
TERMS OF REFERENCE (ToR): PROCUREMENT OF A SERVICE PROVIDER: FINANCIAL MANAGEMENT TRAINING FOR CBOs

1.BACKGROUND

HIVSA's Community System Strengthening programme aims to enhance the financial management capacity of Community-Based Organisations (CBOs) in Northwest and Limpopo. To strengthen financial accountability and ensure compliance with National Lottery Commission (NLC) and other donor requirements, HIVSA seeks to appoint a service provider to develop and deliver a structured financial management training programme.

2. OBJECTIVE

The service provider will:

- Develop a practical financial management training programme
- Strengthen CBO capacity in financial management and bookkeeping
- Improve compliance in managing funds, record keeping, and submission of supporting documents (POP)

3. SCOPE OF WORK

3.1 Training Development

- Develop a user-friendly training manual (minimum 9 sessions) for CBOs
- Ensure the content is practical, user-friendly, and tailored to the capacity and operational environment of CBOs.
- Cover key areas:
 - ✓ Roles in financial control and accountability
 - ✓ Financial policies and procedures
 - ✓ Bookkeeping/Accounting systems such as SAGE/QuickBooks (cashbook, petty cash, record keeping)
 - ✓ Procedures for accounting
 - ✓ Accounting for transactions in the books
 - ✓ Budgeting and cash flow
 - ✓ Financial reporting, Filing and Auditing
 - ✓ Financial Legal Compliance
 - ✓ Purchasing, and stock control

Note: The service provider will develop their own content and not use existing HIVSA manuals. HIVSA will pick up from where the service provider leaves and continue with on-going mentoring of the CBOs.

3.2 Training Implementation

- North West: 9 CBOs (25 participants)
- Limpopo: 11 CBOs (26 participants)



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Training options:

- In-person: NW (3 groups), LP (2 groups)
- Virtual: 1 group per province

3.3 Reporting

- Provide progress updates
- Highlight challenges and recommendations
- Submit a final report

4. DELIVERABLES

- Inception report with timelines
- Financial Management Training Manual
- Training materials and tools/templates
- Conduct training sessions
- Final report (outcomes, feedback, recommendations)

5. QUALIFICATIONS / COMPETENCIES

The service provider must have:

- Experience in financial management training and material development
- Knowledge of NPO bookkeeping systems
- Understanding of HIV/AIDS and OVC programmes
- Experience working with CBOs in South Africa
- Accredited trainer with strong facilitation skills
- Finance or governance and compliance qualification.

6. DURATION

Short-term assignment
01–30 June 2026

7. APPLICATION PROCESS

Submit company profile and relevant experience to:
Fortune Phiri – phirif@hivsa.com
Deadline: 20 May 2026 at 12:00

Shortlisted applicants will be contacted for a briefing.

For enquiries:
(011) 494 1900

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