

# PUNJAB SKILLS DEVELOPMENT FUND

## Tender Document

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### “Provision of Record Management Services”

March , 2017



**Submission Date for Sealed Bids: 29th March, 2017 (10:00 AM)**

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

Phone: +92-42-35752408-10

Fax: +92-42-35752190

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## **1- Background**

Punjab Skills Development Fund (PSDF) is a section 42, not-for-profit 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.

## **2- Invitation to bids**

Punjab Skills Development Fund (PSDF), a not for profit company invites sealed bids / proposals for the provision of Record Management Services for PSDF official files from tax registered and experienced record management service providers.

## **3- Instruction to bidders**

The selection of firm will base on Quality Cost Based Selection method. PSDF will adopt single stage two envelopes bidding procedure.

The bid shall be a single package consisting of two separate envelopes, containing separately the financial and the technical proposals. The envelopes shall be marked as “Financial Proposal” and “Technical Proposal”. In the first instance, the “Technical Proposal” shall be opened and the envelope marked as “Financial Proposal” shall be retained unopened in the custody of the PSDF. The PSDF shall evaluate the technical proposal in the manner prescribed in the section - 7 given in the document, without reference to the price and shall reject any proposal which does not conform to the specified requirements. During the technical evaluation no amendments in the technical proposal shall be permitted. After the evaluation and approval of the technical proposals, the PSDF shall open the financial proposals of the technically accepted bids, publically at a time, date and venue announced and communicated to the bidders in advance, within the bid validity period. The financial bids found technically nonresponsive shall be returned un-opened to the respective bidders. The technical and financial proposal will be evaluated on the basis of PSDF evaluation criteria as provided in section “Technical Proposal” and “Financial Proposal” of the document.

The scope of activities set the basis of technical approach to be adopted by the potential bidders. The bidders who will get at least 65 % marks in technical evaluation will be called for financial bid opening.

## **4- Conditions for eligibility**

The successful bidders, fulfilling the following criteria, will be considered as eligible bidders for the bidding process.

- i. The firm must have local presence and registered office in Lahore.
- ii. The firm must be regular tax-payer having NTN, GST and PNTN.
- iii. The firm must at least five (5) years of experience in Record Management Services.

- iv. Must not be blacklisted by any government or bi-lateral/multi-lateral financial institution.

Kindly fill the following necessary annexures required for the above qualification criteria and attach the supporting documentary evidences as mentioned in each annexure;

- Annex – A: Organization Information  
Annex – B: Eligibility Response Checklist  
Annex – C: Relevant Experience of the Organisation  
Annex – D: Key Management Staff of Firm  
Annex – F: Staff Experience

And also sign the declaration form at the end of document and attach with your other documents. For further information and any query please contact the person below:

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

## **5- Scope of job**

The complete scope of job is provided as annexure – G. The bidding organisations are requested to go through the document and understand scope of job completely. The PSDF wishes to appoint a reputable service provider for Records Management Services in order to have a smart solution with traceability, & accessibility

Records management system should have following key areas;

- Secure Document Storage
- Retrieval Services
- Scanning / Digitization
- Online Access – Web Portal
- Secure Destruction
- Records Management Consultancy
- Departmental Reports
- Cost Center Analysis
- Return Reports
- Destruction Reports

### **Solution Outline:**

- Full User & System Audit

- Box, File, Document and Barcode Indexing
- Index Verification
- Logging
- Preparation of Boxes
- Delivery/Collection of Boxes/Files
- Data Entry
- Boxes/Files Data Capture
- Boxes/Files Storage
- Boxes/Files Scanning
- Boxes/File Destruction
- Departmental Reports
- Cost Center Analysis
- Return Reports
- Destruction Reports

## **6- Terms of References**

- a) Successful bidder will work with close coordination of PSDF admin team. All the services will be checked and verified by PSDF admin team.
- b) The data file stored at premises of qualified bidder will remain the property of PSDF
- c) The bidder shall, at his own expense, obtain for himself, on his own responsibility, all information that may be necessary for preparing the tender and entering into contract, and shall determine and satisfy himself by such means as he may consider necessary or desirable as to all matters pertaining to the tender.
- d) The bidder shall also satisfy himself before submitting his tender as to the nature of grounds.
- e) PSDF shall not assume any responsibility regarding information gathered interpretation or deduction, which the bidder may arrive at, from the date that may be furnished with the contract documents.
- f) The firm will not be reimbursed for any costs of any kind, whatsoever, incurred in connection with the preparation and submission of his tender.
- g) Failure to comply with any terms and conditions in the tender document and contract given out to the successful bidder could incur imposition of penalties as spelled out lately in the contract.
- h) All payments will be done as per PSDF rules within a week, after verification of satisfactory services.

- i) Mention timelines to complete work of Indexing and Transportation. Also mention working days and off days.

## 7- Guidelines

- a) PSDF will not be responsible for any costs or expenses incurred by bidders in connection with the preparation or delivery of bids. The bidders are recommended to visit PSDF office to have a look at Files prior to bid.. It is compulsory to see all the files available in PSDF office. PSDF will not be responsible if the bid rejected owing to not going through the files.
- b) Only short-listed applicants fulfilling the eligibility criteria will be considered for technical evaluation. From which the financial proposal of technically qualified bidder, will be opened for financial evaluation.
- c) All documents and information received by PSDF from applicants will be treated in strictest confidence. Documents submitted to PSDF will not be returned.
- d) All expenses related to participation in this tender document shall be borne by the applicants.
- e) The closing date and time for receipt of technical proposal is **29th March, 2017 (10:00 AM)** and will be publically opened on same day i.e. 29th March, 2017 (10:30 AM) in the conference room PSDF Lahore Office, in the presence of the interested bidders or their representatives who may wish to attend.
- f) Proposals received thereafter will not be accepted.
- g) PSDF reserves the right to request submission of additional information from applicants in order to clarify/further understand aspects of technical proposal, if required.
- h) PSDF reserves the right to verify any information provided by the applicants.
- i) Questions about this technical proposal can be made only in writing: a letter or an e-mail and must be asked by or before COB **22<sup>nd</sup> March, 2017**. For any other related information please contact the undersigned.

### Postal Address

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

## **8- Technical Proposal evaluation criteria**

This tender document is governed by the procedure approved by PSDF management. The technical proposal of eligible organisations will be evaluated using the scoring guide attached as annexure – E.

## **9- Financial Proposal**

Financial proposal will be prepared as per format provided in Annex – H. The quoted price shall be:

- a) Best / final / fixed and valid until completion of the Contract i.e. not subject to variation /escalation;
- b) In Pak Rupees;
- c) Inclusive of all taxes, duties, levies, insurance, freight, etc. Mention all applicable taxes separately as well.
- d) If not specifically mentioned in the Tender(s), it shall be presumed that the quoted price is as per the above requirements.

## **10- Financial Evaluation**

The financial proposals of only those technically responsive bidders who will obtain minimum sixty five percent marks will be opened. A combined evaluation of the technical and financial proposals will be carried out by weighting and adding the quality and the cost scores. The weight for quality is eighty percent with twenty percent given to cost and the firm obtaining the highest combined score will be invited for negotiations. Cumulative cost of all three floors required in financial proposal will be taken for evaluation.

## **11- Type of Contract**

The type of contract will be rate contract for number of files to be stored and associated with penalties on time and quality of services.

## **12- Performance Guarantee**

A performance guarantee i.e. 10% of contract value in the form of valid bank guarantee will be submitted by successful bidder at the time of signing of contract.

### 13- Declaration

Kindly provide the declaration as per format provided below at the end of proposal.

I, \_\_\_\_\_ hereby declare that:

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

Name	
Designation	
Signature	
Date and Place	

### 14- Submission of Bids (Technical and Financial Proposal)

Complete bid containing technical and financial proposal along with CDR (5% of contract value); all required information and documentary evidences may be submitted before 10:00 AM on 29th March, 2017. Technical proposals will be publically opened on the same day i.e. 29th March, 2017 at 10:30 AM in the presence of bidder's representatives who wish to attend it.

#### a- Cover Letter for the Submission of Technical Proposal and Financial Proposal

[Firm letterhead]

[Date]

To

Chief Executive Officer

[Address mentioned in Data Sheet]

**Re:** Technical Proposal and Financial Proposal in respect of [Insert title of assignment]

Dear Sir,

We offer to provide the Services for [Insert title of assignment] in accordance with your Tender for Proposal dated [Insert Date of Tender advertised]. We hereby submit our technical Proposal and financial proposals including the required documents in a sealed envelope.

We hereby declare that all the information and statements made in these proposals are true and accept that any misinterpretation contained therein may lead to our disqualification. Our proposal 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:

**Important Note:** The competent authority 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 bidder, the grounds for its rejection of all bids or proposals, but shall not be required to justify those grounds.

**Annexures**

**Annex – A “Organization Information”**

<b>Form A: Firm Profile</b>			
<b>S #</b>	<b>Required Information</b>	<b>Response</b>	
1	Legal name of the organization		
2	Year of Registration / Establishment of the Organisation		
3	National Tax Number		
	General Sales Tax Number		
	PRA Sales Tax Number		
4	Core business area/s of the organization		
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	
		Sole Proprietor	
	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:		

**Annex – B “Eligibility Response Checklist”**

Sr. No.	Necessary Eligibility Information	Response/Elaboration	
1	The firm must have local presence. Has your firm a registered office in Lahore?	Yes	
		No, (then justify how will you manage the project)	
2	Attach copies of last tax return		Copies Attached
			Copies Not Attached
3	Mention National Tax Number (NTN) or General Sales Tax (GST) and Punjab Revenue Authority (PRA) registration in the name of Organization and provide a copy of registration	National Tax Number (NTN)	
		General Sales Tax (GST)	
		PRA Registration	
4	Has your firm five (5) years of experience in Record Management System		Yes (attach copies of work orders or contract)
			No
5	Has your firm ever blacklisted by any government authority or any bi-lateral/multi-lateral financial institution? (MUST attach an undertaking by your firm’s authorised person with this document)		We solemnly declare that our organization or any member of consortium has never been suspended/debarred or blacklisted.
			Our organization has been blacklisted once or more than once.

Undertaking: Information provided above is correct and I am willing to offer my services for the assignment mentioned above.

Name of person with signatures \_\_\_\_\_



**Annex - D “Key Management Staff Information”**

<b>Form ‘C’: Key Management Staff Information (Sheet 1<sup>1</sup>)</b>					
<b>Sr. #</b>	<b>Required Information</b>		<b>Response</b>		
1	Name				
2	Position				
3	Firm Name				
4	Age				
5	Years of association with the firm				
6	Core professional area of work				
7	Assigned tasks in this firm				
8	Please name one Record Management project undertaken by the individual				
9	Specify the scope & size of the project (total budget, quantum of work etc.)				
10	Specific role of the individual in this project				
11	<b>Please provide information on additional experience in Record Management projects</b>				
	<b>Position</b>		<b>Employer</b>	<b>Duration</b>	
				<b>From</b>	<b>To</b>
12	<b>Educational Qualifications</b>				
	<b>Degree/Diploma/Certificate</b>		<b>Year</b>	<b>Institution</b>	<b>Speciality</b>

<sup>1</sup>Please mark the other two sheets as Sheet 2 and Sheet 3 respectively for each individual.

**Annex – E “Technical Evaluation Criteria”**

<b>Sr. No.</b>	<b>Description</b>	<b>Total Points</b>	<b>Category Points</b>	<b>Remarks</b>
<b>1</b>	<b>Relevant Experience of Firm</b>	<b>15</b>		Copies of or contracts are required
	Experience of Record Management if more than 10 years		10	
	Experience of Record Management If equal to or more than 7 years but less than 10 years		7	
	Experience of Record Management more than 5 years		5	
<b>2</b>	<b>Experience with Govt, Semi Government, International or Autonomous bodies</b>			Copies of contracts are required
	If greater than 3 years		5	
	If less than 3 years but greater than 1 year		3	
<b>3</b>	<b>Current Contracts</b>	<b>10</b>		
	Currently working with at least 5 clients for Record Management		5	Copies of or contracts are required
	If currently working with more than 5 clients for Record Management		10	
<b>4</b>	<b>Financial Capability</b>	<b>15</b>	-	<b>15</b>
	Annual Turnover of firm should be greater than 100 millions		15	Copy of last financial audit report done by ICAP/SBP registered auditing firm or tax return is required.
	If less than 100 million but greater than 70 million		10	
	If less than 70 million but greater than 50 million		7	
	If less than 50 million but greater than 30 million		5	
	If less than 30 million		0	
<b>5</b>	<b>Company</b>	<b>10</b>		Share Copy of registration or letter of incorporation
	Offices of company in more than 3 cities including Lahore, Karachi, Islamabad		10	
	in Lahore, Karachi, Islamabad		5	
	In two cities including Lahore		3	
	Only in Lahore		1	
	Professional qualification or certification		03	
<b>5</b>	<b>Clients With Company</b>	<b>15</b>		

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	Number of total clients if 10 and above		10	Company profile showing the total clients. Or detail of clients on company letter head with sign and stamp by authorities. Company profile showing the total Govt clients. Or detail of clients on company letter head with sign and stamp by authorities.
	If 7 and above		7	
	If 5 and above		5	
	If less than 5		0	
	<b>Number of Govt, Semi Govt, International or Autonomous clients, If 5 and above</b>		5	
	3 and above		3	
	Less than 3		0	
	<b>Quality</b>	<b>20</b>		Attach copy of certificate
	Record Management related ISO certification, if one		10	
	If more than one		15	
	<b>Response Time</b>			
	Urgent response time if equal to or less than 4 hours		5	
	If greater than 4 hours		0	
	<b>Working Staff</b>	<b>15</b>		Company Profile showing the number of working staff on company letter head with sign and stamp by authorities.
	Total number of working staff held with the company in total 20 or above		15	
	10 and above		10	
	7 and above		7	
	5 and above		5	
	Less than 5		0	
	<b>Total Points Awarded</b>	<b>100</b>		
Attachment of relevant evidences in each case is mandatory. In case of non-compliance no mark will be awarded.				

**Annex – F “Staff Experience”**

<b>S #</b>	<b>Name of Staff</b>	<b>Firm</b>	<b>Area of Expertise</b>	<b>Position Assigned</b>	<b>Task Assigned</b>

May like to add more columns



**Annex-G “Scope of Job”**

Number of card files	1000	This number is tentative, visit PSDF office to get an accurate idea of number of files.
Number of box files	1000	
Labeling of files	File Number, Subject of file, Team (owner of file)	

**Annex-H “Financial Proposal”**

**INITIAL ONE TIME PROJECT COST**

	<b>Unit Cost without taxes</b>	<b>Applicable taxes</b>
Flat Pack boxes required to carry files - Charged at Per Box		
Transportation Charge - Fixed Charge		
Scanning Charge - Bulk Scanning (per page)		
<b>TOTAL COST</b>		

**MONTHLY RECURRING CHARGES - BACKLOG (JUST PHYSICAL STORAGE) FUTURE (PHYSICAL STORAGE & SCANNING)**

	<b>Unit Cost without taxes</b>	<b>Applicable taxes</b>
Storage Cost - Charged at Per Box Per Month		
Webportal - Charge at Per User Per Month		
Electronic Storage of Files - Charged at Per GB Used		

	<b>Unit Cost without taxes</b>	<b>Applicable taxes</b>
Storage Cost - Charged at Per Box Per Month		
Web portal - Charge at Per User Per Month		
Electronic Storage of Files - Charged at Per GB Used		
<b>TOTAL COST</b>		

**COST OF YEAR**

Cost of year must be inclusive of all applicable Government taxes. Mention timelines to complete work separately.