

## **Terms of Reference (ToR) for the procurement of Impact Investment Readiness trainings for the YELA Program**

### **CONTEXT**

The Youth Employment in Lebanon through Social Enterprise (YELA) program

Alfanar, a pioneer of Venture Philanthropy in the Arab world, is implementing under a grant agreement with GIZ/EPL a sustainable approach that supports early and growth stage Social Enterprises (SEs) that will create a significant number of jobs and decent income opportunities for the target beneficiaries of the GIZ Employment Program, namely for youth from Beirut and Mount Lebanon. Strengthening the social enterprise sector and helping youth access more income and employment opportunities, including through freelance opportunities, will help alleviate the impact of the economic crisis on young people and slow down the mass exodus that the country has been witnessing.

The overarching impact objective of the YELA program is to provide increased access to decent income and employment opportunities for youth, women and Persons with Disabilities from Beirut and Mount Lebanon (or those who are working there) via strengthened Social Enterprises.

To achieve its development impact, the YELA Program is structured around 2 Streams with activities, outputs, and target KPIs directly linked to close knowledge, capital, and network gaps for SEs in order to help them reach their employment targets.

**Stream 1 – Creating opportunities for individuals:** Provide training, income and employment opportunities to 626 youth from Beirut and Mount Lebanon or working there (incl. at least 35% women and 24 Persons with Disabilities), by scaling the business of 6 SEs in the ICT, Construction, Electrical, Artisanal and Disability Inclusion Sectors, through access to capital and management support. The support provided to strengthen these 6 SEs will allow youth to be provided with employment and income opportunities in a sustainable and long-term fashion, long after the YELA Program ends.

**Stream 2 – Supporting social enterprises:** Support **26 Social Enterprises** (incl. at least 35% women-led), that operate in Beirut and Mount Lebanon, by providing capital and management support to 20 SEs through Alfanar's SEED Program, impact management to 26 SEs, to expand their reach to Lebanese youth as well as local & international markets, thereby strengthening their financial sustainability and their impact in terms of employment.

Among the 26 SEs mentioned above, 6 SEs have already been selected, over the entire YELA program timeframe, and twenty SEs will need to be selected through a competitive process, and then split into cohorts of five SEs to be supported one after the other over a six months' timeframe. All the SEs will be provided with funding and management support through Alfanar.

The YELA program was launched in August 2022 and will last until September 2024.

The assignment covers the period from **July 15<sup>th</sup> 2024** till **August 15<sup>th</sup> 2024**.

## OBJECTIVES

The contractor is responsible for creating the Impact Investment Readiness training module and providing training for Alfanar team as well as a training for up to 26 Social Enterprises (SE) part of the YELA program. The objectives of the assignment will be:

- A- **Impact Investment Readiness:** Increasing social enterprises capacity for making positive social and environmental impact: through supporting social enterprises in expanding their influence, offering valuable insights into investor expectations, aids in preparing for funding opportunities, improving business expertise, refining presentation abilities and pitching skills, facilitating networking and access to opportunities, and encouraging ongoing learning and enhancement.
  
- B- **Impact Investment Support:** Building the capacity of Alfanar team members on the topic of impact investment readiness for social enterprises in Lebanon and providing training and recommendations on how to best support social enterprises.

## TOPICS TO COVER

1. Understanding the impact investment landscape
2. Assessing your investment readiness level
3. Skills for attracting investments
4. Exploring investment opportunities
5. Pitching to investors and feedback

## DELIVERABLES

1. Prepare and present a workplan and a timeline to the Alfanar team that starts on July 15th and ends on August 15<sup>th</sup>, 2024, including:

### A- **Impact Investment Readiness:**

- Topic should be tailored to 2 groups; 6 Sustain (Social Enterprises that are at a growth stage and part of Alfanar's long term investment portfolio, they are receiving funds and business management support from Alfanar under YELA program for 2 years) and 20 Seed (Social Enterprises that are at an early stage and are receiving 6-month funding and business management support from Alfanar under YELA program)

#### **A.1 deliverables for Seed SEs:**

- 3 in person group sessions (of 4 hours each) covering the 5 above topics

- 1 one on one session with each of 20 Seed SEs

### **A.2 deliverables for Sustain SEs:**

- 3 in person group sessions (of 4 hours each) covering the 5 above topics
- 1 online one to one session with each of 6 Sustain SEs

In addition to 1 group session for both Seed and Sustain SEs, to practice and demo their impact investment readiness to investors from the Lebanese ecosystem, invited as guests to attend and evaluate the SEs (Donors, VCs, Angel Investors, Impact Funds, Individual Philanthropists, etc.).

### **B- Impact Investment Support:**

- Topic should be tailored to Alfanar team members:
    - 1 in person full day training to equip 8 Alfanar team members with the knowledge and skills necessary to prepare and support entrepreneurs and businesses in attracting investments.
2. Develop training content for the 5 topics above
  3. Deliver a total of 6 group sessions of 4 hours each around each of the 5 topics
  4. Deliver a matching demo group session pitch with potential investors
  5. Deliver a total of online up to 26 one to one session of 1 hour each
  6. Prepare and present a final report of all the deliverables and activities, listing all the outcomes, output resulting of all the sessions delivered, and highlighting challenges faced with the SEs if any.

### **QUALIFICATIONS**

- Proven relevant experience in Impact Investment Readiness
- Experience mentoring social enterprises is preferred
- Strong communication and presentation skills
- Able to meet deadlines with high quality deliverables
- Self-motivated, autonomous and pro-active
- Team player with a collaborative attitude and open to feedback

### **COSTING REQUIREMENTS**

(Annex C)

### **TIMEFRAME**

Applicants should propose a suitable deliverable milestone with a final delivery of training by August 2024.

Applicants must describe the key processes for the services and create a schedule describing how they are to be provided, specifying the necessary work steps and milestones.

## **CONFIDENTIALITY**

All documents that are shared with applicants and produced by them are confidential and should not be shared with any person outside of Alfanar without the consent of our Investment Director.

## **APPLICATION PROCESS**

Interested applicants are requested to submit a technical and financial proposal submitted in the below form to [sabine@alfanar.org.uk](mailto:sabine@alfanar.org.uk) by July 5<sup>th</sup>, 2024:

**Annex A:** methodology and approach (Word or PDF format)

**Annex B:** workplan and timeline from July 15 to August 15 (Word or Excel format)

**Annex C:** budget (please use the attached Word file and make sure the budget lines are strictly followed)

**Annex D:** CV and portfolio (Word or PDF format)

Any other documents that would support showcasing their previous experience and relevant skills can also be added to the submission. Individual consultants as well as firms are both equally encouraged to apply for the consultancy.

## **FORMAT REQUIREMENTS**

The tender must be legible (font size 11 or larger) and clearly formulated. It must be drawn up in English.

The complete tender must not exceed 10 pages (excluding CVs). If one of the maximum page lengths is exceeded, the content appearing after the cut-off point will not be included in the assessment. External content (e.g., links to websites) will also not be considered.

The CVs of the personnel proposed shall not exceed 4 pages each. The CVs should also be submitted in English (language). Please calculate your financial tender based exactly on the parameters specified in the costing requirements. The contractor is not contractually entitled to use up the days, trips, workshops, or budgets in full. The number of days, trips and workshops and the budgets will be contractually agreed as maximum limits. The specifications for pricing are defined in the price schedule.

**For companies:** The contract shall provide along with financial proposal the legal papers of the company (e.g. registration documents, MoF document and number...). Bidders that are not registered will be disqualified.

**For individuals:** the contract shall provide along with financial proposal, the legal registration number (MoF number). If the contractor is not registered, they are subject to tax deductions.