of revenue streams</li> <li>● Defining the vision</li> <li>● Stakeholder Engagement</li> <li>● Ethical sourcing</li> <li>● Risk assessment &amp; management</li> </ul>
<b>Module 2 - SE Scaling models</b>	<ul style="list-style-type: none"> <li>● Growth potential</li> <li>● Sustainable upscaling</li> </ul>
<b>Module 3 - Social Impact Management</b>	<ul style="list-style-type: none"> <li>● What is social impact?</li> <li>● Defining and validating the problem</li> <li>● Framing the social impact</li> <li>● Social Impact Measurement Framework               <ul style="list-style-type: none"> <li>○ Approaches and processes</li> <li>○ Developing Assessment and Measurement Criteria</li> <li>○ Communicating the social impact measured</li> <li>○ Integrating SDGs</li> </ul> </li> <li>● Monitoring &amp; Evaluation               <ul style="list-style-type: none"> <li>○ Guidance on Framework</li> <li>○ Methods of verifications</li> <li>○ Useful tools</li> </ul> </li> </ul>
<b>Module 4 - International Market Access</b>	<ul style="list-style-type: none"> <li>● Overview of Market Access Analysis               <ul style="list-style-type: none"> <li>○ Identifying market needs</li> <li>○ Facilitation of access to new markets</li> </ul> </li> <li>● Legal registration and International Market Access</li> <li>● Legal requirements and procedure</li> <li>● Market Access Strategies</li> </ul>
<b>Module 5 - Impact Fund Management</b>	<ul style="list-style-type: none"> <li>● Designing an impact fund and raising capital</li> <li>● Managing and marketing an impact fund</li> <li>● Investment readiness of SEs</li> <li>● Reporting to investors</li> </ul>

In terms of content, the tenderer should ensure the following:

- The learning outcomes of the toolkit are useful for the SESOs to apply internally as well as to provide better support to SEs.
- The toolkit takes into consideration the project's overall objectives, with specific focus on social entrepreneurship targeting local communities and refugees, in particular women and youth.
- The toolkit content is based on the content given and the feedback received during the capacity building program. The tenderer should examine the training manuals and reports (developed by the experts delivering the material) and maintain consistency in terms of content (including tools shared), and address observed challenges and fill any gaps.
- The toolkit's topics are subject to amendments based on feedback from the capacity building program and consortium partners, and based on the tenderer's approach, expertise, and experience.

The expert is required to coordinate closely with Beyond Group and consortium partners during the preparation and

finalization of the toolkits for feedback and validation.

The toolkit's structure has to be optimized such that the SESOs can incorporate the content into their programs and activities to better support SEs and could include:

- Clear guidelines and Frameworks
- Tools (standards from the industry or tailored tools that meet the learning needs of the SESOs)
- Best practices
- Dos & Dents (tips and tricks)
- Case studies (relevant to the context, examples from SESOs and SEs)

The toolkit should be visually appealing, interactive, and engaging to ensure an efficient and enjoyable learning experience. The tenderer should provide a plan for incorporating multimedia elements such as videos, infographics, case studies and interactive exercises to enhance the usability and effectiveness of the toolkit.

The tenderer should propose a user-friendly format for the toolkit that can be shared with the beneficiaries and uploaded online for the public. The online format should be easily accessible, responsive, and compatible with different devices and browsers. Beyond Group will also share the toolkit on the SEEN<sup>1</sup> platform.

The toolkit must be developed in both English and Arabic, and designed based on the SEE Change guidelines. In addition, the content should be easily customizable and translatable, as the toolkit may be updated at a later stage.

The following services are expected to be delivered:

- Review the project documents and hold meetings with Beyond Group to understand the context and tailor the content accordingly
- Prepare a plan and outline of the toolkit and share it with Beyond Group for validation
- Prepare a draft of the toolkit and share it with Beyond Group for feedback
- Conduct a validation workshop with a few selected SESOs and consortium partners
- Incorporate the received feedback/inputs and finalize the toolkit
- Submit a designed version of the toolkit in both English and Arabic
- Incorporate feedback received from the EU

Please note that, upon submission, the toolkits copyright will belong to the SEE Change Consortium. The SEE Change partners will have the right to use, publish, and distribute the toolkits for the intended purposes of the project, including but not limited to, sharing it with social entrepreneurship support organizations, stakeholders, beneficiaries, and the general public. The tenderer should ensure that the toolkit does not infringe on any third-party copyrights or intellectual property rights, and should outline any limitations or conditions related to the use, publication, or distribution of the toolkit by the project partners.

## Paragraph 3 – Duration and Location

The development of the toolkits is planned to be carried out from **June 1, 2023**, through to **September 29, 2023**.

The tenderer should account for feedback and validation time from Beyond Group and the EU.

The scope of activities for the development of the toolkit modules can be effectively carried out remotely.

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<sup>1</sup> SEEN is an online platform built by Beyond Group within the SEE Change project to support the social entrepreneurship ecosystem in Lebanon, by accessing networks, data, and resources.

## Paragraph 4 – Qualification of Successful Expert

### AVAILABILITY

The contracted tenderer shall make sure to provide the adequate time allocation and efforts, to efficiently complete the activities required under the scope of this assignment.

### QUALIFICATION CRITERIA OF THE EXPERTS

The tenderer can propose one or more experts for the development of the various modules. The following qualifications are required for the proposed experts to be considered eligible. Tenderers who do not meet these criteria will not be considered for selection.

#### General Qualifications:

- At least 12 years of experience in the design and facilitation of capacity building activities and learning materials, in the field of social entrepreneurship or related areas.
- Knowledge of principles and methods for curriculum and content design of learning modules and toolkits.
- Demonstrated track record of developing high-quality and user-friendly online resources for capacity building purposes.
- Thorough knowledge regarding social entrepreneurship is a must (at least 10 years in the sector); knowledge of the sector contextualized to vulnerable communities (such as refugees, women, youth) is an asset.
- Previous experience in providing capacity building activities for Social Enterprise Support Organizations is a must.
- Proven analytical skills and ability to conceptualize and write concisely and clearly.
- Relevant experience in the MENA region is essential; experience in Lebanon and knowledge of the local SE ecosystem is an asset.
- Excellent writing and oral communication skills in English; Arabic is a plus.

#### Additional Specific expertise needed per Module:

In addition to the above, the proposed team of experts should meet a maximum of the qualification criteria listed below:

Topic	Related qualifications
1. Sustainable and Impactful SE Modeling	<ul style="list-style-type: none"><li>● Extensive knowledge of the submitted SE legal framework in Lebanon</li><li>● Extensive Knowledge of sustainable and impactful SE business models</li><li>● Strong recognition of the uniqueness of sustainable business models and relevant business activities in comparison to traditional models</li><li>● Experience in conducting risk analysis exercises and management strategies</li></ul>
2. SE Scaling models	<ul style="list-style-type: none"><li>● Experience in building scalable business models and/or best measures in scaling SEs</li><li>● A deep knowledge of optimal business scale up models</li><li>● A well-rounded understanding of optimizing capital management, investments, labor, and services for scale up</li></ul>



3. Social Impact Identification and Measurement	<ul style="list-style-type: none"> <li>● Experience in impact identification, analysis, assessment and management</li> <li>● A solid understanding of different impact measurement frameworks and the ability to adapt them to the local context</li> <li>● Experience in setting up and running impact measurement, KPIs and data collection, and relevant reporting/M&amp;E frameworks</li> <li>● Knowledge of SDGs and how to integrate them in impact measurement</li> </ul>
4. International Market Access	<ul style="list-style-type: none"> <li>● Extensive knowledge of determining the relevant applicable industry-specific regulations</li> <li>● Experience in managing product compliance for international growth purposes</li> <li>● Strong grasp on developing effective access to market strategies</li> </ul>
5. Impact Fund Management	<ul style="list-style-type: none"> <li>● A solid understanding of the investment and impact thesis</li> <li>● A proven ability to navigate fund foundations and structure set up</li> <li>● Experience in funds management and guiding financial principles</li> <li>● Possession of industry proven insights on the most optimal fund management approaches</li> </ul>

## Paragraph 5 - Recommended Presentation of Proposal

A technical proposal and a financial proposal are requested separately, the technical proposal shouldn't include any financial information and vice versa.

### TECHNICAL PROPOSAL

The technical proposal presents the methodology on how the tenderer will approach and complete the assignment. The tenderer is expected to elaborate on the Terms of reference and propose its technical proposal with a redefinition of deliverables and timeline as understood by them. The tender should include:

- A detailed methodology and description of the services offered
- A detailed CV of the personnel engaged in the assignment
- Samples of previous relevant work in the form of project abstracts/outcomes/briefings
- A detailed workplan showcasing the milestone/respective delivery dates
- A clear financial registration information of the organization or consultant and any details that might be required for billing purposes, if applicable.

### FINANCIAL PROPOSAL

The Financial proposal shall include all costs to be incurred in the design and implementation of the scope of the work.

- The tenderer shall provide their financial proposal in USD and in a detailed breakdown form to include all costs related to the preparation and the delivery of each activity (Following annex 1 format).

## Paragraph 6 – Selection Criteria

The evaluation panel will first review each response for compliance with the mandatory requirements of this Tender. Failure to comply with any of the requirements contained in this Tender, including provision of all required information, may result in a response or proposal being disqualified from further consideration.

Each valid proposal will be assessed by an evaluation panel first on its technical merits and subsequently on its financial

proposal.

To be further considered for the financial evaluation a minimum score of 60 points is required. Only proposals with a score of 60 or more points in the technical evaluation will be financially evaluated (i.e. the financial proposal will be opened). For further details and the distribution of points kindly refer to table 1 below.

**Table 1: Evaluation Criteria and Distribution of Points**

CRITERIAS	Award criteria	Score up to	Max. Score
Capability of tenderer to perform the work/service required	Specific experience in the field concerned with proven track record, knowledge, and delivery capacity as listed under the qualification requirements	35	40
	Previous successful collaboration(s) with Beyond Group	5	
Quality / Understanding of requirements	Meeting technical specifications (methodology, plan, frameworks, etc...); Level of understanding of work/service required; Quality, adequacy, and details of the proposed services	35	40
	Ability to meet delivery dates OR Reliability of plan proposed	5	
Prices for goods/work/services	Clarity of the cost breakdown	5	20
	Price proposal of Goods/Services in accordance with the request (best value for money)	15	
<b>TOTAL MAXIMUM GENERAL SCORING</b>			<b>100</b>

**Beyond Group reserves the right to:**

- a) Award the contract to a bidder of its choice, even if its bid is not the lowest;
- b) Award separate contracts for parts of the work, components or items, to one or more bidders of its choice, even if their bids are not the lowest;
- c) Award the contract on the basis of the Organization's particular objectives to a bidder whose proposal is considered to be the most responsive to the needs of the Organization and the activity concerned
- d) Not award any contract at all.

Beyond Group has the right to eliminate bids for technical or other reasons throughout the evaluation/selection process. Beyond Group shall not in any way be obliged to reveal, or discuss with any bidder, how a proposal was assessed, or to provide any other information relating to the evaluation/selection process or to state the reasons for elimination to any bidder.

## SECTION 3 – CONDITIONS TO TENDERING

### 3.1 TENDER VALIDITY

Tenders shall remain valid for a period of 15 calendar days after the deadline for receipt of tenders.

### 3.2 ALTERATION OR WITHDRAWAL OF TENDERS

Tenderers may alter or withdraw their tenders by written notification prior to the deadline for submission of tenders referred to in Article 2. No tender may be altered after this deadline. Withdrawals must be unconditional and will end all participation in the tender procedure.

### **3.3 COMPLIANCE**

Beyond Group reserves the right to reject all bids not submitted in the format specified and any bids where any of the required forms are not completed.

### **3.4 RIGHT TO REJECT ALL TENDERS**

Beyond Group is under no obligation to accept any tender.

### **3.5 CONFIDENTIALITY**

Tenderers must treat the invitation to tender and all associated documentation supplied by Beyond Group as confidential.

Beyond Group guarantees that tender offers shall remain confidential till the contractual phase.

### **3.6 NOTIFICATION AWARD AND CONTRACT SIGNATURE**

The successful tenderer will be informed in writing that their tender has been chosen (notification of award). Beyond Group will then agree with the selected tenderer on the final contract version. Within 7 to 15 working days following the reception, the successful tenderer will sign, date and send back the contract.

Note that the successful tenderer shall then confirm availability or unavailability within 3 days from the date of the notification of award. In case of non-availability, Beyond Group will decide on how to proceed whether by either contracting with the next tenderer or republishing the tender.

The unsuccessful tenderer will be informed by e-mail within the 7 days following the award.

# ANNEX 1 – FINANCIAL PROPOSAL TEMPLATE

Financial Proposal Template		
Presented to:	<b>Beyond Group</b>	
Project:	<b>SOCIAL ENTREPRENEURSHIP ECOSYSTEM (SEE) CHANGE</b>	
Assignment:	<b>DEVELOPMENT OF LEARNING TOOLKITS AND MANUALS FOR THE SUPPORT OF SOCIAL ENTERPRISES</b>	
Tenderer:		
Expert(s):		
Date:		
Cost breakdown by assignment deliverables (based on the ToR)		
#	Deliverable	Total fees (\$)
1	Review the project documents and hold meetings with Beyond Group to understand the context and tailor the content accordingly	
2	Prepare a plan and outline of the toolkit and share it with Beyond Group for validation	
3	Prepare a draft of the toolkit and share it with Beyond Group for feedback	
4	Conduct a validation workshop with a few selected SESOs and consortium partners	
5	Incorporate the received feedback/inputs and finalize the toolkit	
6	Submit a designed version of the toolkit in English	
7	Submit a designed version of the toolkit in Arabic	
8	Incorporate feedback received from the EU	
<b>Total assignment cost</b>		<b>\$ -</b>
Signature		