

PUNJAB SKILLS DEVELOPMENT FUND

INVITATION FOR EXPRESSION OF INTEREST (EOI)

**HIRING OF FIRM FOR PROVISION OF KNOWLEDGE- BASED
PROJECT MANAGEMENT SERVICES**

January, 2019



Submission Date for EOI: February 08, 2018 before 3:00 PM

21-A, H-Block, Dr. Mateen Fatima Road, Gulberg-II, Lahore Pakistan

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1) Background

Punjab Skills Development Fund (PSDF) is a not-for-profit, section 42 Company set up under the Companies Ordinance 1984 by the Government of the Punjab. Proposals will be invited from established Firms for Provisioning of Knowledge- Based Project Management Services to PSDF. All interested and eligible firms are requested to go through the EOI document in detail and provide relevant information and supporting documents mentioned in the document.

2) Invitation to Expression of Interest

PSDF is soliciting Expression of Interest from consulting firm for Provisioning of Knowledge- Based Project Management Services. In this regard, the consulting firm will be required to provide technical, project management and editorial services to support and manage activities under the 5-year Technical Assistance (TA) grant provided to PSDF by Department for International Development (DFID), UK. The firm will be hired on a retainership basis.

3) Conditions for Eligibility (Qualification Criteria)

The Consulting firm MUST have prior experience and expertise in conducting and managing research and knowledge-based projects. The Consulting firm submitting proposals should have the following eligibility for qualifications:

- i. Should be a legal entity i.e. Firm / Company (copy of incorporation / registration certificate)
- ii. Provide National Tax Number (NTN) and General Sales Tax (GST)/ Provincial Sales Tax (PST) (if applicable) in the name of organization and provide a copy of registration
- iii. Must be an Active Tax payer as per "Active Tax Payer List" of FBR.
- iv. Affidavit on stamp paper declaring that company is not blacklisted by any Government agency/ semi-government / authority / organization. (Original required)

4) Required Expertise

The consulting firm MUST have a robust mix of the following expertise to determine suitability of the firm.

- a) Experience in research, knowledge and content-based work
- b) Experience in conducting base/ field research, writing TORs, research reports, demonstrating editorial and writing expertise
- c) Experience of writing publishable reports and related documents.
- d) Consultant management, working with government, semi-government, not-for-profit organizations and / or donors carrying out assignments.
- e) Concurrent management of multiple projects.

5) Technical Team: Required Qualifications & Experience

The technical team proposed by Consulting Firm must consist of one Project Manager, one Team Lead, one Research Analyst and one Subject Matter Expert as per the requirement of each research project (List of planned projects are mentioned in scope of work section). CVs to be attached as per **annexure C-3**. The brief requirement of the incumbents is provided below:

a) Technical Team

Project Manager:

Minimum master's degree or equivalent with 8 years of experience.

Team Leader:

Minimum Bachelor's degree or equivalent with 5 years of experience.

Research Analyst:

Minimum Bachelor's degree or equivalent with 5 years of experience.;

Subject Matter Expert:

Minimum Bachelor's degree or equivalent with 5 years of experience.;

b) Indicative role description of each position:

Project Manager: Relationship management and overall project management with PSDF and quality assurance of all deliverables of each project.

Team Lead: Lead and manage the entire value chain of each assigned research project. Point of contact with PSDF and 3rd party firm for the entire duration of the project. Please note that one team lead may only manage a maximum of two concurrent projects.

Research Analyst: Research and content-based work support to each project assigned.

Subject Matter Expert: Provide and lead the technical expertise of subject matter associated with each research topics.

6) Pre-Qualification Document

The interested firm can obtain EOI document containing all details, shortlisting criteria and terms & conditions from PSDF website (<http://psdf.org.pk/downloads/#procurement>) and PPRA website (www.ppra.punjab.gov.pk).

7) Acceptance or Rejection of EOI

The competent authority/committee may reject all EOI at any time prior to the Request for Proposal (RFP). The procuring agency shall upon request communicate to any interested consulting firm, the grounds for its rejection of expression of interest, but shall not be required to justify those grounds.

8) Time schedule for Submission of Expression of Interest (EOI)

Complete EOI containing all required information & documentary evidences (one original & one copy) must be delivered to **Procurement Department**, PSDF, 21-A, H-Block, Dr. Mateen Fatima Road, Gulberg-II, Lahore, in a sealed packet and submitted before **03:00 PM February 08, 2019**. EOI will be publicly opened on the same day i.e. **February 08, 2019 at 3:30 PM** in the presence of consultant firm representatives who wish to attend the EOI opening.

Note: Kindly fill the following **necessary annexures** required for the qualification criteria and attach the supporting documentary evidences as mentioned in each annexure.

- Annex – A: Firm Information
- Annex – B: Eligibility Response Checklist
- Annex – C: Technical Evaluation Criteria
- Annex – C-1: Assignment Summary
- Annex – C-2: Technical Team Composition
- Annex – C-3: CV Format: proposed technical team members
- Annex – D: Cover Letter for the Submission of Expression of Interest

9) Instruction & Guidelines for Consulting Firms

- a) The purpose of this document is to provide orientation to enable Consulting firms to evaluate their interest and response in conducting this assignment and is not a guarantee of the actual conditions under which the services will be tendered or executed. Furthermore, it contains forms and list of required documents to be submitted.
- b) PSDF wishes to shortlist interested Consultancy Service providers who will be invited to submit proposals for Provision of Knowledge- Based Project Management Services
- c) Only short-listed firm(s) will be invited to submit Technical and Financial Proposals through RFP.
- d) All documents and information received by PSDF from applicants will be treated as strictly confidential.
- e) Documents submitted to PSDF will not be returned.
- f) All expenses related to participation in this Expression of Interest shall be borne by the firm(s).
- g) The envelope containing hard copy of EOI shall be received in PSDF office at Lahore.
- h) EOI received after closing-time shall not be accepted and will be returned without opening.
- i) PSDF reserves the right to request submission of additional information from applicants to clarify/further understand, if required.
- j) PSDF reserves the right to verify any information provided by prospective bidders. **False information will lead to disqualification and the organization will be barred for bidding in PSDF schemes/projects.**
- k) PSDF will evaluate the EOI of eligible organizations based on their capacity, previous similar experience, qualification and competence of key professional staff of core team.
- l) PSDF will notify to the short-listed Consulting firms (**found eligible and scoring more than or equal to 65 marks in their evaluation**) and request for proposal (RFP) documents will be made available only to the short-listed entities.
- m) Any clarification requests may be made in writing or through e-mail to the following contact.

Procurement Department

Punjab Skills Development Fund
21-A, H-Block, Dr. Mateen Fatima Road,
Gulberg-II Lahore –Pakistan
E-mail: Procurement@psdf.org.pk
Tel: 042-35752408-10
Fax: 042-35752190

Scope of Work

The firm hired will focus primarily on the research and evidence generation objective of the Technical Assistance (TA) component. The TA component is the 5-year Technical Assistance grant provided to PSDF by Department for International Development (DFID), UK.

The following services will be provided by the firm on both on-going and planned research project and topics pre-determined by PSDF: The following is an indicative list of research projects. The final scope of work will be shared at the RFP stage.

- 1) Conduct initial background research and develop concept papers for presentation to the Technical Assistance Committee (TAC).
- 2) Assist in preparing TAC working papers to be approved by PSDF senior management.
- 3) Identify and bring on board subject matter experts for each study.
- 4) Develop the Terms of Reference and procurement documents in conjunction with PSDF Research & Planning and Procurement teams.
- 5) Identify and mobilise a pool of local and international firms that can participate in each study.
- 6) Provide support in consultant selection to PSDF teams.
- 7) Project manage each consultant's work in terms of timelines and deliverables for the entire engagement.
- 8) Provide quality assurance on all deliverables.
- 9) Prepare publishable reports from each study.
- 10) Develop and fine-tune policy recommendations from each study.
- 11) Prepare case studies and documentation of key PSDF successes, work themes and projects as and when required by PSDF.
- 12) Provide project management services on other (non-research) TA projects as and when required.
- 13) To ensure that each research project is completed in an approximate of 6 months duration.

The list of on-going and planned research projects is provided below but not limited to: -

On-going Projects

- 1) Rapid Assessment of Punjab's Technical and Vocational Education and Training (TVET) Programme
- 2) Mid-programme tracer for World Bank-funded skills programme being executed by PSDF

Planned Projects

- 1) Revamping of PSDF's listing of trades
- 2) Measuring impact of PSDF intervention (funding) on the skills training market
- 3) Skills needs assessment of socially marginalised segments in Punjab
- 4) Identification of employment opportunities and barriers faced by Punjab's low-income women in accessing formal employment in large urban centres
- 5) Mapping of the eastern-belt and agri-heartland clusters of PSDF to identify formal and self-employment opportunities in skilled workforce (phase 1)
- 6) Management of shortlisted pool of curricular experts
- 7) Revamping PSDF's trade taxonomy to run Procurement & Monitoring value chains on the new, uniform taxonomy

11) Deliverables

- 1) Concept paper finalized & approved by PSDF
- 2) Terms of Reference defined and accepted by TAC
- 3) Necessary approvals obtained from Procurement: required information and proposal format finalized
- 4) EOI stage completed
- 5) Inception report submitted & accepted
- 6) Sampling methodology to be finalised
- 7) RFP stage completed
- 8) Contract awarded after consultant selection (start of assignment)
- 9) Inception report submitted & accepted
- 10) Survey activity completed (if applicable)
- 11) Analysis and insights finalized
- 12) Narrative of report including analysis & policy recommendations submitted
- 13) Acceptance of final report and close of assignment upon satisfaction
- 14) Report converted into publishable format & text
- 15) Report designed along with quality review of report
- 16) Report published/disseminated as per Terms of Reference

12) Duration

Duration of contract is one-year and extendable (on retainership basis), starting from the signing of the contract with PSDF.

13) Evaluation/Selection Criteria

The evaluation/selection criteria for consulting firms is given in Annexure B and C.

14) Declaration

Kindly provide the declaration as per format provided below.

I, _____ hereby declare that:

- all the information provided in the Expression of Interest (EOI) is correct in all manners and respects
- and I am duly authorised by the **Governing body/Board/Management** to submit this EOI on behalf of "[Click here and type the name of organization]"

Name	
Designation	
Signature	
Date and Place	

Note: Please attach documentary proof for authorization by the governing body/board/management.

Annex – A “Firm Information”

Firm Profile			
Sr. No.	Required Information	Response	
1	Legal name of the Firm		
2	Year of Registration / Establishment of the Firm		
3	National Tax Number		
4	Core business area/s of the Firm		
5	What is the legal status of your organisation? Tick the relevant box (one box only). (Attach Copy/Copies of Registration Certificate/s)	Public Sector Organisation	
		Section 42 Company	
		Public Ltd. Company	
		Private Ltd. Company	
		Partnership Firm	
		Others (Please specify)	
6	Name and designation of 'Head of Firm'		
7	Mobile:		
	Phone/s:		
	Email:		
	Fax:		
	Postal address of firm:		
	Website address:		
8	Name and designation of 'Contact Person':		
	Phone/s:		
	Mobile:		
	Email:		
	Fax:		

Annex – B “Eligibility Response Checklist”

Sr. No.	Necessary Eligibility Information	Response/Proof	
1	Should be a legal entity i.e. Firm / Company (copy of incorporation / registration certificate)		Copies of required documents are attached
			Copies not attached
2	Provide National Tax Number (NTN) and General Sales Tax (GST)/ Provincial Sales Tax (PST) (if applicable) in the name of organization and provide a copy of registration		Copies of required documents are attached
			Copies Not Attached
3	Must be an Active Tax payer as per “Active Tax Payer List” of FBR.		Copies of required documents are attached
			Copies Not Attached
4	Affidavit on stamp paper declaring that company is not blacklisted by any Government agency/ semi-government / authority / organization. (Original required)		Original affidavit is attached
			Not Attached

Annex – C “Technical Evaluation Criteria”

The firm who have not submitted the information required as in **annexure B**, shall be excluded and remaining complying firms would be evaluated according to following criteria.

Technical Proposal Evaluation Criteria																					
Criteria for Technical Proposal Evaluation	Marks																				
Experience of firm	40																				
<p>f) Experience in research, knowledge and content-based work. (3 Marks)</p> <p>g) Experience in conducting base/ field research, writing TORs, research reports, demonstrating editorial and writing expertise (3 Marks)</p> <p>h) Experience of writing publishable reports and related documents. (3 Marks)</p> <p>i) Consultant management, working with government, semi-government, not-for-profit organizations and / or donors carrying out assignments. (2 Marks)</p> <p>j) Concurrent management of multiple projects. (2.33 Marks)</p> <p>Note: 1. Provide information on 3 assignments / projects in the last 5 years as per the format provided in Annexure C-1 (Assignment Summary) covering the elements required above. (Submit supporting documents to substantiate your work). 2. ONLY submit 3 most similar assignments. Any additional assignment shall not be reviewed and marked. 3. Provide any additional details/example of the work done on the above criteria within the last 5 years.</p> <p>Marks allocation: 13.33 marks per assignment. 13.33 Marks: Assignment covering all of the above elements (a – e, marks mentioned in each point)</p>	13.33 X 3																				
Team structure and profile	40																				
<p>Relevant educational qualifications / certifications and professional experience of the individuals team members allocated to the research projects. Also state how each team member associated will add value to the project.</p> <p>(Firm must also provide detailed CVs and profiles of all members of the core team. Also make sure to submit the consent of the subject matter expert to work on the allocated project)</p> <p><u>Please indicate the individuals for the following roles: Mandatory</u></p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="text-align: left;"><u>Position (marks)</u></th> <th style="text-align: left;"><u>Education</u></th> <th style="text-align: left;"><u>Overall Experience</u></th> <th style="text-align: left;"><u>Marks</u></th> </tr> </thead> <tbody> <tr> <td>Project Manager (10):</td> <td>Master’s degree or equivalent</td> <td>8 years</td> <td>10</td> </tr> <tr> <td>Team Lead (10):</td> <td>Bachelor’s degree or equivalent</td> <td>5 years</td> <td>10</td> </tr> <tr> <td>Research Analyst (10):</td> <td>Bachelor’s degree or equivalent</td> <td>5 years</td> <td>10</td> </tr> <tr> <td>Subject Matter Expert (10):</td> <td>Master’s degree or equivalent</td> <td>5 years</td> <td>10</td> </tr> </tbody> </table>	<u>Position (marks)</u>	<u>Education</u>	<u>Overall Experience</u>	<u>Marks</u>	Project Manager (10):	Master’s degree or equivalent	8 years	10	Team Lead (10):	Bachelor’s degree or equivalent	5 years	10	Research Analyst (10):	Bachelor’s degree or equivalent	5 years	10	Subject Matter Expert (10):	Master’s degree or equivalent	5 years	10	10 X 4
<u>Position (marks)</u>	<u>Education</u>	<u>Overall Experience</u>	<u>Marks</u>																		
Project Manager (10):	Master’s degree or equivalent	8 years	10																		
Team Lead (10):	Bachelor’s degree or equivalent	5 years	10																		
Research Analyst (10):	Bachelor’s degree or equivalent	5 years	10																		
Subject Matter Expert (10):	Master’s degree or equivalent	5 years	10																		



Skills For Succ

Company Financials (audited financial statement of the last year issued by an ICAP-licensed Chartered Accountant to be submitted or Tax return 2017-18 to prove the turnover/revenue)		20
<u>Turnover / Revenues</u>	<u>Marks allocated</u>	
Less than Rs 5M	0 (Zero)	
Rs. 5M but less than Rs. 7M	10	20
Rs. 7M but less than Rs.10M	15	
Rs. 10M and above	20	
Grand total		100
<i>The minimum qualifying technical score is 65%.</i>		

Annex – C-1 “Assignment Summary”

Assignment name:	Cost of the project:
Country:	Duration of assignment (months):
Location within country:	
Name of client:	Total number of staff/months (by your firm) on the assignment:
Start date of assignment (month/year):	1- Total value of the service agreement
Completion date (month/year):	2- Value of consultancy services provided by your firm under the agreement
Name of associated consultants, if any:	Number of professional staff-months provided by associated consultants:
Name of senior professional staff of your firm involved and functions performed (indicate most significant profiles such as Project Director/Coordinator, Team Leader):	
Narrative description of project:	
Description of actual services provided by your staff within the assignment: 1. 2. 3.	
1. Firm's Name:	
2. Name and contact no. of the reference for the assignments	

Annex – C-2 “Technical Team”

Sr. No.	Name of Management Staff	Designation	Qualification	Area of Expertise	Number of Years in Firm	Total Experience
1						
2						
3						
4						
5						

You may add more information, if applicable.

Annex – C-3 “CV of Proposed Technical Team”

1. **Proposed Position** [*only one candidate shall be nominated for each position*]: _____

2. **Name of Firm** [*Insert name of firm proposing the staff*]: _____

3. **Name of Staff** [*Insert full name*]: _____

4. **Date of Birth**: _____ **Nationality**: _____

5. **CNIC No** (if Pakistani): _____ **or Passport No**: _____

6. **Education**:

<i>Degree</i>	<i>Major/Minor</i>	<i>Institution</i>	<i>Date (MM/YYYY)</i>

7. **Membership of Professional Associations**: _____

8. **Other Training** [*Indicate significant training since degrees under 6 - Education were obtained*]:

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

10. **Employment Record** [*Starting with present position, list in reverse order every employment held by staff member since graduation, giving for each employment (see format here below): dates of employment, name of employing organization, positions held.*]:

<i>Employer</i>	<i>Position</i>	<i>From (MM/YYYY)</i>	<i>To (MM/YYYY)</i>

11. Detailed Tasks Assigned

[*List all tasks to be performed under this assignment*]

12. Work Undertaken that Best Illustrates Capability to Handle the Tasks Assigned

[Among the assignments in which the staff has been involved, indicate the following information for those assignments that best illustrate staff capability to handle the tasks listed under point 11.]

1) **Name of assignment or project & Location:** _____ **Cost of Project** _____

Date of Start _____ Date of Completion _____

Actual Time Spent on the Project: _____ in months.

Client: _____

Main project features: _____

Positions held: _____

Activities performed: _____

2) **Name of assignment or project & Location:** _____ **Cost of project** _____

Date of Start _____ Date of Completion _____

Actual Time Spent on the Project: _____ in months.

Client: _____

Main project features: _____

Positions held: _____

Activities performed: _____

*Please must attach certificate/evidence to prove experience and working on project.

13. Certification:

I, the undersigned, certify that to the best of my knowledge and belief, this CV correctly describes myself, my qualifications, and my experience. I understand that any wilful misstatement described herein may lead to my disqualification or dismissal, if engaged.

[Signature of staff member] Date: _____
Day/Month/Year

Annex – D Cover Letter for the Submission of Expression of Interest (EOI)

[Firm letterhead]

[Date]

To

Chief Executive Officer

[Address mentioned in Data Sheet]

Re: Expression of Interest (EOI) in respect of [Insert title of assignment]

Dear Sir,

We offer to express our interest to conduct consultancy Services for [Insert title of assignment] in accordance with your EOI dated [Insert Date of Tender advertised].

We hereby declare that all the information and statements made in this expression are true and accept that any misinterpretation contained therein may lead to our disqualification. Our expression is binding upon us and subject to the modifications resulting from contract negotiations. We undertake that we will initiate the services as per the client's request if our proposal is accepted. We understand that you are not bound to accept any or all proposals you receive.

Thank you.

Yours sincerely,

Signature

Name and title of signatory: