



Request for Application

Solicitation Title	Consultant for EpiC Thailand – Strengthening Financial Sustainability of Community-Based Organizations
Solicitation No.	EpiC-2026-003
Submit Questions and Proposal to	<u>procurement.epic.th@fhi360.org</u>
RFA Released Date	May 6, 2026
Questions due to FHI 360 by	May 11, 2026
FHI 360 responses to questions by	May 13, 2026
Application Deadline	May 15, 2026
Expected Award Date	May 18, 2026

Background

In this fiscal year, one commitment of EpiC Thailand is to strengthen the capacity of community-based organizations (CBOs) partners to deliver effective, sustainable, and accountable services. As part of this commitment, EpiC Thailand recognizes that robust financial management is a foundational pillar of organizational sustainability.

To advance this goal, EpiC Thailand is seeking qualified organizations or consultants to provide technical assistance and training services in financial planning and financial management, specifically designed for CBO partners. This initiative aims to equip CBO staff and leadership with practical financial skills to strengthen their organizational resilience and accountability.

Objectives

The primary objective is to enhance the financial planning and financial management capacity of selected CBOs through a tailored, practical, and results-oriented approach. In addition, EpiC aims to empower CBO Board Members and management officials by providing a platform for them to exchange challenges and explore potential solutions together. Specifically, the assignment will:

1. Strengthen CBOs' ability to analyze and understand their financial situation, improve financial planning, budgeting, and forecasting skills
2. Enhance financial management systems, internal controls, and reporting practices
3. Improve day-to-day financial management practices within CBOs



4. Build knowledge in basic managerial accounting to support operational decision-making
5. Enhance the overall financial accountability and sustainability of CBO partners
6. Support CBOs to prepare for transition from donor funding to domestic financing sources
7. Develop a comprehensive discussion platform to empower CBO Board Members and management officials to strengthen governance, support one another, and collaboratively address challenges and identify solutions.

Scope of Work

The Consultant/Service Provider will deliver a comprehensive, blended capacity-building program consisting of training, coaching, and tailored technical assistance. The selected Consultant/Service Provider will be expected to design and deliver capacity-building services covering the following core areas but not limited to:

- 1. Financial forecasting:**
budgeting, cash flow projection, and scenario planning for CBOs
- 2. Financial management:**
internal controls, fund management, financial reporting, and compliance
- 3. Managerial accounting:**
cost analysis, performance tracking, and decision-making tools for CBO managers
- 4. Financial literacy for CBOs:**
basic financial concepts, reading financial statements, and fiscal responsibility
- 5. Ethics and compliance**
Duty disaggregation, ethics, legal and compliance
- 6. Governance strengthening for board members and management officials**
Strategic implementation plan for CBO high level members

Key Activities

- 1. Needs Assessment and Customization**
 - Conduct a rapid assessment of participating CBOs' financial management capacity, systems, and gaps
 - Identify key challenges related to budgeting, cash flow, reporting, and sustainability
 - Design a tailor-made capacity-building plan responsive to different levels of CBO capacity
- 2. Development of Training Materials and Tools**
 - Develop practical, user-friendly training modules and tools, including:



- Financial planning and budgeting templates
- Cash flow management tools
- Simple financial dashboards for decision-making
- Ensure materials are adapted to low-resource and non-financial backgrounds

3. Delivery of Training (Onsite and Online)

- Facilitate interactive training sessions (in-person and virtual), covering:
 - Basic to intermediate financial management concepts
 - Budget development and monitoring
 - Financial analysis and interpretation
 - Costing and pricing of services
 - Financial sustainability and diversification of funding sources
- Use practical exercises based on real CBO data and scenarios

4. Onsite and Online Coaching and Mentorship

- Provide structured post-training coaching through:
 - Onsite visits for hands-on support
 - Regular virtual coaching sessions
- Support CBOs to:
 - Apply tools and concepts to their own financial data
 - Develop or refine financial plans and budgets
 - Identify financial risks and mitigation strategies
- Ensure continuous engagement to reinforce learning and behavior change

5. Tailored Technical Assistance

- Provide customized support to each CBO based on their specific needs, including:
 - Financial health check and analysis
 - Development of organization-specific financial plans
 - Strengthening internal financial procedures
 - Preparation for engagement with domestic financing mechanisms (e.g., NHSO reimbursement)

6. Monitoring, Learning, and Documentation

- Track progress of each CBO in improving financial management practices
- Document lessons learned, best practices, and success stories
- Provide recommendations for scaling and sustainability



7. Design and facilitate a comprehensive discussion platform that empowers CBO Board Members and management officials

- Design the structure and format of the discussion platform (e.g., workshops, peer-learning sessions, roundtables).
- Develop facilitation materials and guiding tools focused on governance, leadership, and organizational management.
- Convene and facilitate structured discussions among CBO Board Members and management officials.
- Capture key challenges, lessons learned, and best practices shared during sessions.
- Support participants in identifying actionable solutions and peer-supported strategies.
- Document outcomes and provide recommendations for strengthening governance and collaboration.

Eligibility criteria

Applicants must demonstrate:

- Proven experience in delivering financial capacity-building or training services, preferably to non-profit organizations or CBOs
- Qualified professionals with backgrounds in accounting, financial management, or organizational development
- Ability to contextualize financial content for community-level organizations with limited financial literacy
- Demonstrated ability to deliver practical, user-friendly training for non-financial audiences
- Ability to deliver training in Thai
- Strong facilitation, coaching, and mentoring skills

Expected Deliverables

- Inception report including methodology, workplan, and assessment framework
- CBO financial capacity assessment report
- Tailored training curriculum and financial management tools
- Training delivery report (including participant feedback and outcomes)



- Coaching and mentorship reports (onsite and online)
- Individual CBO financial improvement plans
- Final report including:
 - Progress and results
 - Challenges and mitigation measures
 - Recommendations for long-term sustainability

Duration

To be determined (e.g., 4–6 months), including training and follow-up coaching period

Budget

Evaluation Criteria:

Proposals will be evaluated based on the following criteria:

Criterion	Weight (%)
Proposed Approach	30%
Technical Expertise	20%
Operational Capacity	20%
Total Cost	30%

Required Documentation

Proposals must include at minimum the following components:

- Cover Letter (Not included in the 10-page limit)
- Organizational Background and Capacity
- Technical Approach
- Timeline
- Staffing Plan
- Budget

Please submit in PDF format not exceeding 10 pages. For further information about submission, please refer to section 11.



Timetable and Process for Submission

FHI 360 will accept questions from interested organization through the time and date noted on page 1. Questions will only be accepted in writing at the contact information noted on Page 1 with subject Questions for RFA (Financial Sustainability). FHI 360 will respond to all applicant questions in writing by the due date noted on Page 1 by emailing all members of a consortium.

- Applications must be received no later than the date noted on page 1. FHI 360 will confirm receipt of the proposal within two business days.
- A Selection Committee of FHI 360 employees will evaluate the proposals. It is anticipated that the successful applicant will be contacted within May 15, 2026
- Language: Applications should be submitted in English.

Formatting: Please use Times New Roman 12 font type, with single space and one-inch margins on all sides. Submissions—Please submit the application to procurement.epic.th@fhi360.org

Disclaimers and FHI 360 Protection Clauses:

- FHI 360 will not compensate offerors for preparation of their response to this solicitation.
- Issuing this solicitation is not a guarantee that FHI 360 will award a subcontract.
- FHI 360 reserves the right to issue a subcontract based on the initial evaluation of offers without discussion.
- FHI 360 may choose to award a subcontract for part of the activities in the solicitation. FHI 360 may choose to award subcontracts to more than one offeror for specific parts of the activities in the solicitation.
- FHI 360 may request from short-listed offerors a second or third round of either oral presentation or written response to a more specific and detailed scope of work that is based on a general scope of work in the original solicitation.
- FHI 360 has the right to rescind a solicitation or rescind an award prior to the signing of a subcontract due to any unforeseen changes in the direction of FHI 360's client, be it funding or programmatic.
- FHI 360 reserves the right to waive any deviations by offerors from the requirements of this solicitation that in FHI 360's opinion are considered not to be material defects requiring rejection or disqualification; or where such a waiver will promote increased competition.
- Data produced under this solicitation belongs to FHI 360. Any distribution of data must first have written authorization from FHI 360 or its designated representative.