



## Terms of Reference

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### **International consultant – Designer to lay out the ILO Financial Education training materials for MSMEs and informal business owners in the Philippines**

<b>Project Title</b>	Bringing Back Jobs Safely under the COVID-19 Crisis in the Philippines: Rebooting Small and Informal Businesses Safely and Digitally
<b>Organization</b>	International Labour Organization (ILO)

#### 1. Background

The COVID-19 crisis has brought an unparalleled impact on the people of the Philippines, particularly those in micro, small and medium-sized enterprises (MSMEs) considering they are the backbone of the economy and employment. The pandemic not only reduced existing jobs and income for them, but also prompted many to resort to alternative livelihoods, often as informal activities, to survive the prolonged community quarantine measures with various restrictions imposed on businesses. The challenge for the MSMEs continues even after a year since the initial lockdown in March 2020. As of late March 2021, Metro Manila and its neighbouring provinces entered into the Enhanced Community Quarantine (ECQ) in the face of the second wave of the epidemic surpassing the peak of the first wave of mid-2020. The vaccine programme has started to be rolled out, but it is expected to take at least until the end of the year for the vaccinated population to reach the level of herd immunity. Besides that, the new strains of virus are spreading, which further complicates the containment scenario. All these contribute to the continuing uncertainty for businesses, particularly for small and informal ones with limited resources to cope with the external shock.

While tremendous efforts have been made to address the extreme vulnerability of MSMEs and informal businesses under the pandemic, there are two areas which would merit further support in the world of work at this stage – first, the occupational safety and health (OSH) including the prevention and mitigation of the COVID-19 risks (COVID OSH) and; second, the digitalization of business operations for those currently left behind the big wave of digitalization of the economy prompted by the pandemic. The COVID-19 risks for MSMEs and the capacity gaps among them are deemed larger outside of Metro Manila, and more prominent among the smaller and informal ones.

With this understanding, the International Labour Organization (ILO) with the support of the Government of Japan will start the project – “Bringing Back Jobs Safely under the COVID-19



Crisis in the Philippines: Rebooting Small and Informal Businesses Safely and Digitally”. The project aims to contribute to improve the safety and health of workers in MSMEs in the non-metropolitan regions of the Philippines and mitigating the negative socioeconomic impact of the COVID-19 crisis. To achieve its goals, the project will work with the national network of training service providers to deliver the training on i) COVID OSH and ii) digitalization of business operations (e.g., digital entrepreneurship, e-commerce strategies and digital financial literacy). The ILO’s training programmes in respective areas will be translated into the specific local and sectoral context, and transmitted through training-of-trainers (ToT) seminars, mostly online. To win the mind of the numerous MSMEs not directly benefiting from the training, the successful experiences will be compiled into case studies and disseminated in ways attractive to MSMEs, especially for those outside the National Capital Region.

To bridge the digital divide outside Metro Manila, the project will also support the pilot implementation of the three Innovation Hubs. Through these Hubs and the affiliated satellites such as the local internet cafes, the project will provide the internet connectivity, co-working spaces, back-office services and linkage to programmes supporting MSMEs.

Under the digitalization training, the project is envisaged to tap the two ILO training programmes – the online version of the Start and Improve Your Business programme (“e-SIYB”) and the ILO Financial Education programme.

The ILO Global Programme on Financial Education builds capabilities of low-income people, entrepreneurs, youth, workers and others to make informed financial decisions about setting financial goals, budgeting, spending, saving, borrowing and engaging with financial service providers. The training-of-trainers (5 days) is usually delivered face-to-face however it can also be delivered online (using digital platforms like Zoom and complemented with other digital tools like Padlet and Jamboard) if needed. The delivery of the course (about 25 hours) to end-beneficiaries can also be done online if the situation does not allow for face-to-face trainings. The ILO also has an e-learning course on financial education (4 hours) that is available without charges on the ITC ILO e-campus.

## 2. The Assignment

To facilitate the work on Financial Education, the ILO Social Finance Programme has developed a generic financial education training curriculum that will be used to extend financial education to the context of MSMEs and informal business owners.



As such, In the framework of the Bringing Back Jobs Safely project, a designer is needed to lay out the ILO Financial Education training materials for MSMEs and informal business owners in the Philippines.

### 3. Scope of the Assignment, Activities, Level of Effort and timeline

#### 3.1. Scope of the assignment

Under the technical supervision of the Chief Technical Adviser of the project based in CO-Manila, and in coordination with a technical officer of the ILO Social Finance Programme based in Geneva and the Enterprise specialist based in CO-Manila, the consultant will lay out the ILO Financial Education training materials for MSMEs and informal business owners in the Philippines.

#### 3.2. Activities

The consultant will undertake the following tasks with technical support and review from a technical officer of the ILO Social Finance Programme:

- Lay out the ILO Financial Education trainer's manual for MSMEs and informal business owners in the Philippines in English (around 400 pages)
- Lay out the ILO Financial Education trainee's booklet for MSMEs and informal business owners in the Philippines in English (around 200 pages), with the inclusion of the illustrations and images newly designed for the booklet.
- Lay out the ILO Guidelines for Digital Adaptation in English (Around 150 pages), with the inclusion of relevant illustrations and images as provided by the ILO.
- Adapt any illustrations or imagery as required by the ILO project team and the ILO Social Finance Programme. This can include images of mock brochures to be adapted to the local context and target group, based on the recommendations and inputs from the ILO.

For these activities to be successfully delivered, the consultant will need to follow the recently developed ILO Financial Education training materials' template, including the new branding of the ILO Global Programme on Financial Education and the newly developed 2020 ILO Branding.

Apart from the above-mentioned illustrations required to be adapted by the designer, the ILO will provide the training materials' InDesign template, alongside all texts and illustrations to be needed in the layout.



## 5. Deliverables, budget and payment schedule

### 5.1. Deliverables

Once the core technical content of the newly adapted ILO Financial Education training materials is completed, the consultant will be required to work on and deliver the following outputs:

- **Output 1: December 3<sup>rd</sup> 2021.** The laid-out version of the ILO Financial Education trainer's manual for MSMEs and informal business owners in the Philippines in English (around 400 pages), following the template provided by the ILO.
- **Output 2: December 17<sup>th</sup> 2021.** The laid-out version of the ILO Financial Education trainee's booklet for MSMEs and informal business owners in the Philippines in English (around 200 pages), following the template provided by the ILO, and including all the illustrations produced by the illustrator and the ones directly adapted by the designer.
- **Output 3: January 10<sup>th</sup> 2022.** The laid-out version of the ILO Financial Education Guidelines for Digital Adaptation (around 150 pages), following the template provided by the ILO and including all relevant illustrations and images provided by the ILO.

These outputs will be required in a high-resolution PDF version and in a lower resolution web version. All the InDesign source files pertaining to the three above-mentioned outputs will be required for the validation of the assignment. All the outputs will need to respect the ILO Financial Education training materials' template as well as the 2020 ILO Branding.

This assignment will be carried out from November 22<sup>nd</sup> 2021 to January 10<sup>th</sup> 2022.

### 5.2. Payment schedule

In the letter signifying willingness and availability to take on the assignment, the consultant will also indicate the number of working days to be devoted to this work and the daily fee rate, which will be the basis of payment. The full payment will be made by electronic bank transfer in one tranche, upon presentation of invoice and acceptance of complete deliverables to the satisfaction of the ILO.

## 6. Qualification and experiences

The consultant must have the following experience and skills to be able to perform qualitatively the activities mentioned in these Terms of Reference:

- Demonstrated experience and expertise in producing high quality laid-out training materials



- Knowledge of the ILO Financial Education training materials

## 7. Management arrangements

The consultant will work under the overall authority and technical supervision of the Chief Technical Adviser of the project based in CO-Manila, and in coordination with a technical officer of the ILO Social Finance Programme based in Geneva and the Enterprise specialist based in CO-Manila.

## 8. Expression of Interest

The interested candidates must submit: i) letter of intent and ii) qualifications and relevant experience of the consultant/s (include detailed CV/s as annex).

The documents must be submitted to Ms Bea Arnela Parungo, *MSME Digitalization Coordinator*, for the project "*Bringing back jobs safely under the COVID-19 crisis in the Philippines: Rebooting small and informal businesses safely and digitally*" at [parungo@ilo.org](mailto:parungo@ilo.org), with copy to Mr Jayson Umaguinig at [umaguinig@ilo.org](mailto:umaguinig@ilo.org), *Programme and Administrative Assistant*, on or before 5:30 pm, Manila Time, **24 November 2021**.

Only shortlisted candidates will be contacted for interviews for the final selection