TOR Issuance Due Date: August 14, 2023

Questions Due Date: August 21, 2023

Proposal Submission Due Date: August 28, 2023

Anticipated Start Date: September 20, 2023

SUBJECT: Terms of Reference for Consultancy Services – ‘Student Microenterprise Development in Higher Education’ under the Higher Education System Strengthening Activity in Pakistan

IIE is seeking to contract with a suitable, qualified and experienced consultant interested in providing the services described in the attached Statement of Work (SOW).

The purpose of this Terms of Reference (TOR) is to invite qualified individuals to submit proposals for providing the required services, outlined more fully in Sections III and IV. The successful Offeror will be obligated to enter into an agreement containing the same or substantially similar terms and conditions found at: https://www.iie.org/Work-With-Us/Subawards-Procurements/Solicitations-for-Goods-and-Services. The terms and conditions may be changed, added to, deleted or modified by IIE prior to awarding the agreement.

IIE intends to issue a Consultant Agreement with an initial estimated price of $20,000 (excluding travel), to a suitable individual who demonstrates to have the capacity to deliver quality technical services under the required SOW at a reasonable daily rate.

The remainder of this TOR provides additional information that will allow an offeror to understand the scope of the effort and develop a proposal in the format desired by IIE.

Issuance of this TOR does not constitute an award commitment on the part of the IIE. IIE reserves the right to reject any offer received in response to this request. IIE shall not be liable for any costs incurred by Offeror in the preparation and submission of proposal.

The information presented in this TOR is furnished solely for the purpose of assisting the offeror in making its own evaluation of the Statement of Work and does not purport to be all-inclusive or to contain all the information you may require. This TOR is not an offer by IIE to contract, but rather an attempt to establish a common framework for IIE to evaluate potential suppliers. The offeror should make its own investigations, projections and conclusions to verify independently the information contained in this TOR, and to obtain any additional information that it may require, prior to submitting a proposal.

All questions, comments, requests for clarifications must be sent in writing to USAIDPrograms@iie.org no later than the date and time indicated above. Questions will not be entertained after this date.
If substantive questions are received which affect the response to the solicitation or if changes are made to the closing date and time as well as other aspects of the TOR, this solicitation will be amended. Any amendments to this solicitation will be issued and posted on the IIE’s procurement opportunities website. The worldwide web address is https://www.iie.org/en/Work-With-Us/Subawards-Procurements. Offerors are encouraged to check this website periodically.

Thank you for your interest and we look forward to your participation.

Gwendolyn Schaefer
Senior Program Manager, USAID Programs
Institute of International Education
# Table of Contents

SUBJECT: Terms of Reference for Consultancy Services – ‘Student Microenterprise Development in Higher Education’ under the Higher Education System Strengthening Activity in Pakistan .......................... 1

Table of Contents .............................................................................................................. 3

Statement of Work (SOW) ................................................................................................ 4

I. Background ..................................................................................................................... 4

II. Objectives ..................................................................................................................... 5

III. Activities and Tasks ................................................................................................... 6

IV. Deliverables ............................................................................................................... 7

V. Duration and Location ............................................................................................... 7

Submission Information ................................................................................................... 8

VI. Submission Information ............................................................................................ 8

VII. Evaluation Criteria .................................................................................................. 11

VIII. General Terms and Conditions .............................................................................. 12
Statement of Work (SOW)

I. Background

HESSA
The USAID-funded Higher Education System Strengthening Activity focuses on raising the capacity of Pakistan’s colleges and universities to address the country’s mismatch between graduate skills and modern workplace needs. Government, industry, academia, and international education experts will work together to undertake sustainable policy development, technical skill-building, and the establishment of student support systems.

HESSA is led by the University of Utah, the University of Alabama, and the Institute of International Education (IIE). These implementing partners offer expertise in higher education, university design, administrative leadership, student support, research, curriculum development, and graduate preparedness to help Pakistan reach its potential in delivering competitive graduates to the global workforce.

The team works closely with the Government of Pakistan to prepare sixteen institutions to be best-practice leaders in the country, thereby creating a ripple effect through the Pakistan higher education ecosystem and, in turn, the country’s economic potential.

The project is especially committed to supporting the success of both Pakistani women and disadvantaged students and will work to create pathways of success for these underserved populations.

Improving Graduate Employability Through Supports Services Across the Student Life Cycle
Under HESSA, IIE is responsible for supporting student services at the select sixteen public Pakistani higher education institutions (HEIs). HESSA seeks to enable and empower students—especially women and marginalized students—to access and succeed in higher education by building co-curricular programs that elevate student “power skills” and global competencies, creating strong support networks that set students up for post-graduation successes. Specific student support services that are targeted under HESSA include financial aid, career readiness, student leadership and programming, alumni engagement and development, student microenterprise development, and mental health.

Student Microenterprise Development

The first two years of HESSA implementation (August 2021 - August 2023) have informed the project’s approach to the type of entrepreneurship support that it seeks to provide Pakistani HEIs over the life of the program. First, IIE led the first annual HESSA Student Support Services Summit in July 2022, where representatives from the entrepreneurship centers (namely the Offices of Research, Innovation, and Commercialization) of the higher education institutions shared their opportunities for growth as well as their current barriers. Within that activity, the main takeaway was that universities have traditionally overemphasized the research and commercialization aspect of entrepreneurship without the same level of support for business incubation centers, nor has there been a concerted effort to reach students outside of STEM and business degrees. Following the Summit, IIE then took 16 participants from its partner HEIs on a study tour to Indonesia, where it introduced the training model from its successful USAID JAPRI program and showcased how a variety of Indonesian partners, particularly universities, are inculcating student microenterprise development. The takeaways from the study tour were then developed into HEI strategic plans and indicator management plans at the second Student Support
Services Annual Summit in June 2023. Data from these plans have been incorporated in the Year Three workplan (October 2023 – September 2024).

Consultant
For IIE to deliver the student microenterprise development technical assistance outlined in the Year Three workplan, it seeks the services of a consultant who is an expert in the building business incubators centers within a higher education setting and who is knowledgeable in the following areas:

- Building, strengthening, and advancing business incubation centers in a university setting.
- Developing and leading awareness sessions for local stakeholders on entrepreneurship as a viable career path. Experience developing such interventions for marginalized groups (e.g., woman and persons with disabilities) is also preferred.
- Developing plans and tools for building networks and new partnerships to catalyze the performance and impact of university business incubation centers.
- Developing entrepreneurship curriculum.
- Establishing and/or enhancing local microenterprise ecosystems for youth engagement.
- Identifying donors, securing funds, and developing plans to support self-sustaining business incubation centers on a university campus.
- Design thinking for innovation and business ideation.

II. Objectives

IIE requires the services of a Student Microenterprise Development in Higher Education Consultant to support training and capacity building as well as coaching and mentoring services to the sixteen Pakistani public HEIs participating in HESSA.

The consultant will deliver online and two in-person trainings in Pakistan on topics such as: Building business incubation centers in a university setting; awareness sessions for local stakeholders on entrepreneurship as a viable career path; building networks and new partnerships to catalyze the performance and impact of university business incubation centers; entrepreneurship curriculum; local microenterprise ecosystems for youth engagement; and, donor development and sustainability planning.

The consultant will also conduct regularly scheduled check-ins with the participating higher education institutions to provide individualized coaching and mentoring to ensure the institutions are making progress towards the development and implementation of their strategic plans.

The consultant will work closely with the US-based Senior Program Manager, HESSA staff in Pakistan, other HESSA consultants, and the Pakistani higher education institutions.

The consultancy will be for one year (September 2023 – September 2024) and based on performance and the needs of HESSA, could be extended.
III. Activities and Tasks

- Conduct review of HESSA materials including but not limited to the Pakistani HEIs strategic plans, assessment report, workplan, and program description.

- Ongoing written and verbal communications with the HESSA program team and participating Pakistani HEIs.

- Development of training materials on topics including but not limited to: Building business incubation centers in a university setting; awareness sessions for local stakeholders on entrepreneurship as a viable career path; building networks and new partnerships to catalyze the performance and impact of university business incubation centers; entrepreneurship curriculum; local microenterprise ecosystems for youth engagement; and, donor development and sustainability planning. Delivery of training will be done via video and in-person.

- Development and delivery of student microenterprise development materials for a week-long in-person activity in February 2024 (pending workplan finalization) and the Student Support Services Annual Summit in July 2024 (dates TBC). Both events will take place in Pakistan and will require the consultant to travel to Pakistan.

- On a bi-monthly basis, conduct up to 16 one-hour mentor/institutional capacity building session with each participating Pakistani HEI. The purpose of the session is to answer specific questions the institution may have, provide feedback on the implementation of institutional strategic plans, and serve as a coach and mentor.

- On a quarterly basis, conduct Community of Practice sessions for participating Pakistani HEIs on topics identified by HEIs, project staff, and the consultant as necessary for the advancement of the group’s learning.

- Participate in monthly HESSA staff meetings as required to provide updates, feedback, and assessments about the progress of the higher education institutions and to support adjustments to activities as needed and required by the program.

- Provide inputs for project reporting mechanisms, including reports for in-person and online training activities, online mentoring sessions, community of practice sessions, and any other activities conducted by the consultant within the monthly reporting period.

IIE is seeking the following qualifications for this consultancy.

- Ten years of experience working in the microenterprise development space, with experience building on emerging global trends.

- At least eight years of experience building and advancing a university business incubation center outside of Pakistan.
• Experience with developing and implementing university programming for student microenterprise development outside of Pakistan. Experience implementing such programming for underserved communities is preferred but not required.

• Experience designing and delivering training programs to the higher education community.

• Experience in developing or enhancing the entrepreneurship curriculum is preferred but not required.

• Knowledge and experience with Pakistani or South Asian higher education institutions preferred.

• Experience working on a USAID or other USG-funded program preferred but not required.

IV. Deliverables

• Development of training materials for in-person training in Pakistan in early 2024 and annual summit in July 2024.

• Development of materials for four online events to take place in each quarter.

• Record action items, successes, and challenges after each bi-monthly check-in with each Pakistani higher education institution.

V. Duration and Location

Duration: Consultancy is expected to be from September 2023 – September 2024. Based on the performance of the consultant and the needs of HESSA, the consultancy may be extended annually for up to three years. The level of effort for this consultancy is an estimated 40 days for the year, including travel to Pakistan.

Location: The consultant will conduct work remotely with the exception of the in-person activities in February 2024 and summit in July 2024. Both activities will require the consultant to travel to Pakistan.
Submission Information

VI. Submission Information

This section contains general and specific requirements for submitting the technical and cost proposals. Please ensure completeness in your submission otherwise your proposal will be rejected.

1. This TOR is issued as a public notice to ensure that all interested, qualified and eligible individuals legally residing in the United States or other countries of residence have a fair opportunity to submit proposals. The consultant nationality has to meet the requirements of USAID’s geographic code 937 (the United States, the recipient country, and developing countries other than advanced developing countries, but excluding any country that is a prohibited source). The list of developing countries can be found in the following website https://www.usaid.gov/sites/default/files/2022-05/310maa.pdf.

2. The Offeror is requested to submit a proposal directly responsive to the terms, conditions and clauses of this TOR. The overall proposal shall consist of two (2) physically separated parts: Consultant Qualifications & Experience and Cost Proposal. Alternative proposals will not be considered. Proposals not conforming to this solicitation may be categorized as unacceptable and eliminated from further consideration.

Offerors are allowed to submit only one proposal. If an Offeror participates in more than one proposal, all proposals involving the Offeror will be rejected.

3. Proposals shall be written in English.

4. Proposals must remain valid for a minimum of 120 (one hundred twenty) days. The Offeror may submit its proposal by the following means:

   Electronically – Internet email compatible with MS WORD, Excel and Adobe Acrobat in a MS Windows environment to: USAIDPrograms@iie.org

5. The Offeror should submit its best proposal initially as IIE intends to evaluate proposals and make an award without discussions. However, IIE reserves the right to conduct discussions should IIE deem it necessary.

6. Proposals must be clearly and concisely written and must describe and define the Offeror’s understanding and compliance with the requirements contained in the STATEMENT OF WORK. The subject line of the email submission must reference the TOR number and title.

PART A: Consultant Qualification and Experience

Consultants will be shortlisted based on experience, qualifications and handling similar assignments in the past.

The following are the minimum qualifications and experience expected of the consultant:
• Ten years of experience working in the microenterprise development space, with experience building on emerging global trends.

• At least eight years of experience building and advancing a university business incubation center outside of Pakistan.
• Experience with developing and implementing university programming for student microenterprise development outside of Pakistan. Experience implementing such programming for underserved communities is preferred but not required.

• Experience designing and delivering training programs to the higher education community.

• Experience in developing or enhancing the entrepreneurship curriculum is preferred but not required.

• Knowledge and experience with Pakistani or South Asian higher education institutions preferred.

• Experience working on a USAID or other USG-funded program preferred but not required.

The Consultant Qualification and Experience part shall be limited to five (5) five pages in total. Pages in excess of 5 pages will not be read or evaluated.

Detailed information should be presented only when required by specific TOR instructions. Items such as graphs, charts and tables may be used as appropriate but will be considered part of the page limitation. Resumes, bio-data sheets, references and dividers are not included in the page limitation. No material may be incorporated in the proposal by reference, attachment, appendix, etc. to circumvent the page limitation.

1. **Offeror Information:**
   - Individual’s legal name;
   - Copy of national identification document;
   - Individual’s E-mail address, physical address and telephone number

2. **Technical Approach:** In a narrative – not to exceed two (2) pages – the Offeror will demonstrate its understanding, ability and overall approach to performing the requirements described in the Statement of Work, Activities & Tasks and Deliverables.

3. **Capability Statement:** A narrative – not to exceed two (2) pages – that explains the Offeror’s capability to perform the scope of work, activities & tasks and deliverables. The Offeror will demonstrate it has the capability and knowledge to successfully comply with the TOR requirements and to accomplish the expected results. A description of relevant trainings and qualifications, including CV, where applicable. CV is not included in the page length limit.

4. **Past Performance:** Not to exceed two (2) pages, the Offeror will submit a list of current and past similar work and assignments completed in the past five years that were similar in size, scope and complexity – preferably in areas listed in the SOW.
5. **References**: References from a minimum of two (2) clients worked with in the past two years on activities similar to this scope of work. Include the contact information: company or organization, name, phone number and email.

**PART B: Cost Proposal and Daily Rate**

The Offeror will propose a daily rate that it believes is realistic and reasonable for the work in accordance with the Offeror’s similar assignments in the past. The Offeror shall provide a complete budget based on cost elements described along with the template provided below.

The detailed cost proposal will include the following:

a. Proposed rate and number of days needed to accomplish the work;
b. Ground transportation and logistics costs for international travel; IIE will pay directly for airfare and lodging in Pakistan.
c. Related materials and supplies;

Provide in the Budget Narrative section, a concise description and justification for each line item cost. Be sure to include data and/or methodologies to support cost estimates.

<table>
<thead>
<tr>
<th>Services Required</th>
<th>Days</th>
<th>Daily Rate</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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<tr>
<td><strong>Total Consulting Fees</strong></td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Reimbursable Travel Expense Estimates</th>
<th>Unit Cost</th>
<th># of Units</th>
<th>Total</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ground Transportation</td>
<td></td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Pakistan Visa Fee</td>
<td></td>
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<tr>
<td>Other</td>
<td></td>
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<td></td>
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<tr>
<td><strong>Total Reimbursable Travel Expenses</strong></td>
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<td></td>
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<tr>
<td><strong>Grand Total for Cost Proposal</strong></td>
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</tbody>
</table>

The Budget Narrative shall be presented in such a way as to be easily referenced from the budget and should provide sufficient information so that IIE may review the proposed budget for reasonableness.

Offers including budget information determined to be unreasonable, incomplete and/or unnecessary for the completion of the proposed project or based on a methodology that is not adequately supported may be deemed unacceptable.

**Guidelines:**

1. Cost proposals shall be presented in U.S. dollars.
2. Offer must be inclusive of any applicable taxes such as VAT.
3. Travel and transportation – Provide the number of trips, origin and destination of trips, and other costs such as taxi fees (excluding those fees in travel within Pakistan). IIE will pay directly for airfare, lodging, and ground transportation in Pakistan.

4. Other direct costs – Itemize and provide complete details of other direct costs including unit prices that may be incurred.

**VII. Evaluation Criteria**

IIE will select the offeror whose proposal represents the best overall value to IIE in terms of the selection criteria specified below. Offerors who do not follow the instructions in this TOR may be disqualified from consideration.

Offers must first meet the mandatory requirements before their technical and cost proposals will be reviewed. Those offers not meeting the mandatory requirements will be automatically rejected.

The mandatory requirements are:

<table>
<thead>
<tr>
<th>MANDATORY REQUIREMENTS</th>
<th>MEETS REQUIREMENT</th>
</tr>
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<tbody>
<tr>
<td>Legal resident of home country and legally able to travel to Pakistan – Offeror shall provide a copy of the identification document with the technical proposal.</td>
<td>YES/NO</td>
</tr>
<tr>
<td>Pass IIE’s Responsibility Determination. IIE will check to make sure that final Offeror is not listed under terrorism list of U.S. Treasury Department, United Nations and that it is not listed as an excluded party under the System for Award Management <a href="http://www.sam.gov">www.sam.gov</a></td>
<td>YES/NO</td>
</tr>
<tr>
<td>The detailed cost proposal follows the prescribed format.</td>
<td>YES/NO</td>
</tr>
</tbody>
</table>

The technical evaluation will be based on the following weighted categories:

<table>
<thead>
<tr>
<th>Criteria Technical Proposal (Consultant Qualifications and Experience) 70%</th>
<th>Percentage 80% (maximum)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Experience and qualifications of the Offeror</td>
<td>30%</td>
</tr>
<tr>
<td>Technical approach</td>
<td>20%</td>
</tr>
<tr>
<td>Past performance</td>
<td>20%</td>
</tr>
<tr>
<td>References</td>
<td>10%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Cost Price Proposal Criteria 30%</th>
<th>Percentage 20% (maximum)</th>
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<tbody>
<tr>
<td>Cost data will be evaluated based on cost reasonableness, allowable and realism based on the following considerations:</td>
<td>30%</td>
</tr>
<tr>
<td>- Are proposed costs realistic for the work to be performed under the award?</td>
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<tr>
<td>- Do the costs reflect a clear understanding of the work requirements?</td>
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<tr>
<td>- Are the costs consistent with the various elements of the Offeror’s technical proposal?</td>
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</tbody>
</table>
VIII. General Terms and Conditions

1. The successful Offeror will be obligated to enter into an agreement containing the same or substantially similar terms and conditions found at: https://www.iie.org/Work-With-Us/Subawards-Procurements/Solicitations-for-Goods-and-Services. The terms and conditions may be changed, added to, deleted or modified by IIE prior to awarding the agreement.

2. Any proposal received in response to this solicitation will be reviewed strictly as submitted and in accordance with Section VII, Evaluation Criteria.

3. EXECUTIVE ORDER 13224 ON TERRORIST FINANCING

Offerors are informed that IIE complies with U.S. Sanctions and Embargo Laws and Regulations including Executive Order 13224 on Terrorist Financing, which effectively prohibit transactions with persons or entities that commit, threaten to commit or support terrorism. Any person that participates in this solicitation process, must certify as part of the offer that he or she is not on the U.S. Department of Treasury Office of Foreign Assets Control (OFAC) Specially Designated Nationals (SDN) List and is eligible to participate. IIE shall disqualify any offer received from a person that is found to be on the List or otherwise ineligible. Individuals that are included on the System for Award Management (www.sam.gov) shall not be eligible for financing and shall not be used to provide any commodities or services contemplated by this TOR.

4. TERMS AND CONDITIONS

Offerors are responsible for review of the terms and conditions described.

5. CONTRACT MECHANISM

IIE is anticipated to award a Consultant Agreement with set level of effort to the Offeror whose proposal will be evaluated based on the evaluation criteria described previously. Based on the merits of the offers received, IIE reserves the right to award more than one Consultant Agreement.

6. WITHDRAWALS OF PROPOSALS

Offerors may withdraw proposals by written notice via email received at any time before award.

7. RIGHT TO SELECT/REJECT

IIE reserves the right to select and negotiate with those offerors it determines, in its sole discretion, to be qualified for competitive proposals and to terminate negotiations without incurring any liability. IIE also reserves the right to reject any or all proposals received without explanation.

8. DISCLAIMER

This TOR represents only a definition of requirements. It is merely an invitation for submission of proposals and does not legally obligate IIE to accept any of the submitted proposals in whole or in part, nor is IIE obligated to select the lowest priced proposal. IIE reserves the right to negotiate with any or all offerors, but with respect to price, costs and/or scope of services. IIE has no contractual obligations with any offerors based upon issuance of this TOR. It is not an offer to contact. Only the execution of a written
Consultant Agreement shall obligate IIE in accordance with the terms and conditions contained in such agreement.

9. REQUEST FOR PROPOSAL FIRM GUARANTEE

All information submitted in connection with this TOR will be valid for 120 (one hundred twenty) days from the TOR due date. This includes, but is not limited to, cost, pricing, terms and conditions, service levels and all other information. If you are awarded the Consultant Agreement, all information in the TOR and negotiation process is contractually binding.

10. OFFER VERIFICATION

IIE may contact Offerors to confirm contact person, address, offer amount and that the offer was submitted for this solicitation.

11. FALSE STATEMENTS IN OFFER

Offerors must provide full, accurate and complete information as required by this solicitation and its attachments.

12. CONFLICT OF INTEREST

Offerors must provide disclosure of any past, present or future relationships with any parties associated with the issuance, review or management of this solicitation and anticipated award in or outside of the country of performance.

Failure to provide full and open disclosure may result in IIE having to reevaluate selection of a potential vendor.

13. ANNUAL RENEWAL

Based on the performance of the consultant and the needs of HESSA, the consultancy may be extended for a maximum of three years.

14. RESERVED RIGHTS

All TOR responses become the property of IIE, and IIE reserves the right in its sole discretion to:

- Disqualify any offer based on Offeror failure to follow solicitation instructions.
- Waive any deviations by offerors from the requirements of this solicitation that in IIE’s opinion are considered not to be material defects requiring rejection or disqualification, or where such a waiver will promote increased competition.
- Extend the time for submission of all TOR responses after notification to all offerors.
- Terminate or modify the TOR process at any time and reissue the TOR to whomever IIE deems appropriate.
- Issue an award based on the initial evaluation of Offerors without discussion.
• Award only part of the activities in the solicitation or issue multiple awards based on solicitation activities.

• Not compensate Offerors for preparation of their response to this TOR.

• Not guarantee that IIE will award an agreement based upon the issuing of this TOR.

• Award a consultant agreement to more than one Offeror for specific parts of the activities in the TOR.