

# PUNJAB SKILLS DEVELOPMENT FUND

## TENDER DOCUMENT

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HIRING OF FIRM FOR  
TECHNICAL ADVISORY SERVICES FOR TRACER STUDY  
2018

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**July, 2018**



**Submission Date for Tender Document: August 8, 2018 before 3:00 PM**

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<b>Table of Contents</b>		<b>Page</b>
<b>1-</b>	<b>Invitation to Bids</b>	<b>2</b>
<b>2-</b>	<b>Instruction to Bidders</b>	<b>2</b>
<b>3-</b>	<b>Conditions for Eligibility</b>	<b>3</b>
<b>4-</b>	<b>Terms of Reference / Scope of Work</b>	<b>3</b>
<b>5-</b>	<b>Condition for Contract/General guidelines</b>	<b>4</b>
<b>6-</b>	<b>Form of Contract</b>	<b>5</b>
<b>7-</b>	<b>Form of Bid</b>	<b>5</b>
<b>8-</b>	<b>Delivery Timelines or Completion Date</b>	<b>5</b>
<b>9-</b>	<b>Technical Proposal Evaluation Criteria</b>	<b>5</b>
<b>10-</b>	<b>Financial Evaluation Criteria</b>	<b>6</b>
<b>11-</b>	<b>Submission of Bids (Technical and Financial Proposal):</b>	<b>6</b>
a.	Bid Security	6
b.	Cover Letter for the Submission of Technical Proposal	6
	Annexure - A	7
	Annexure - B	8
	Annexure - C	10
	Annexure - D	9
	Annexure - E	11
	Annexure - F	13
	Annexure - G	14
	Annexure - H	14

## **Bidding Document: Sections (1 – 11)**

### **1- Invitation to Bids**

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 in partnership with Department for International Development (DFID) UK. Punjab Skills Development Fund is governed by an independent Board of Directors.

PSDF is planning to undertake a comprehensive tracer study to ascertain the employment status of trainees who have completed skills training under the Punjab Economic Opportunities Programme (PEOP) and the Skills Development Programme (SDP). Both programmes were/are funded by the Government of Punjab and UK's Department for International Development (DFID), and executed by PSDF.

Proposals will be invited from established Firms (hereafter called as bidders) for hiring of firm for Technical Advisory Services for Tracer Study 2018 to PSDF. All interested and eligible bidders are requested to go through the Tender document and provide relevant information and supporting documents mentioned in the Tender document.

### **2- Instruction to Bidders**

The selection of hiring the firm for Technical Advisory Services for Tracer Study 2018 will be based on **Quality & Cost through Single Stage, Two Envelopes** bidding procedure.

- a) The proposal shall be a single package consisting of two separate envelopes, containing separately Technical Proposal and Financial Proposals. The envelopes shall be marked separately as "Technical Proposal" and "Financial Proposal".
- b) The bidders shall submit completed standard documentation appended as Annexures to this document along with specific documents required by PSDF.
- c) In the first instance, the "Technical Proposal" shall be opened. The envelope marked as "Financial Proposal" shall be retained unopened in the custody of PSDF. PSDF shall evaluate Technical Proposal in a manner prescribed in **section 9** of the bidding document.
- d) PSDF reserves the right to reject any proposal, which does not conform to specified requirements without reference to price and condition. During the technical evaluation no amendments in Technical Proposal shall be permitted.
- e) After the evaluation and approval of technical proposals, PSDF shall open financial proposals of the technically accepted bids, publicly at a time, date and venue announced and communicated to the bidders in advance, within the bid validity period.
- f) The financial bids of the organisations found technically non-responsive shall be returned unopened to the respective bidders. The technical and financial proposal will be evaluated based on PSDF evaluation criteria as provided in **section - 9 and 10** of this document.
- g) This document has different annexures carrying information on eligibility, technical evaluation and terms of references, conditions of tender, type of contract etc. to assist potential contractors to develop their technical proposals. Bidders that are evaluated as eligible and qualify in technical evaluation will be short-listed for financial bid opening.
- h) Contract shall be awarded on quality and cost-based method with combined evaluation of the Technical and Financial Proposals.
- i) *The weightage of quality shall be **80% and 20 % weightage shall be given to cost. A minimum score of **65 marks***** is required in technical evaluation to qualify for Financial Bid opening.

### 3- Conditions for Eligibility

The successful bidder, fulfilling the following criteria, will be considered as an eligible bidder/firm for the evaluation process;

- a) Minimum 8 years of experience in delivering technical advisory to or conducting non-academic research projects. (attach proof)
- b) Legal Status of Firm (Registered with the Security Exchange Commission of Pakistan or Registrar of Firms (evidence of incorporation/registration is required).
- c) Affidavit on firm's letterhead declaring that company has not been blacklisted by any government agency/authority/autonomous body/MNCs (Affidavit on original letterhead)
- d) The firm must have registered with Federal Board of Revenue (FBR) for Income Tax with active status on Active Taxpayer List (ATL) and with Punjab Revenue Authority (PRA) for Punjab Sales Tax (PST) (registration certificates are required).

Any, failure to provide information as per the above mentioned or fulfilment under the requirement of "Eligibility Criteria Checklist" (**Annexure B**) shall deemed to be or declared to be ineligible for the bidding process and technical evaluation shall not be carried out.

### 4- Terms of Reference / Scope of Work

- **Objective**

To provide technical advice and expertise on the design and execution of the tracer study from PSDF's standpoint, so that a comprehensive deliverable is produced by the third-party conducting the tracer study, within the specified timeframe.

- **Project Background**

PSDF is planning to undertake a comprehensive tracer study to ascertain the employment status of trainees who have completed skills training under the Punjab Economic Opportunities Programme (PEOP) and the Skills Development Programme (SDP). Both programmes were/are funded by the Government of Punjab and UK's Department for International Development (DFID), and executed by PSDF. This Tender Document pertains to the technical services required to manage and supervise this tracer study (not conducting the study itself).

- **Scope of work**

The firm will be responsible for the following milestones & deliverables:

- a) Strengthening the Terms of Reference for the tracer study as per the requirements of the SDP log frame & DFID;
- b) Providing technical expertise to the sample design process considering all facets of the SDP and PEOP;
- c) Supporting PSDF in the identification and mobilization of a pool of firms that can be likely contenders for the tracer study;
- d) Supporting PSDF in the selection of the most appropriate third-party research/consulting firm to conduct this assignment
- e) Providing technical expertise to the questionnaire/data collection design process;
- f) Technical supervision of the engagement with the third-party conducting the tracer (coordination assistance will be provided by the PSDF project team);

- g) Quality assurance of all periodic and final deliverables of the engagement, including the final report to ensure it meets the standards set by DFID & PSDF.

- **Concept note on planned tracer study**

The broad areas to be covered by the tracer study are as follows:

- a) PSDF is looking to hire a survey firm/company for conducting the survey and compiling a study to assess the transition of PSDF's graduates from skills training to the labour market. The objective of this assignment is to collect data to get a sense of the mid-programme impact of the SDP, as well as tracing PEOP graduates, with respect to employment and income generation results, and to gather feedback from employers.
- b) More than 100,000 individuals have completed training under SDP during from inception of the programme in 2016. The survey conducted in support of the tracer study is expected to provide representative findings of all graduates, all schemes launched under the programme, and all districts of Punjab since August 2016. 147,709 people across Punjab were trained (37.7% women) under the PEOP which ran from 2011 to 2016. All relevant parameters like urban/rural split, gender, age, and prior income, are expected to be considered at the sample design phase.
- c) The lists of graduates, training providers and verified employers will be provided to the consulting firm.
- d) The study will cover key questions around improved employment/income earning outcomes for the poor and vulnerable that PSDF targets with its trainings. The questionnaire and/or other data collection tools will be prepared in sight of all relevant indicators in the SDP log frame document.
- e) The firm will undertake lead responsibility for completing the following tasks & obtaining PSDF approval at each stage:
  - i. survey/sampling methodology and workplan;
  - ii. preparation of inception report;
  - iii. pilot-testing and finalisation of questionnaires and other data collection tools;
  - iv. development of data entry methodology designed and pre-tested by an expert before field work is initiated;
  - v. hiring and training of survey teams;
  - vi. implementation & monitoring of the field survey to ensure high quality data;
  - vii. entry, cleaning and documentation of the data;
  - viii. final tracer report covering graduates, employers and training providers.
- f) The contract will be spread over a period of 5 months. Planning & implementation of the surveys will be carried out in consultation with PSDF project team.

#### 5- Condition for Contract/General guidelines

- a) PSDF reserves the right to award or not to award this contract and Bidders who fail to complete and attach all the relevant documents shall be disqualified. No tender document shall be accepted, if not **properly sealed, marked, signed and stamped**.
- b) PSDF shall enter into a formal contract with the successful Bidder only and reserves the right to terminate the contract, if performance of Bidder is unsatisfactory.
- c) PSDF reserves the right to verify any information provided by the applicants or may visit business premises to verify the information shared in tender documents.
- d) PSDF reserves the rights to request submission of additional information from applicant firm to clarify or further understand aspects of technical proposal, if required.
- e) Bidder presenting incorrect information intentionally or fraudulently will be disqualified.

- f) Bidders to ensure that their bid documents are submitted before the closing time and date of the tender. **Bids received after closing time and date will NOT be considered.**
- g) All documents and information received by PSDF from applicants will be treated as confidential. Documents submitted to PSDF will not be returned.
- h) All expenses related to participation in this bidding document shall be borne by the bidder.
- i) Documents shall be submitted in hard copies in a sealed envelope marked as "PROPOSAL" as hard copy in a sealed envelope for "hiring the firm for Technical Advisory Services for Tracer Study 2018" The envelope containing hard copies of technical proposal and financial proposal shall be received on the postal address as follows: -  
**Procurement Department**  
**Punjab Skills Development Fund, 21-A, H-Block, Dr. Mateen Fatima Road, Gulberg-II, Lahore.**  
**E-mail: [Procurement@psdf.org.pk](mailto:Procurement@psdf.org.pk) Phone: +92-42-35752408-10, Fax: +92-42-35752190.**
- j) The firm must submit the Technical Proposal, and Financial Proposal in separate sealed envelopes in a sealed package. If Financial Proposal is found open or unsealed, then the proposal may be rejected.

*\*\*\*Although adequate thought and effort has been given in the drafting of this document, errors such as typos may occur which the PSDF will not be responsible.*

#### 6- Form of Contract

- a) The successful bidder shall sign and execute the standard contract of PSDF including any general conditions on the terms and conditions specified therein. Any amendment to the standard contract shall be made with mutual consent of both parties.
- b) The duration of the contract will be five months, in case PSDF decides to cancel the contract during the contract period, a notice period of one month will apply.
- c) Successful company will sign a contract and will provide the agreed services within the stipulated agreed time of issuance of the Service Order.
- d) In case of any dispute regarding services the decision of PSDF shall be final & binding.
- e) The PSDF may reject all bids or proposals at any time prior to the acceptance of a bid or proposal. PSDF shall upon request communicate to any firm, the grounds for its rejection of all bids or proposals but shall not be required to justify those grounds.
- f) All taxes will be deducted in accordance with applicable laws.
- g) The bid shall remain valid for the period of **120 days** from the date of proposal opening.

#### 7- Form of Bid

Please submit the financials in **Annexure- G**

#### 8- Delivery Timelines or Completion Date

Tentatively six months, including pre-engagement preparation time, actual project engagement, and post-engagement for finalisation. Services shall start after signing of the contract.

#### 9- Technical Proposal Evaluation Criteria

- This document is governed by the procedure approved by PSDF management.
- The technical proposal of eligible organisations will be evaluated against requirements specified in "**Annexure – C**".

#### **10- Financial Evaluation Criteria**

The Financial Proposals of only eligible bidders with technically qualified specifications will be opened in the presence of all the conformed bidders. All bids shall be opened publicly in the presence of bidders or their representatives who may choose to be present, at the time and place announced prior to the bidding and person designated for PSDF shall read aloud the unit price as well as the bid amount. All bidders shall sign an attendance sheet at the time of bid opening. Please provide information regarding Financials in “**Annexure – G**”.

#### **11- Submission of Bids (Technical and Financial Proposal)**

Complete bid containing Technical and Financial proposal along with Bid Security and all required information and documentary evidences must be submitted before closing date i.e. **Wednesday 8<sup>th</sup> August 2018 at 3:00 PM**. Technical proposals will be opened publicly on the same day i.e. **Wednesday 8<sup>th</sup> August 2018 at 3:30 PM** in the presence of bidder’s representatives who wish to attend it. Bid Security of disqualified bidders will be returned after awarding the business to successful bidder.

##### **a. Bid Security**

Bid Security of Rs. 5,000 (five Thousand) in the form of pay order or demand draft favouring Punjab Skills Development Fund shall be submitted along with the Technical Proposal. The Bid Security should be valid for a period not less than 6 months and must be enclosed in financial bid.

##### **b. Cover Letter for the Submission of Technical Proposal**

A cover letter as specified in “**Annexure F**” shall be submitted with the proposal

**Note: Please provide the required information in all annexures mentioned in this document and mark them while submitting the bid. All annexures attached herewith are to be considered a part of this bidding document.**

Annexure - A

Organizational Information			
Sr. No.	Required Information	Response	
1	Legal name of the organization		
2	Year of Registration / Establishment of the Organisation		
3	National Tax Number		
4	General / Punjab Sales Tax Number		
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	
		Private Partnership Firm	
	Others (Please specify)		
6	Name and designation of 'Head of Organization'		
7	Mobile:		
	Phone/s:		
	Email:		
	Fax:		
	Address of organization:		
	Website address:		
8	Name and designation of 'Contact Person':		
	Phone/s:		
	Mobile:		
	Email:		
	Fax:		

Annexure - B

Eligibility Criteria Checklist				
Sr. No.	Eligibility Criteria Details	Evidence/Proof Required	Attached Supporting Documents/Proof and mark Yes/No	
			Yes	No
1	Minimum 8 years of experience in delivering technical advisory to or conducting non-academic research projects.	Evidence of proof to be attached	<input type="checkbox"/>	<input type="checkbox"/>
2	Legal Status of Firm (Registered with the Security Exchange Commission of Pakistan or Registrar of Firms.	Evidence of incorporation/registration	<input type="checkbox"/>	<input type="checkbox"/>
3	Affidavit on firm's letterhead declaring that company has not been blacklisted by any government agency/authority/autonomous body/MNCs.	Affidavit on original letterhead	<input type="checkbox"/>	<input type="checkbox"/>
4	The firm must have registered with Federal Board of Revenue (FBR) for Income Tax with active status on Active Taxpayer List (ATL) and with Punjab Revenue Authority (PRA) for Punjab Sales Tax (PST)	Registration certificates	<input type="checkbox"/>	<input type="checkbox"/>

**Annexure - D**

<b>Technical Proposal Evaluation Criteria</b>		
<b>Criteria for Technical Proposal evaluation</b>	<b>Points</b>	<b>Weightage</b>
<b>Experience of Firm</b>		
<ul style="list-style-type: none"> <li>research, knowledge and content-based work;</li> <li>research work pertaining to economic development;</li> <li>directly conducting or supervising household and/or community surveys; experience of developing ToR for research-based consulting assignments.</li> </ul> <p><b>Note: Information on at least two past assignments/projects conducted within the last eight years must be shared (as per the format provided in Annexure D).</b></p>	30	
<b>Team structure and profile</b>		
<p>Relevant qualifications and experience of the full-time staff member assigned to lead this project. The technical expert to be committed for this engagement should be a full-time employee of the bidding firm, with the following experience and competencies:</p> <ul style="list-style-type: none"> <li>Development economist (interest in human resource/workforce development desirable);</li> <li>Technical command over econometric methods, macro- and microeconomics;</li> <li>Experience of directly conducting or supervising household and/or community surveys;</li> <li>History of working with the federal or provincial governments desirable.</li> </ul> <p><b>Note: Please provide detailed profile/CV of team lead associated with the project, as per Annexure E.</b></p>	40	
<b>Approach, methodology and work plan</b>		
<ul style="list-style-type: none"> <li>Understanding of the client's needs;</li> <li>Proposed methodology &amp; work plan for ensuring technical quality of said study;</li> <li>Methodology for quality assurance of delivery of 3<sup>rd</sup> party deliverables;</li> <li>Risk mitigation to ensure 3<sup>rd</sup> party deliverable meet timelines;</li> <li>Any other operational, technical or organizational strength not solicited elsewhere that you consider relevant to this project.</li> </ul> <p><b>Note: as per Annexure F.</b></p>	30	
<b>Grand total</b>	<b>100</b>	
1. The minimum qualifying technical score is 65%.		

**Annexure - D**

**Relevant Experience of the firm**

In order to determine suitability of the firm for this project, PSDF requires information regarding the firm's past experience that will be most relevant, with reference from current or past assignments conducted by the bidder. Information on **at least two past assignments/projects conducted within the last eight years must be shared (as per the format below)**. Using the format given below, provide information on each assignment for which your organisation was legally contracted, or as one of the major companies within a consortium, for carrying out services similar to those requested under this Assignment. Description about the past assignments must not exceed **2 pages per assignment**. Please also provide Client's certification and/or evidence of the contract agreement of the past assignment.

Assignment name:	
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. Firm's Name: .....	
2. Certificate by the Client / Employer that the work was successfully completed by the consultant.	

**Annexure - E**
**Curriculum Vitae (CV) for Proposed Professional Staff**

Information regarding the project lead who will be responsible for the implementation this assignment.

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/Experience**: [*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: \_\_\_\_\_

### 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 or authorized representative of the staff] Date: \_\_\_\_\_  
Day/Month/Year

Full name of authorized representative: \_\_\_\_\_

**Annexure - F****Approach, methodology and work plan**

In this section, please provide the following information (note exceeding 5 pages):

- Your understanding of the client's needs for this assignment;
- Proposed methodology & work plan for ensuring technical quality of said study;
- Methodology for quality assurance of delivery of 3rd party deliverables;
- Risk mitigation to ensure 3rd party deliverable meet timelines;
- Any other operational, technical or organizational strength not solicited elsewhere that you consider relevant to this project.

**Annexure - G****Financial Proposal****Form of Bid/ Financial Proposal**

<b>Sr. No.</b>	<b>Description</b>	<b>Unit Price Inclusive of All Applicable Taxes PKR</b>
1	Cost of advisory services	

**Payment Terms:**

Upon completion of assignment payment shall be made within 30 days after the submission of invoice.

**Annexure - H****Technical Proposal Submission Letter**

*Location:* \_\_\_\_\_ *Date* \_\_\_\_\_

To:

-----  
-----  
-----

Dear (name),

We, the undersigned, offer to provide support in technical advisory for PSDF's planned tracer study in accordance with your Bidding Document [**date here**] and our Proposal. We are hereby submitting our Proposal, which includes this Technical Proposal, and a Financial Proposal sealed under a separate envelope.

We hereby declare that all the information and statements made in this Proposal are true and accept that any misinterpretation contained in it may lead to our disqualification.

We undertake, if our Proposal is accepted, to initiate the services related to the assignment not later than the date indicated in signed agreement.

We understand you are not bound to accept any Proposal you receive.

Yours sincerely,

Authorized Signature [*In full and initials*]: \_\_\_\_\_

Name and Title of Signatory: \_\_\_\_\_

Name of Firm: \_\_\_\_\_

Address: \_\_\_\_\_  
\_\_\_\_\_