



TERMS OF REFERENCE FOR CONDUCTING A MASTERCLASS TRAINING ON THE ESG WASH CURRICULUM IN THE FINANCIAL SECTOR

I. Introduction

About the Uganda Bankers Association

The Uganda Bankers' Association (UBA) is an umbrella organisation for financial institutions licensed and supervised by the Bank of Uganda (BoU). Established in 1981, UBA is currently made up of 34 members, including 23 Tier 1 Commercial Banks, 3 Development Banks, and 8 Tier 2 & 3 Financial Institutions. (Total has remained 34, but constitution of membership has changed between Tier 1 vs Tier II & III UBA promotes and represents the interests of the member financial institutions; works closely with the regulator to promote financial sector growth; undertakes policy research on the banking sector; and acts as a platform for advocacy for a strong, vibrant, and respected financial services industry.

About Water For People Uganda

Water For People is an international development organization that exists to promote the development of high-quality drinking water and sanitation services, accessible to all, and sustained by strong communities, businesses, and governments. It envisages a World where every person has access to reliable and safe water and sanitation services.

About the Ministry of Water and Environment

The Ministry of Water and Environment (MWE) is the Government of Uganda agency responsible for sound management and sustainable utilization of water and environment resources for betterment of population of Uganda. The Ministry of Water and Environment established the Water Resources Institute as a center of excellence that provides cutting edge applied research and training for professional skills development across all levels on water resources management.

II. Background to the Assignment



Recently, the Uganda Bankers Association signed an MOU with Water For People aimed at enhancing the position of WASH financing interventions in the banking sector. To this end, several activities were proposed, including them was the development of the ESG WASH-related curriculum and building the capacity of the sector in ESG WASH-related interventions.

We propose that enhancing awareness of the sector from the apex would be critical to achieve our mutual goal of enhancing and positioning the WASH financing interventions within the sector in a sustainable manner. To do this, a masterclass on the ESG WASH curriculum for the senior executives, technical staff and other pertinent stakeholders in the banking sector is pivotal.

It is against this backdrop that UBA therefore seeks a qualified and experienced consultant/s to undertake a 3 days training of the financial sector on the ESG WASH curriculum.

2.1. Objectives of the Assignment

The main objective of the assignment is to enhance financial institutions' understanding of ESG-WASH principles by building their capacity.

2.2. Specific Tasks of the Assignment

The consultant/s shall support the execution and delivery of the following tasks:

- Design and deliver an Executive ESG-WASH curriculum Masterclass targeting banking sector senior executives, technical staff, and other banking sector practitioners.
- Develop and deliver training materials and toolkits to support the training.
- Prepare and submit a comprehensive training and implementation report summarizing outcomes and recommendations.

III. Scope of the Assignment

The scope shall focus on supporting the execution and delivery of the specific tasks presented in Section 2.2 above. The project targets a total number of 50 participants, mainly staff from UBA member financial institutions and other Banking sector

practitioners. In view of the defined deliverables, the Consultant/s will be required to perform tasks throughout various stages of this project in liaison with the reporting officer. Additionally, the training will target banking sector executives and technical staff with a focus on strategic ESG and WASH within the sector.

IV. Expected Deliverables

- Inception Report outlining methodology and implementation plan.
- Training Curriculum and Materials aligned with ESG Wash-related activities.
- Delivery of the Masterclass for banking sector executives and technical staff, including ESG Champions and Credit and Business Development leads.
- Final assignment report on the capacity building.

V. Timeframe

The assignment is expected to be conducted on average over a period of 30 days, including the development of the training tools and delivery of the Master class training.

VI. Technical Requirements of the Consultant (s)

- The consultant/s should demonstrate strong expertise & exposure to the industry ESG framework, and Water, Sanitation and Hygiene (WASH) related interventions with proven experience delivering related trainings.
- The consultancy firm should have a strong reputation in working with and training financial institutions.
- Should have worked on similar capacity-building engagements with financial institutions in areas of ESG and WASH in the past for reputable institutions.
- The Team Leader and other experts should have qualifications in ESG, sustainable finance or related fields and have proven experience in capacity building in ESG and WASH.
- Key experts should have relevant postgraduate qualifications in finance, sustainability, ESG, or related fields, at least 5 years of relevant professional experience and demonstrated experience delivering similar training.
- Proven experience in conducting related capacity building engagement with financial institutions - Testimonials from other similar projects.

VII. Application process



Interested consultants and firms can apply for the assignment by submitting an expression of interest to take up the assignment, with the following documents:

- **Technical proposal:** The technical proposal should include the relevant experience, technical approach and methodology, proposed training implementation plan, team composition and CVs of key experts, evidence of executing similar work previously.
- **Financial proposal:** The financial proposal should include a detailed budget in UGX, including Professional fees.
- Both the technical and financial proposals should not exceed 20 pages in length.
- **Interested applicants** should submit their application and supporting documents to secretariat@ugandabankers.org with the subject line "**UBA Capacity Building in the ESG WASH Curriculum**" no later than **1st July 2026**. Only short-listed candidates will be contacted.

VIII. Evaluation Criteria of Assignment

| Criterion | Scores % |
|---|------------|
| Relevant experience in ESG and sustainability reporting | 30 |
| Technical approach and methodology | 30 |
| Qualifications and experience of key experts | 20 |
| Financial proposal and value for money | 20 |
| Total | 100 |

IX. Contract Management

The contract shall be managed through the following processes:

- The consultant/s will report to the Senior Research Officer of the Uganda Bankers Association.
- The consultant/s will be responsible for designing training materials, delivering training sessions, and preparing reports.
- Payments will be made based on agreed milestones and deliverables under the consultancy contract.