



FEDERAL REPUBLIC OF NIGERIA

# REQUEST FOR PROPOSALS

for

## Individual Consulting Services

## Time-Based Payments

**ENGAGEMENT OF CONSULTANTS FOR THE TRAINING ON  
QUICKBOOKS FOR NACA PR/SR FINANCE OFFICERS.**

**December, 2022.**

## Letter of Invitation

Dear Sir:

1. The National Agency for the Control of AIDS (NACA) invites proposals for consulting services for the following assignment: **Engagement of Consultants to Train Finance Officers on QuickBooks**. The purpose of this assignment is as follows: The consultant will Conduct a training on QuickBooks Accounting Software-Basic, Intermediate and Master for the RSSH, PR/SR Finance Officers.

More details on the requested services are provided in the Terms of Reference in section A below.

The National Agency for the Control of AIDS (NACA) will make available the necessary documents and reports and other information concerning this assignment. You may obtain additional information at the following address: Procurement Unit at National Agency for the Control of AIDS (NACA) Ground Floor No. 3 Zingunchor Street, Beside AEDC Office, Wuse zone 4, Abuja.

A candidate will be selected on the basis of comparison of individual qualifications (Curriculum Vitae and Experience), Technical Approach, Methodology and Workplan

5. The following forms are attached:

- (a) Terms of Reference;
- (b) Model of Curriculum Vitae;
- (c) Model of Letter for submitting the Proposal;
- (d) Form for Observations of the Consultant on the Terms of Reference;

Yours sincerely,

**I.A Waziri**  
Head Procurement  
For Director General

## A. TERMS OF REFERENCE

### **Engagement of Consultants to Train Finance Officers on QuickBooks.**

**Location:** Nasarawa

**Task Title:** Consultancy to provide QuickBooks training to the NACA- RSSH

**Duty Station:** NACA- RSSH Head Quarters, Abuja

**Contract Modality:** Individual

**Duration:** 10 working days

### **BACKGROUND**

NACA is the Principal Recipient of the Global Fund grant for Resilient and Sustainable System for Health (RSSH). The Grant implementation period is April 1, 2021 to December 31, 2023.

The Grant includes implementation by the PR and four (4) Sub-Recipients (SRs) (all Government of Nigeria agencies/institutions) namely; NPHCDA, DHPRS, NPSCMP, and NCDC to drive the process. The grant is designed to support the four SRs to continue implementing the Nigeria Resilient and Sustainable Systems for Health (RSSH) grant to strengthen and expand the capacity of Nigeria's health system and drive improvements in primary Health care.

As part of the coordinating roles of the National Agency for the Control of AIDS(AIDS) as the Principal Recipient (PR), the Agency having identified the need to strengthen the reporting functions of the Sub Recipients s (SR) has concluded plans to train SR (and PR) finance officers on the QuickBooks Accounting Software.

### **SCOPE OF WORK:**

The National Agency for the Control of AIDS (NACA) has concluded plans to train the SRs under the RSSH/C19RM Grant in the use of QuickBooks accounting.

QuickBooks is one of the powerful accounting software that helps institutions to run their operations with ease and professionalism by enabling them to manage myriad accounting needs. With QuickBooks, organizations are able to get an overall understanding of their financial positions at any time and with the right skill set, staff within the finance department are able to effectively utilize the potential that such packages bring to the organization's development strives.

National Agency for the Control of AIDS (NACA) is therefore accepting Proposal from qualified and professional training institutions to offer and deliver the following:

- Train and provide technical guidance to RSH-PR/SR Finance Officers as a means to provide hands-on understanding and support to the new work environments.

## DELIVERABLES

No	Deliverables	Due Date
1	Conduct training on QuickBooks Accounting Software-Basic, Intermediate and Master for the RSSH, PR/SR Finance officers	10 (5days per stream) days. Training Report to be shared immediately after the training.

## OBJECTIVES

The objective of the National Agency for the Control of AIDS (NACA)- RSSH) has defined three strategies for training the NACA- RSSH PR/SR staff. The Objectives are:

- 1) Train the PR/SR staff on the use of QuickBooks software in the following areas but not limited to
  - a) How to Set Up Company Information
  - b) Transaction entry.
  - c) Validate postings into the Software
  - d) Budget tracking, monitoring and controls
  - e) Management of advances and retirement
  - f) Tracking, monitoring and clearing of bank failed transfers
  - g) Foreign exchange conversion and reporting of FX gains/losses
  - h) Monthly bank reconciliations
  - i) Familiarization with SR standard Chart of Accounts, cost centers and approved annual budgets
  - j) QuickBooks workflows and tags
  - k) Reports customization and memorization
  - l) Management of accounts receivables and payables, and vendors subsidiary ledgers
  - m) Tracking of purchase orders and other contractual commitments
  - n) Segregation of duties in QuickBooks
- 2) Establish a financial system that is specific and appropriate for Nigerian Centre for Disease Control (NACA- RSSH) to produce the followings:
  - a. Budget Implementation Report: Budget mapping including recording: Budget vs actual
  - b. Receipts and Payment Report
  - c. Fund balance accounting and change in net assets.
  - d. Running Assets management and procurement report
  - e. Cash Flow Statement
  - f. Balance Sheet
  - g. Other reports as may be required
- 3) To develop the Finance Department Staff skills in basic Management Information Systems (MIS):
  - a) Managing QuickBooks files
  - b) Backing up QuickBooks files
  - c) Restoring QuickBooks files
  - d) Customizing Reports to suit Management desires

## **METHODOLOGY**

The training will adopt a participatory approach which utilizes presentation, discussions, case studies, syndicate work, practical and brainstorming sessions.

Participants will be able to:

- 1) Interact and review QuickBooks Accounting data.
- 2) Complete and export periodic data
- 3) Review nominal ledger
- 4) Review audit trail.
- 5) Review transaction listing
- 6) Troubleshoot for errors, etc.
- 7) Create Chart of account or vendor account.
- 8) Transfer the financial data, paper-based or excel records into the QuickBooks system

## **TASK SUMMARY/DELIVERABLES**

- 1) Train the RSSH Sub Recipients (SRs) Finance staff to enable them use the QuickBooks software efficiently.
- 2) Provide guidance to the finance staff on financial data transfers to the QuickBooks format
- 3) Setup relevant accounting templates including Chart of Accounts in QuickBooks
- 4) Provide an electronic QuickBooks user manual.
- 5) Train PR/SR finance staff to be better equipped to take steps/ measures to correct identified problems.

## **Qualification and Experience**

The consultant must have over 5 years demonstrable experience in Accounting Software training with emphasis on QuickBooks.

A Master Degree in Information Technology, Accounting or Computer Science, Certification in financial Management information System will be an added advantage.

All qualifications in the CV must be evidence by attachment of certificates while experience must be evidenced by letters of engagement/completion certificates

## **PARTICIPANTS**

Total number of expected participants is 24

## **CERTIFICATION**

Certificates will be issued to participants at the end of the training by the consultant.

## **VENUE:**

The venue for the training will be proposed to hold out of State, Nasarawa State and will be provided by NACA

## **HOW TO APPLY?**

All qualified, experienced and interested consultants can kindly submit their Proposal along with a training proposal for staff as well as a record of previous training on or before 13<sup>th</sup> December, 2022. The technical and financial proposals should be submitted to National Agency for the Control of AIDS (NACA) Ground Floor No. 3 Ziguinchor Street, Beside AEDC Office, Wuse zone 4, Abuja.

### 3. Documents:

While submitting the Proposal, the Applicant shall, in particular, ensure to attach the following:

- Cover letter (max 1 page) explaining why they are the most suitable for the work.
- Copies of all certificates for all qualifications indicated in the CV.
- Relevant Experience (max 2 page) and relevant supporting document.
- Detailed methodology and conceptual framework with expected deliverables and timelines, man days required (3-5 pages).
- Recent CV
- A detailed training proposal
- Record of previous similar trainings carried out

The financial proposal shall specify a total lump sum amount (including a breakdown of costs for fee, travel and number of working days). Payments will be made in installments based upon key outputs/deliveries (mentioned under payment schedule above).

### 6. COLLECTION OF REQUESTS FOR PROPOSAL (RFP) DOCUMENT

The Request for Proposal (RFP) can be downloaded from this link;

### 7. GUIDELINE FOR SUBMISSION AND OPENING OF DOCUMENTS

The detailed Proposal must be in English Language and submitted in three (3) hard copies each (**one original & two copies**) of the requested documents and proposal. The documents shall then be enclosed and sealed in one (1) single outer envelope, and clearly marked at the topmost right corner "**Quickbook Training**" and the Name, Address, Email and Phone Number of the Consultant boldly written at the back of the envelope, with acknowledgement to NACA office at the address below.

Bids are to be dropped into the designated bid receipt box at the reception area after registering the bids with the receptionist at NACA reception area.

- a. **Deadline for Submission:** The deadline for the submission of proposal should not be later than Monday 12 noon of 9<sup>th</sup> January, 2022. The submission(s) received will be opened immediately after closing at NACA Conference Room in the presence of consultants that choose to attend.

### 8. ADDRESS FOR INFORMATION AND SUBMISSION OF PROPOSALS

**Attention:**

**Head Procurement**

National Agency for the Control of AIDS (NACA)

Ground Floor Reception

No. 3 Zingunchor Street, Beside AEDC Office, Wuse zone 4, Abuja

OR

Email: [procurement@naca.gov.ng](mailto:procurement@naca.gov.ng)

### 9. GLOBAL FUND CODE OF CONDUCT

You shall get acquainted with the global fund code of conduct for suppliers using this link below:

[https://www.theglobalfund.org/media/3275/corporate\\_codeofconductforsuppliers\\_policy\\_en.pdf](https://www.theglobalfund.org/media/3275/corporate_codeofconductforsuppliers_policy_en.pdf)

Accepting this invitation shall serve as an acknowledgement and agreement to abide by the Global Fund Code of Conduct for Suppliers.

#### **10. NOTES/DISCLAIMER**

- i. Late submissions will not be accepted.
- ii. NACA shall verify any or all documents and claims made by applicants and will disqualify consultants with falsified documents and claims.
- iii. If it is determined that submitted documents and claims have been falsified, the consultant may face prosecution in a court of Law.
- ii. NACA shall not be held responsible for any disqualified proposal as a result of any omission or deletion relating to the submission guidelines.
- iii. This advertisement shall not be construed a contract to any Consultant, nor shall it entitle any Consultant submitting documents to claim any indemnity from NACA.
- iv. NACA is not bound to shortlist any Consultant, and reserves the right to annul the bidding process at any time without incurring any liabilities or providing reason.

**Signed**  
Management.

## B. FORMAT OF CURRICULUM VITAE (CV)

Name : \_\_\_\_\_

Complete address :

Profession : \_\_\_\_

Date of Birth : \_\_\_\_\_

Years of professional experience : \_\_\_\_

Nationality : \_\_\_\_\_

Membership in Professional Societies : \_\_\_\_\_

Detailed Tasks Assigned : \_\_\_\_

### Key Qualifications :

*[Give an outline of your experience and training most pertinent to tasks on assignment. Describe degree of responsibility you held on relevant previous assignments and give dates and locations. One page should be sufficient.]*

### Education :

*[Summarize college/university and other specialized education, giving names of schools, dates attended, and degrees obtained. A page or less should be sufficient.]*

### Employment Record :

*[Starting with present position, list in reverse order every employment held. List all positions held since graduation, giving dates, names of employing organizations, titles of positions held, and locations of assignments. For experience in last ten years, also give types of activities performed and client references, where appropriate. Use about two pages.]*

### Languages :

*[For each language indicate proficiency: excellent, good, fair, or poor in speaking, reading, and writing.]*

### Certification :

I, the undersigned, certify that to the best of my knowledge and belief, these data correctly describe me, my qualifications, and my experience.

\_\_\_\_\_  
*[Signature of consultant ]*

Date : \_  
          Day/Month/Year

Full Name of Candidate :



**C. PROPOSAL**

[*Location, Date*]

To : [*Name and address of Procuring Entity*]

Mr/Mrs. :

I, the undersigned, offer to provide the consulting services for [*Title of consulting services*] in accordance with your Letter of Invitation dated [*Date*].

My fees are [net of taxes, estimated at..., as applicable]

I hereby submit my Proposal, which includes this Technical and Financial Proposal.

I understand that you are not bound to accept any Proposal you receive.

I remain,

Yours Truly,

Name of the Consultant :

Address :

**D. OBSERVATIONS AND SUGGESTIONS  
OF THE CANDIDATE CONSULTANT ON THE TERMS OF REFERENCE**

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- 1.
- 2.
- 3.
- 4.
- 5.

## **LIST OF ANNEXES**

Annex A :Cost Estimate of Services, and Schedule of Rates.

Annex B :Consultants Reporting Requirements.

Annex C :Evaluation Criteria.

ANNEX A

COST ESTIMATE OF SERVICES

(1) *Remuneration*

<i>Rate /day in (currency)</i>	<i>Number of Days</i>	<i>Total (currency)</i>
	10	

(2) Facilitation Fee	<i>Rate /day in (currency)</i>	5
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(3) *Reimbursables*

	<i>Rate</i>	<i>Units/Days</i>	<i>Total</i>
(a) (International) (Local) Travel + Taxi			

(b) Local  
Transportation

(c) Communications

(d) Hotel Accomodation

*Sub-total (2)*

TOTAL COST



**ANNEX B  
CONSULTANTS REPORTING REQUIREMENTS**

**Reports**

**Date**

1. Inception Report - 2days
2. Progress Reports   After first 5 days
3. Draft Final Report   on the 7<sup>th</sup> day
4. Final Report        After the pilot

**ANNEX C  
EVALUATION CRITERIA**

The Criteria, sub-criteria, and point system for the evaluation of the Technical Proposals are:

	<u>Points</u>
(i) Specific experience of the Consultant relevant to the assignment:	<b>60</b>
1) Adequacy for the assignment	60
(ii) Key professional qualifications and competence for the assignment:	40
1) General qualifications	40

**Total points for criterion (i & ii):       100**

**Note: -The Evaluation will be based on Quality Based Selection Method.**

-Payment will be made upon completion of work by the vendor and certification of job completion by the user department