Terms of reference (ToR) for the procurement of services below the EU threshold

CONFIDENTIAL

Implementation of Shea R.I.S.E (Resilient Infrastructure for Shea Ecosystems) in Northern Ghana	**Project number/ cost centre: G-018082-001** **Tender number**

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0. List of abbreviations

AG	Commissioning party
AN	Contractor
AVB	General Terms and Conditions of Contract for supplying services and work
FK	Expert
FKT	Expert days
KZFK	Short-term expert
ToRs	Terms of reference
PSInno	Private Sector and Innovation Promotion in Ghana
SMEs	Small and Medium Enterprises
GIZ	Deutsche Gesellschaft für Internationale Zusammenarbeit
BMZ	German Federal Ministry for Economic Cooperation and Development
MoTAI	Ministry of Trade, Agribusiness and Industry

1. Context

The Private Sector and Innovation Promotion in Ghana (PSInno) programme is commissioned by the German Federal Ministry for Economic Cooperation and Development (BMZ), and is jointly implemented with the Ministry of Trade, Agribusiness and Industry (MoTAI). The programme enhances the competitiveness of small and medium-sized enterprises, primarily in the agribusiness and digital economy sectors. By doing so, it fosters innovation and creates new jobs. PSInno's agribusiness component builds the technical and entrepreneurial capacities of private-sector actors in the agri-food sector in northern Ghana, especially women and young people. This is expected to lead to the strengthening of the competitive and employment-creating economic development of companies in the agricultural sector in northern Ghana.

Shea is a strategic rural economy for northern Ghana and the wider West African shea belt, supporting an estimated 16 million women while contributing to biodiversity, local food systems, and climate resilience. Women generate value at source, but many producer groups lack the systems that make rural enterprise possible: formal cooperative structures, elected governance, bank accounts, treasury rules, payment records, working-capital systems, traceability records, and accountable management.

PSInno has partnered with the Savannah Fruits Company (SFC) in the implementation of the Resilient Infrastructure for Shea Ecosystems (Shea R.I.S.E.) project to tackle some of these challenges. In this regard, the project intends to transition 16 cooperative-owned post-harvest shea centres into autonomous, formally governed, women-led, bankable, market-linked and digitally traceable rural enterprises, while proving a practical just-transition model for shea's first mile in northern Ghana.

Objective

The objective of this assignment is to engage an expert to support the implementation of the Shea R.I.S.E. project, with the aim of formalising shea collectors and processors into business-oriented women-led cooperatives and demonstrating a scalable, market-linked, traceable, and sustainable model for transforming Ghana's rural shea value chain.

2. Tasks to be performed by the contractor

The contractor is responsible for providing the following services:

a. Methodology and Training Material Development

- Develop the Autonomous Business Transition Methodology, integrating cooperative formalisation, governance, operational management, financial management, mechanisation, traceability, and centre autonomy.
- Design centre-level business and financial systems covering revenue flows, cost structures, reserve and maintenance funds, working capital, procurement, bookkeeping, cash controls, reporting, and profit allocation
- Develop financing models for seasonal operations, shea procurement and mechanisation investments, including pre-financing, working capital, asset ownership structures, repayment mechanisms, and performance requirements
- Prepare Centre Manager manuals, financial and operational management tools, reporting templates, machine and maintenance logs, production and inventory records, procurement records, and traceability forms

- Design the RISE Fellows model as the youth operating layer for the centres
- Design and print training materials and implementation toolkits for cooperative leaders, Centre Managers, operators, field officers, and RISE Fellows covering governance, business operations, financial management, mechanisation, and reporting

b. **Cooperative Formalization, Registration & Training**
   - Begin cooperative registration and formalisation processes across the 16 selected centres.
   - Roll out governance structures, committee roles, treasury rules, and reporting systems.
   - Support bank account readiness, payment records, asset-use rules, and maintenance responsibilities
   - Execute formal offtake agreements between SFC and the 16 cooperatives.

c. **Reporting**
   - Progress and final reports of assignment, including requisite datasets collected, lessons learned and recommendations

The following reports must be produced:

- **Inception report** will be submitted one week after the inception meeting.
- **Progress report** will be submitted every six months.
- **Final report** will be submitted at the end of the implementation
- All report should use the following structure. If more detailed information should be shared, please make use of an annex for which no page limit exists.
  - Not exceeding 16 pages, font: Arial, single-spaced, font size: 11.
  - Title page (1 Page)
  - Table of content (1 Page)
  - Abbreviations (1 Page)
  - Executive summary (1 Page)
  - Introduction and context (2 Pages)
  - Methods (3 Pages)
  - Results and discussion (focus on impacts) (5 Pages)
  - Conclusion and recommendations (2 Pages)

The reports should provide information about the progress made towards objectives in each of the monitoring areas specified above.

Certain milestones, as laid out in the table below, are to be achieved during the contract term:

Table 1. Milestones

Activity	**Milestones**	**Date / Location**
Inception and preparatory activities	Inception meeting and reporting	December 2026 / Homebased
	Initial assessment visit to all centres	December 2026 / Cooperative locations
Methodology and Training Material Development	Develop the Autonomous Business Transition Methodology, integrating cooperative formalisation, governance, operational management, financial management, mechanisation, traceability, and centre autonomy.	March 2027 / Homebased
	Design centre-level business and financial systems covering revenue flows, cost structures, reserve and maintenance funds, working capital, procurement, bookkeeping, cash controls, reporting, and profit allocation	March 2027 / Homebased
	Develop financing models for seasonal operations, shea procurement and mechanisation investments, including pre-financing, working capital, asset ownership structures, repayment mechanisms, and performance requirements	March 2027 / Homebased
	Prepare Centre Manager manuals, financial and operational management tools, reporting templates, machine and maintenance logs, production and inventory records, procurement records, and traceability forms	March 2027 / Homebased

Activity	Milestones	Date / Location
	Design the RISE Fellows model as the youth operating layer for the centres	March 2027 / Homebased
	Design and print training materials and implementation toolkits for cooperative leaders, Centre Managers, operators, field officers, and RISE Fellows covering governance, business operations, financial management, mechanisation, and reporting	March 2027 / Homebased
Cooperative, Formalisation, Registration & Training	Cooperative registration and formalisation processes across the 16 selected centres.	April 2027 / Cooperative locations
	Set up governance structures, committee roles, treasury rules, and reporting systems.	April 2027 / Cooperative locations
	Support bank account readiness, payment records, asset-use rules, and maintenance responsibilities	April 2027 / Cooperative locations
	Execute formal offtake agreements between SFC and the 16 cooperatives.	April 2027 / Cooperative locations
Reporting	Progress and finals report of assignment, including requisite datasets collected, lessons learned and recommendations	May 2027 / Homebased

Period of assignment: December 2026 – May 2027

3. Concept

In the tender, the tenderer is required to show *how* the objectives defined in Chapter 2 (Tasks to be performed) are to be achieved, if applicable under consideration of further method-related requirements (technical-methodological concept). In addition, the tenderer must describe the project management system for service provision.

Technical-methodological concept

Strategy (1.1): Following this, the tenderer presents and justifies the explicit strategy with which it intends to provide the services for which it is responsible (see Chapter 2 Tasks to be performed) (1.1.2).

Cooperation (1.2): The tenderer is required to present the actors relevant for the services for which it is responsible (1.2.1) and describe the cooperation strategy (1.2.2).

Steering structure(1.3): The tenderer is required to present and explain its approach to steering the measures with the project partners (1.3.1) and its contribution to the results-based monitoring system (1.3.2).

Processes (1.4): The tenderer is required to describe the key processes for the services for which it is responsible and create an operational plan or schedule (1.4.1) that describes how the services according to Chapter 2 (Tasks to be performed by the contractor) are to be provided. In particular, the tenderer is required to describe the necessary work steps and, if applicable, take account of the milestones and contributions of other actors (partner contributions) in accordance with Chapter 2 (Tasks to be performed) (1.4.2).

Learning and innovation (1.5): The tenderer is required to describe its contribution to knowledge management for the partner (1.5.1) and GIZ and to promote scaling-up effects (1.5.2) under learning and innovation.

Project management of the contractor (1.6): The tenderer is required to explain its approach for coordination with the GIZ project (1.6.1). In particular, the project management requirements specified in Chapter 2 (Tasks to be performed by the contractor) must be explained in detail. The tenderer is required to draw up a personnel assignment plan with explanatory notes that lists all the experts proposed in the tender (1.6.2); the plan includes information on assignment dates (duration and expert days) and locations of the individual members of the team complete with the allocation of work steps as set out in the schedule.

4. Personnel concept

The tenderer is required to provide personnel who are suited to filling the positions described, on the basis of their CVs (see Chapter 7), the range of tasks involved and the required qualifications.

Key expert

Tasks of key expert

- Overall responsibility for the advisory packages of the contractor
- Responsibility for taking cross-cutting themes into consideration (for example, gender equality)
- Ensuring that monitoring procedures are carried out
- Regular reporting in accordance with deadlines
- Responsibility for checking the use of funds and financial planning in consultation with the commission manager at GIZ

Qualifications of key expert

Education/training (section 2.2.1 of the assessment grid):	BSc. degree in Agriculture, Environment and Natural resources, Rural development, Development studies or other related fields
Language (section 2.2.2 of the assessment grid):	Excellent analytical, writing, and communication skills in English

General professional experience (section 2.2.3 of the assessment grid):	More than ten (10) years of demonstrated experience working specifically with shea collectors, processors, women's groups, shea cooperatives, aggregators, processors, buyers, or other actors in the shea value chain.
Specific professional experience (section 2.2.4 of the assessment grid*):*	At least five (5) years' demonstrated experience in forming, formalising, strengthening, and institutionalising farmer or women-led cooperatives, including governance structures, membership systems, leadership development, financial management, and internal controls. This should be indicated and demonstrated in the CV
Leadership/management experience (section 2.2.5 of the assessment grid):	Not Applicable
Region of assignment (section 2.2.6 of the assessment grid):	At least three (3) years of experience in northern Ghana: Northern, Savannah, Upper East and Upper West Regions
Experience in the field of development cooperation (section 2.2.7 of the assessment grid):	Not Applicable
Other - Regional experience (section 2.2.8 of the assessment grid):	Experience working with The Savanah Fruits Company Limited, specifically with their cooperative formalization processes

Soft skills of team members

In addition to their specialist qualifications, the following qualifications are required of the expert:

- Team skills
- Initiative
- Communication skills
- Socio-cultural skills
- Efficient, partner- and client-focused working methods
- Interdisciplinary thinking

5. Costing requirements

Assignment of personnel and travel expenses

Per diem allowances are reimbursed as a lump sum up to the maximum amounts permissible under tax law for each country as set out in the country table in the circular from the German Federal Ministry of Finance on travel expense remuneration (downloadable from the German Federal Ministry of Finance – tax treatment of travel expenses and allowances for international business travel as of 1 January 2026 (GERMAN ONLY)).

Accommodation allowances are reimbursed as detailed in the specification of inputs below.

With special justification, additional accommodation costs up to a reasonable amount can be reimbursed against evidence.

All business travel must be agreed in advance by the officer responsible for the project

Sustainability aspects for travel

GIZ has undertaken an obligation to reduce greenhouse gas emissions (CO_2 emissions) caused by travel. When preparing your tender, please incorporate options for reducing emissions, such as selecting the lowest-emission booking class (economy) and using means of transport, airlines and flight routes with a higher CO_2 efficiency. For short distances, travel by train (second class) or e-mobility should be the preferred option.

CO_2 emissions caused by air travel must be offset. GIZ specifies a budget for this, through which the carbon offsets can be settled against evidence.

There are many different providers in the market for emissions certificates, and they have different climate impact ambitions. The Development and Climate Alliance (German only) has published a list of standards (German only). GIZ recommends using the standards specified there.

Specification of inputs

The number of expert days corresponds to full working days.

Table 2. Assignment of expert and travel days (core activities)

Main Activity	Sub Activity	Expert day	Travel days		
		Key Expert (1 person)	Half Travel Days	Full Travel Days	Overnight accommodation
Inception and preparatory activities	Inception meeting and reporting	2			
	Initial assessment visit to all centres	8	2	8	11
Methodology and Training Material Development	Develop the Autonomous Business Transition Methodology	1			
	Design centre-level business and financial systems	1			
	Develop financing models	1			
	Prepare Centre Manager manuals	1			
	Design the RISE Fellows model	1			

Main Activity	Sub Activity	Expert day	Travel days		
		Key Expert (1 person)	Half Travel Days	Full Travel Days	Overnight accommodation
	Design and print training materials and implementation toolkits	1			
Cooperative Formalisation, Registration & Training	Cooperative registration and formalisation processes	20	2	20	23
	Set up governance structures, committee roles, treasury rules, and reporting systems.				
	Support bank account readiness, payment records, asset-use rules, and maintenance responsibilities				
	Execute formal offtake agreements between SFC and the 16 cooperatives.				
Reporting	Progress and final reports	5			
	Total	41	4	28	34

Travel expense requirements

The firm shall take care of their travel cost and arrangements, calculate and invoice it to GIZ. This would include vehicle operation (including fuel), per diem and accommodation for travels from place of work (office) to the designated regions. Staff accommodation can only be invoiced for field trips to designated regions that necessitate an overnight stay at the destination.

Please base your bid on the following information and GIZ rates in line with the total number of days in table 2:

- **Accommodation**: GHS 550
- **Per diem half travel day**: GHS 225
- **Per diem full travel day**: GHS 450

Transportation

- This assignment involves travel to designated centres in the Northern Ghana (See Annex 1). It is assumed that consultants will use their own vehicles (cars or motorbikes) for these trips. A maximum of up to GHS 85,000 (core activities, Chapter 2), may be included in the bid and can be reimbursed upon submission of supporting evidence (logbooks, fuel receipts, VAT receipts, invoices from rental companies, etc).

- Cost of round-trip flight tickets to designated regions centres would be reimbursed upon submission of evidence by the consultant. A maximum of up to 2 round trips (core activities, Chapter 2), may be included in the bid and can be reimbursed upon submission of supporting evidence.

Other costs

- **Trainings and Workshops:** The cost for training and workshops should be included in the financial offer as a lump sum of up to GHC 20,000. The amount shall cover cost related to trainings and workshop, against evidence (invoices, receipts, etc.). The scope of the costs will be discussed with the PSInno and SFC teams.

- **Operating costs in the country of assignment:** The financial offer will also include provisions for operating costs to support the implementation of the activities and to ensure smooth coordination and implementation like Communication (calls and data for online search), stationery, printing, etc. estimated unit cost is approximately 5% of total cost to be budgeted, with expenditure against evidence.

- **Flexible remuneration item:** A budget of up to 10% of the contract sum can be specified for flexible renumeration, with the use contingent on being clearly applicable to a certain budget line after discussion with the PSInno team.

- **Ghana tax law** applies (7.5% withholding tax).

6. Inputs of GIZ or other actors

GIZ and/or other actors are expected to make the following available:

- GIZ/PSInno
  - Workshops logistics
  - Provision of designated contact person for the contractor.
  - Liaison between other stakeholders and contractor.

- SFC
  - List of Shea Cooperatives
  - Various guidelines and materials necessary for implementation
  - Provision of designated contact person for the contractor
  - Liaison between other stakeholders and contractor
  - Support of the various activities

- Shea Cooperatives
  - Support of the various activities by making themselves, their executives and members available

7. Requirements on the format of the tender

The structure of the tender must correspond to the structure of the ToR. In particular, the detailed structure of the concept (Chapter 3) should be organised in accordance with the positively weighted criteria in the assessment grid (not with zero). The tender must be legible (font size 11 or larger) and clearly formulated. It must be drawn up in English (language).

The complete tender must not exceed 6 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 in accordance with Chapter 4 of the ToRs must be submitted using the format specified in the terms and conditions for application. The CVs shall not exceed 4 pages each. They must clearly show the position and job the proposed person held in the reference project and for how long. The CVs can also be submitted in Eglish (language).

Please calculate your financial tender based exactly on the parameters specified in Chapter 5 Quantitative 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.

8. Annexes

List of Cooperatives and their Location

S/N	COOPERATIVE NAME	District / Region	POST-HARVEST CENTRE 1	POST-HARVEST CENTRE 2
1	Wechiau Hippo Sanctuary Organic Shea Nuts Collectors Coop	Wa West District, Upper West	Kpanfa Post Harvest Center	Wechiau SFC Post Harvest Center
2	Suntaa Maal Sheanuts Pickers Coop (Sawla-Tuna)	Sawla-Tuna-Kalba District, Savannah	Soma Post Harvest Center	Nakpala Post Harvest Center
3	Damongo Sunkpa Sheanuts Pickers Coop	West Gonja Municipal, Savannah	Murugu Post Harvest Center	Zowu Post Harvest Center
4	Bole Noyini Shea Pickers Coop	Bole District, Savannah	Bale Post Harvest Center	Sonyor Post Harvest Center
5	Tumu Gbarakan Sheanuts Pickers Coop	Sissala East Municipal, Upper West	Gbele - Dasima Post Harvest Center	Sentie Post Harvest Center
6	Gushegu Kpugi Sheanuts Pickers Coop	Gushegu Municipal, Northern	Bulugu Post Harvest Center	Kpugi Post Harvest Center

S/N	COOPERATIVE NAME	District / Region	POST-HARVEST CENTRE 1	POST-HARVEST CENTRE 2
7	Savelugu Suglo Mboribuni Sheanuts Pickers Coop	Savelugu Municipal, Northern	Dipali Post Harvest Center	Nyerko Post Harvest Center
8	Navrongo Sheanuts Pickers Coop	Kassena-Nankana Municipal, Upper East	Chaaba-Naaga Post Harvest Center	Kolemgu Post Harvest Center
9	Chiana-Sandema Nipoaba Sheanuts Pickers Coop	Kassena-Nankana West / Builsa North, Upper East	New Nakong Post Harvest Center	Longsa Post Harvest Center
10	Kpalbe Timtooni Sheanuts Pickers Coop	East Gonja Municipal, Savannah	Jinlo Post Harvest Center	Kanjayilli Post Harvest Center