

PUNJAB SKILLS DEVELOPMENT FUND

Request for Proposal (RFP)

Hiring of Firm for Leadership Coaching & Training Program

March, 2020



Submission Date: March 26, 2020 on or before 03:00 PM

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

UAN: 042-111-11-PSDF(7733) | Toll Free:0800-48627 (HUNAR) | Website: psdf.org.pk

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Skills For Success

1) Invitation for Proposal

1. Punjab Skills Development Fund (PSDF) invites Technical & Financial proposals to provide consulting services for “**Hiring of Firm for Leadership Coaching & Training Program**”. Details on the assignment are provided in the Terms of Reference to this proposal.
2. The Consulting firm submitting its proposals should have the following **eligibility** for qualification for technical evaluation:
 - Should be a legal entity affiliated/Licensed from Global Organization/Firm (copy of incorporation / registration certificate along with license/affiliation certificate).
 - Provide copy of registration for National Tax Number (NTN) and General Sales Tax (GST)/ Provincial Sales Tax (PST) (if applicable) in the name of organization.
 - Must be an Active Taxpayer as per “Active Taxpayer List” of FBR (Proof required).
 - **Affidavit on stamp paper** declaring that firm is not blacklisted by any Government agency/ semi-government / authority / organization. (Original signed & stamped)

Any, failure to provide information as per the above mentioned or fulfilment under the requirement of “**Eligibility Criteria Checklist**” (FormTECH-8) shall deemed to be or declared to be ineligible for the bidding process and technical evaluation shall not be carried out.

3. The consultant will be based on the Quality and Cost Based Selection (**QCBS**) method (80% weightage for Technical and 20% weightage to be given to Financial) and procedures described in this RFP.
4. The proposal includes following additional documents:
 - Section 2 - Instructions to Consultants (including Data Sheet)
 - Section 3 - Technical Proposal - Standard Forms
 - Section 4 - Financial Proposal - Standard Forms
 - Section 5 - Terms of Reference
5. It is mandatory for proposals to be made using the Standard Forms of the proposal. Proposals that are not in the prescribed format may be discarded. If any information required in the form is found missing, or written elsewhere, no credit will be given in the relevant section of the evaluation.
6. CVs of Coaching team highlighting their prior experience should be provided by the Firm.
7. Technical and Financial proposals (to be provided in separately sealed envelope, open or provision of financial proposal in the technical proposal will lead to the rejection of Proposal) should be sent to the following address on or before **03:00 PM on March 26, 2020**:

Procurement Department
Punjab Skills Development Fund
21-A, H-Block, Dr. Mateen Fatima Road,
Gulberg-II Lahore –Pakistan

Technical Proposals shall be opened on **March 26, 2020 at 03:30 PM** by Committee in Board Room, PSDF, 21-A, H-Block, Dr. Mateen Fatima Road, Gulberg-II Lahore in the presence of firms representative. For this purpose, you are invited to attend the meeting on above mentioned date, time and venue.



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2) Instruction to Consultants

- Definitions**
- (a) “Agreement” means the Agreement signed by the Parties and all the attached documents.
 - (b) “Client” means the organization with which the selected Consultant signs the Agreement for the Services.
 - (c) “Consultant” means any entity or person that may provide or provides the Services to the Client under the Agreement.
 - (d) “Data Sheet” means such part of the Instructions to Consultants used to reflect specific conditions.
 - (e) “Day” means calendar day.
 - (f) “Government” means the Government of the Punjab and all its associated departments, agencies, autonomous/semi-autonomous bodies, local governments, boards, universities and similar other organizations.
 - (g) “Instructions to Consultants” means the document which provides Consultants with all information needed to prepare their Proposals.
 - (h) “Proposal” means the Technical Proposal and the Financial Proposal.
 - (i) “Terms of Reference” (TOR) means the document included in the proposal as Section 5 which explains the objectives, scope of work, activities, tasks to be performed, respective responsibilities of the Client and the Consultant, and expected results and deliverables of the assignment.
- 1. Introduction**
- 1.1 The Client named in the Data Sheet will select a consulting firm/organization (the Consultant) from any firm who will be eligible as per the eligibility criteria, Technical evaluation and in accordance with the method of selection specified in the Data Sheet.
 - 1.2 Consultants are required to submit a Technical Proposal and a Financial Proposal for consulting services required for the assignment named in the Data Sheet. The proposals should be in separate marked and sealed envelopes. The Proposal will be the basis for agreement negotiations and ultimately for a signed Agreement with the selected Consultant.
 - 1.3 Consultants shall bear all costs associated with the preparation and submission of their proposals and agreement negotiation. The Client is not bound to accept any proposal and reserves the right to annul the selection process at any time prior to Agreement award, without thereby incurring any liability to the Consultants.



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Conflict of Interest

1.4 It is requested that Consultants provide professional, objective, and impartial advice and at all times hold the Client's interest's paramount, strictly avoid conflicts with other assignments or their own corporate interests and act without any consideration for future work.

1.4.1 Without limitation on the generality of the foregoing, Consultants, and any of their affiliates, shall be considered to have a conflict of interest and shall not be recruited, under any of the circumstances set forth below:

Conflicting activities

(i) A firm that has been engaged by the Client to provide goods, works or services other than consulting services for a project, and any of its affiliates, shall be disqualified from providing consulting services related to those goods, works or services. Conversely, a firm hired to provide consulting services for the preparation or implementation of a project, and any of its affiliates, shall be disqualified from subsequently providing goods or works or services other than consulting services resulting from or directly related to the firm's consulting services for such preparation or implementation. For the purpose of this paragraph, services other than consulting services are defined as those leading to a measurable physical output, for example surveys, exploratory drilling, aerial photography, and satellite imagery.

Conflicting assignments

(ii) A consultant (including its Personnel and Sub-Consultants) or any of its affiliates shall not be hired for any assignment that, by its nature, may be in conflict with another assignment of the Consultant to be executed for the same or for another Client. For example, a Consultant hired to prepare engineering design for an infrastructure project shall not be engaged to prepare an independent environmental assessment for the same project, and a Consultant assisting a Client in the privatization of public assets shall not purchase, nor advise purchasers of, such assets. Similarly, a Consultant hired to prepare Terms of Reference for an assignment should not be hired for the assignment in question.

Conflicting relationships

(iii) A consultant (including its Personnel and Sub-Consultants) that has a business or family relationship with a member of the Client's staff who is directly or indirectly involved in any part of (i) the preparation of the Terms of Reference of the assignment, (ii) the selection process for such assignment, or (iii) supervision of the Agreement,

may not be awarded an Agreement, unless the conflict stemming from this relationship has been resolved in a manner acceptable to the Government of Punjab throughout the selection process and the execution of the Agreement.

1.4.2 Consultants have an obligation to disclose any situation of actual or potential conflict that impacts their capacity to serve the best interest of their client, or that may reasonably be perceived as having this effect. Failure to disclose said situations may lead to the disqualification of the consultant or the termination of its Agreement.

Unfair Advantage

1.4.3 If an interested consultant could derive a competitive advantage from having provided consulting services related to the assignment in question, the client shall make available to all interested consultants together with this proposal, and all information that would in that respect give such consultant any competitive advantage over competing consultants.

Fraud and Corruption

1.5 Client requires consultants participating in its projects to adhere to the highest ethical standards, both during the selection process and throughout the execution of an agreement. In pursuance of this policy, PSDF:

(b) defines, for the purpose of this paragraph, the terms set forth below as follows:

(i) “corrupt practice” means the offering, giving, receiving, or soliciting, directly or indirectly, of anything of value to influence the action of a public official in the selection process or in agreement execution.

(ii) “fraudulent practice” means a misrepresentation or omission of facts in order to influence a selection process or the execution of an agreement.

(iii) “collusive practices” means a scheme or arrangement between two or more consultants with or without the knowledge of the Client, designed to establish prices at artificial, non-competitive levels.

(iv) “coercive practices” means harming or threatening to harm, directly or indirectly, persons or their property to influence their participation in a procurement process or affect the execution of an agreement.

(c) will reject a proposal for award if it determines that the Consultant recommended for award has, directly or through an agent, engaged in corrupt, fraudulent, collusive or coercive practices in competing for the agreement in question.

- (d) will sanction a Consultant, including declaring the Consultant ineligible, either indefinitely or for a stated period of time, to be awarded an agreement if at any time it determines that the Consultant has, directly or through an agent, engaged in corrupt, fraudulent, collusive or coercive practices in competing for, or in executing, and
- (e) will have the right to require that a provision be included requiring Consultants to permit the Government of Punjab to inspect their accounts and records and other documents relating to the submission of proposals and agreement performance and have them audited by auditors appointed by the client.

1.6 Consultants shall furnish information on commissions and gratuities, if any, paid or to be paid to agents relating to this proposal and during execution of the assignment if the Consultant is awarded the Agreement, as requested in the Financial Proposal submission form (Section 4).

**Only one
Proposal**

1.7 Interested Consultants shall only submit one proposal. If a Consultant submits or participates in more than one proposal, such proposals shall be disqualified.

**Proposal
Validity**

1.8 The Data Sheet indicates how long Consultants' Proposals must remain valid after the submission date. During this period, Consultants shall maintain the availability of Professional staff nominated in the Proposal. The Client will make its best effort to complete negotiations within this period. Should the need arise, however, the Client may request Consultants to extend the validity period of their proposals. Consultants who agree to such extension shall confirm that they maintain the availability of the Professional staff nominated in the Proposal, or in their confirmation of extension of validity of the Proposal, Consultants could submit new staff in replacement, who would be considered in the final evaluation for agreement award. Consultants who do not agree have the right to refuse to extend the validity of their Proposals.

**2. Clarification
and
Amendment of
Request for
Proposal
Document**

2.1 Consultants may request a clarification of any of the proposal up to the number of days indicated in the Data Sheet before the proposal submission date. Any request for clarification must be sent in writing, or by standard electronic means to the Client's address indicated in the Data Sheet. The client will respond in writing, or by standard electronic means and will send written copies of the response (including an explanation of the query but without identifying the source of inquiry) to all consultants. Should the client deem it necessary to amend the proposal as a result of a clarification, it shall do so following the procedure under para. 2.2.

2.2 At any time before the submission of proposals, the client may amend the proposal by issuing an addendum in writing or by

standard electronic means. The addendum shall be sent to all consultants and will be binding on them. consultants shall acknowledge receipt of all amendments. To give consultants reasonable time in which to take an amendment into account in their proposals, the client may, if the amendment is substantial, extend the deadline for the submission of proposals.

3. Preparation of Proposals

3.1 The proposal (see para. 1.2), as well as all related correspondence exchanged by the Consultants and the client, shall be written in the language (s) specified in the data sheet.

3.2 In preparing their proposal, the consultants are expected to examine in detail the documents comprising the proposal. Material deficiencies in providing the information requested may result in rejection of a Proposal.

3.3 While preparing the Technical Proposal, alternative professional staff shall not be proposed, and only one curriculum vitae (CV) may be submitted for each position.

Technical Proposal Format and Content

3.4 The Technical Proposal shall provide the information indicated in the following paras from (a) to (g) using the attached Standard Forms (Section 3). Paragraph (c) (ii) indicates the recommended number of pages for the description of the approach, methodology and work plan of the Technical Proposal. A page is considered to be one printed side of A4 or letter size paper.

(a) A brief description of the Consultants' organization (Form TECH-2 of Section 3).

(b) A description of the approach, methodology and work plan for performing the assignment covering the following subjects: technical approach and methodology, work plan, and organization and staffing schedule. Guidance on the content of this section of the Technical Proposals is provided under Form TECH-3 of Section 3. The work plan should be consistent with the work Schedule (Form TECH-7 of Section 3) which will show in the form of a bar chart the timing proposed for each activity.

(c) The list of the proposed professional staff team by area of expertise, the position that would be assigned to each staff team member, and their tasks (Form TECH-4 of Section 3).

(d) Estimates of the staff input (staff-months of foreign and local professionals) needed to carry out the assignment (Form TECH-6 of Section 3). The staff-months input should be indicated separately for home office and field activities, and for foreign and local Professional staff.

(e) CVs of the Professional staff signed by the staff themselves or by the authorized representative of the professional Staff (Form TECH-5 of Section 3) along with their Computerized

- National Identity Card numbers (if local) or Passport numbers (if foreign).
- 3.5 The Technical Proposal shall not include any financial information. A Technical Proposal containing financial information shall be rejected and declared disqualified for further process.
- Financial Proposals**
- 3.6 The Financial Proposal shall be prepared using the attached Standard Forms (Section 4).
- Taxes**
- 3.7 The Consultant may be subject to local taxes (such as: value added or sales tax or income taxes on non-resident Foreign Personnel, duties, fees, levies) on amounts payable by the Client under the Agreement. The Client will state in the data sheet if the consultant is subject to payment of any taxes.
- 3.8 Consultants should express the price of their services in PKR. Prices in other currencies should be converted to PKR using the selling rates of exchange given by the State Bank of Pakistan for the date indicated in the data sheet.
- 3.9 Commissions and gratuities, if any, paid or to be paid by Consultants and related to the assignment will be listed in the Financial Proposal Form FIN-1 of Section 4.
- 4. Submission, Receipt, and Opening of Proposals**
- 4.1 The original proposal (Technical Proposal and, if required, Financial Proposal; see para. 1.2) shall contain no interlineations or overwriting, except as necessary to correct errors made by the consultants themselves. The person who signed the proposal must initial such corrections. Submission letters for both technical and financial proposals should respectively be in the format of TECH-1 of Section 3, and FIN-1 of Section 4.
- 4.2 An authorized representative of the consultants shall initial all pages of the original technical and financial Proposals. The authorization shall be in the form of a written power of attorney accompanying the proposal or in any other form demonstrating that the representative has been duly authorized to sign. The signed technical and financial proposals shall be marked "ORIGINAL".
- 4.3 The Technical Proposal shall be marked "ORIGINAL." The technical proposals shall be sent to the addresses referred to in para. 4.5 and in the number of copies indicated in the data sheet. All required copies of the technical proposal are to be made from the original. If there are discrepancies between the original and the copies of the technical proposal, the original governs.
- 4.4 The original and all copies of the technical proposal shall be placed in a sealed envelope clearly marked "TECHNICAL PROPOSAL" Similarly, the original Financial Proposal shall be placed in a sealed envelope clearly marked "FINANCIAL PROPOSAL" followed by the name of the assignment, and with a warning "**DO NOT OPEN WITH THE TECHNICAL PROPOSAL.**" The envelopes containing the Technical and Financial Proposals shall be placed into an outer

envelope and sealed. This outer envelope shall bear the submission address and title of the Assignment, clearly marked **“DO NOT OPEN, EXCEPT IN PRESENCE OF THE OFFICIAL APPOINTED, BEFORE SUBMISSION DEADLINE”**. The Client shall not be responsible for misplacement, losing or premature opening if the outer envelope is not sealed and/or marked as stipulated. This circumstance may be case for Proposal rejection. If the Financial Proposal is not submitted in a separate sealed envelope duly marked as indicated above, this will constitute grounds for declaring the Proposal non-responsive.

4.5 The proposals must be sent to the address/addresses indicated in the data sheet and received by the client no later than the time and the date indicated in the data sheet, or any extension to this date in accordance with para. 2.2. Any proposal received by the client after the deadline for submission shall be returned unopened.

4.6 The Client shall open the technical proposal immediately after the deadline for their submission. The envelopes with the financial proposal shall remain sealed and securely stored.

5. Proposal Evaluation

5.1 From the time the proposals are opened to the time the agreement is awarded, the consultants should not contact the client on any matter related to its technical and/or financial proposal. Any effort by consultants to influence the client in the examination, evaluation, ranking of Proposals, and recommendation for award of Agreement may result in the rejection of the consultants’ proposal.

Evaluation of Technical Proposals

Evaluators of technical proposals shall have no access to the financial proposals until the technical evaluation is concluded.

5.2 The evaluation committee shall evaluate the technical proposals on the basis of their responsiveness to the terms of reference, applying the evaluation criteria, sub criteria, and point system specified in the data sheet. Each responsive proposal will be given a technical score (St). A Proposal shall be rejected at this stage if it does not respond to important aspects of the Proposal, and particularly the terms of reference or if it fails to achieve the minimum technical score indicated in the data sheet.

Public Opening and Evaluation of Financial Proposals

5.3 Financial proposals shall be opened publicly in the presence of the consultants’ representatives who choose to attend. The name of the consultants, and the technical scores of the consultants shall be read aloud. The financial proposal of the consultants who met the minimum qualifying mark will then be inspected to confirm that they have remained sealed and unopened. These financial proposals shall be then opened, and the total prices read aloud and recorded.

5.4 The Evaluation Committee will correct any computational errors. When correcting computational errors, in case of discrepancy between a partial amount and the total amount, or between word

and figures, the formers will prevail. In addition to the above corrections, as indicated under para. 3.6, activities and items described in the technical proposal but not priced, shall be assumed to be included in the prices of other activities or items. In case an activity or line item is quantified in the financial proposal differently from the technical proposal.

- 5.5 In QCBS, the lowest evaluated Financial Proposal (Fm) will be given the maximum financial score (Sf) of 100 points. The financial scores (Sf) of the other Financial Proposals will be computed as indicated in the Data Sheet. Proposals will be ranked according to their combined technical (St) and financial (Sf) scores using the weights (T = the weight given to the Technical Proposal; P = the weight given to the Financial Proposal; T + P = 1) indicated in the Data Sheet: $S = St \times T\% + Sf \times P\%$. The firm achieving the highest combined technical and financial score will be invited for negotiations.

6. Negotiations

- 6.1 Negotiations will be held at the date and address indicated in the Data Sheet. The invited Consultant will, as a pre-requisite for attendance at the negotiations, confirm availability of all Professional staff. Failure in satisfying such requirements may result in the Client proceeding to negotiate with the next-ranked Consultant. Representatives conducting negotiations on behalf of the Consultant must have written authority to negotiate and conclude an Agreement.

Technical negotiations

- 6.2 Negotiations will include a discussion of the technical proposal, the proposed technical approach and methodology, work plan, and organization and staffing, and any suggestions made by the consultant to improve the terms of reference. The client and the consultants will finalize the terms of reference, staffing schedule, work schedule, logistics, and reporting. These documents will then be incorporated in the agreement as "Description of Services." Special attention will be paid to clearly defining the inputs and facilities required from the client to ensure satisfactory implementation of the assignment. The client shall prepare minutes of negotiations which will be signed by the client and the consultant.

Financial negotiations

- 6.3 If applicable, it is the responsibility of the consultant, before starting financial negotiations, to determine the tax amount to be paid by the consultant under the Agreement. The financial negotiations will reflect the agreed technical modifications in the cost of the services. Financial negotiations can involve the remuneration rates for staff or other proposed unit rates if there is a revision of scope or if the bid rate exceeds the available budget.

Availability of Professional staff/experts

- 6.4 Having selected the consultant on the basis of, among other things, an evaluation of proposed professional staff, the client expects to negotiate an Agreement on the basis of the professional staff named in the proposal. Before agreement negotiations, the

Client will require assurances that the professional staff will be actually available. The client will not consider substitutions during agreement negotiations unless both parties agree that undue delay in the selection process makes such substitution unavoidable or for reasons such as death or medical incapacity. If this is not the case, and if it is established that professional staff were offered in the proposal without confirming their availability, the consultant may be disqualified. Any proposed substitute shall have equivalent or better qualifications and experience than the original candidate and be submitted by the consultant within the period of time specified in the letter of invitation to negotiate.

- | | | |
|---------------------------------------|-----|--|
| Conclusion of the negotiations | 6.5 | Negotiations will conclude with a review of the draft agreement. To complete negotiations, the client and the consultant will initial the agreed agreement. If negotiations fail, the client will invite the consultant whose proposal received the second highest score to negotiate an agreement. |
| 7. Award of Agreement | 7.1 | After completing negotiations, the client shall award the agreement to the selected consultant and publish details on the Planning & Development Department website and promptly notify all consultants who have submitted proposals. After agreement signature, the Client shall return the unopened financial proposals to the unsuccessful consultants. |
| | 7.2 | The consultant shall furnish performance guarantee as specified in data sheet. |
| | 7.3 | The consultant is expected to commence the assignment on the date and at the location specified in the Data Sheet. |
| 8. Confidentiality | 8.1 | Information relating to evaluation of proposals and recommendations concerning awards shall not be disclosed to the consultants who submitted the proposals or to other persons not officially concerned with the process, until the publication of the award of agreement. The undue use by any consultant of confidential information related to the process may result in the rejection of its proposal and may be subject to the provisions of the consultant selection guidelines relating to fraud and corruption. |
| 9. Error & Omissions | 9.1 | Although adequate thoughts have been given in drafting of this document, error such as typos may occur without any responsibility on PSDF part. |

Instructions to Consultants

Data Sheet

1.1	Name of the Client: <u>Punjab Skills Development Fund</u> Method of selection: <u>Quality and Cost-Based Selection (QCBS)</u>
1.2	Financial Proposal to be submitted together with Technical Proposal: Yes <input checked="" type="checkbox"/> No <input type="checkbox"/> Name of the assignment is: “ Hiring of Firm for Leadership Coaching & Training Program ” Financial Proposal to be submitted in separate sealed envelopes. If Financial Proposal is found open, then proposal shall be rejected.
1.8	Proposals must remain valid 90 <u>Days</u> after the submission date.
2.1	Clarifications may be requested by March 20, 2020 before 5:00 PM. The address for requesting clarifications is: Address: <u>21-A, H-Block, Dr. Mateen Fatima Road, Gulberg-II, Lahore Pakistan.</u> Phone: <u>+92-42-35752408-10</u> Fax: <u>+92-42-35752190</u> Email: Procurement@psdf.org.pk
3.1	Proposals shall be submitted in the following language: <u>English</u>
3.4 (e)	CVs should contain details of <u>the projects</u> done by the coach/trainer in the past.
3.7	Amounts payable by the Client to the Consultant under the agreement to be subject to applicable taxation: Yes <input checked="" type="checkbox"/> No <input type="checkbox"/> .
4.1	Consultant Firm must submit the One Original of the Technical Proposal, and the original of the Financial Proposal in separate sealed envelopes. The financial proposal shall be rejected if found open.
4.5	The Proposal submission address is: <u>Procurement Department</u> <u>Punjab Skills Development Fund</u> <u>21-A, H-Block, Dr. Mateen Fatima Road,</u> <u>Gulberg-II Lahore –Pakistan</u> Proposals must be submitted no later than the following date and time: March 26, 2020 on or before 3:00 PM

5.2 Below are the mandatory qualification criteria to qualify for the technical evaluation.

- Should be a legal entity affiliated/Licensed from Global Organization/Firm (copy of incorporation / registration certificate along with license/affiliation certificate).
- Provide copy of registration for National Tax Number (NTN) and General Sales Tax (GST)/ Provincial Sales Tax (PST) (if applicable) in the name of organization.
- Must be an Active Taxpayer as per “Active Taxpayer List” of FBR (Proof required).
- **Affidavit on stamp paper** declaring that firm is not blacklisted by any Government agency/ semi-government / authority / organization. (Original signed & stamped)

Criteria, sub-criteria, and point system for the evaluation of Technical Proposals are:

Technical Proposal Evaluation Criteria		
Criteria for Technical Proposal Evaluation	Marks	Evidence/Proof Required
Experience of firm	20	
Providing similar coaching solutions in organizations <ul style="list-style-type: none"> • Minimum 1 but less than or equal to 3 Organizations 5 Marks • More than 3 Organizations 10 Marks 	10	PO/SO or contract copy or client satisfactory certificate
Affiliated with internationally recognized training partner for imparting coaching and training having local presence within Pakistan. <ul style="list-style-type: none"> • Minimum 1 year but less than or equal to 3 years 5 Marks • More than 3 years 10 Marks 	10	Affiliation/ Association Certificate or agreement with global partner
Coach/Trainer Profile	50	
Master Coach/Trainer of Global Partner Organizations <ul style="list-style-type: none"> • Master Coach/Trainer is Global Partner 05 Marks • Master Coach/Trainer is International Certified for Trainings 05 Marks • Foreign Qualified having more than 20 years of General experience with more than 10 years in leadership role. 10 Marks • More than 10 years of International Coaching/Training Experience in similar nature of program. 10 Marks 	30	Two coaches, one international coach as master trainer and one local associate coach to be proposed. CV of coach is required as per Tech-5
Associate Coach/Trainer of Local Partner Organizations <ul style="list-style-type: none"> • Associate Coach/Trainer is Local Partner (05 Marks) • Associate Coach/Trainer is International Certified for Trainings (05 Marks) • Local Qualified having more than 15 years of General experience with more than 5 years in leadership role. (05 Marks) • More than 3 years of Coaching/Training Experience in similar nature of program. 05 Marks 	20	

	<table border="1"> <tr> <td>Coaching & Training Methodology</td> <td>30</td> <td></td> </tr> <tr> <td> Provision of globally recognized learning material to the participant <ul style="list-style-type: none"> • Original & Research-based international content & methodology (10 Marks) • Internationally recognized manuals and reference material (10 Marks) • Progress report (10 Marks) <ul style="list-style-type: none"> ○ Clearly defined Development Plan ○ Specific Structure ○ Coachee & Trainer Feedback </td> <td></td> <td>Provide Presentation /Detail of material along with name of global partner and supporting documents</td> </tr> <tr> <td>Grand Total</td> <td>100</td> <td></td> </tr> <tr> <td colspan="3"><i>The minimum qualifying technical score is 65%.</i></td> </tr> </table>	Coaching & Training Methodology	30		Provision of globally recognized learning material to the participant <ul style="list-style-type: none"> • Original & Research-based international content & methodology (10 Marks) • Internationally recognized manuals and reference material (10 Marks) • Progress report (10 Marks) <ul style="list-style-type: none"> ○ Clearly defined Development Plan ○ Specific Structure ○ Coachee & Trainer Feedback 		Provide Presentation /Detail of material along with name of global partner and supporting documents	Grand Total	100		<i>The minimum qualifying technical score is 65%.</i>		
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Grand Total	100												
<i>The minimum qualifying technical score is 65%.</i>													
	The minimum technical score, St, required to qualify for financial opening is: 65 points												
5.3	<p>The formula for determining the financial scores is the following: $S_f = 100 \times F_m / F$, in which S_f is the financial score, F_m is the lowest price and F the price of the proposal under consideration. The weights given to the Technical (T) and Financial Proposals (F) are: $T = 80\%$ and $F = 20\%$</p>												
6.1	Expected date and address for agreement negotiations: Expected date: April 10, 2020												
7.2	Successful bidder shall furnish 1% performance guarantee before signing the contract.												
7.3	<p>Expected date for commencement of consulting services April 15, 2020 at:</p> <p>Procurement Department Punjab Skills Development Fund 21-A, H-Block, Dr. Mateen Fatima Road, Gulberg-II Lahore –Pakistan</p>												

3) Technical Proposal - Standard Forms

Refer to Reference Paragraph 3.4 of the Data Sheet for format of Technical Proposal to be submitted, and paragraph 3.4 of Section 2 of the proposal for Standard Forms required and number of pages recommended.

TECH-1 Technical Proposal Submission Form

TECH-2 Consultant's Organization and Experience

A Consultant's Organization

TECH-3 Description of the Approach, Methodology and Work Plan for Performing the Assignment

TECH-4 Team Composition and Task Assignments

TECH-5 Curriculum Vitae (CV) for Proposed Professional Staff

TECH-6 Staffing Schedule

TECH-7 Work Schedule

TECH-8 Eligibility Criteria Checklist



Skills For Success

Form TECH-1 Technical Proposal Submission Form

Location: _____ Date _____

To:

Dear Sir,

We, the undersigned, offer to provide the consulting services for PSDF Hiring of Firm for Internal Audit in accordance with your proposal dated [Date]. 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.

If negotiations are held during the period of validity of the Proposal, i.e., before the date indicated in Paragraph Reference 1.8 of the Data Sheet, we undertake to negotiate on the basis of the proposed staff. Our Proposal is binding upon us and subject to the modifications resulting from Agreement negotiations.

We undertake, if our Proposal is accepted, to initiate the consulting services related to the assignment not later than the date indicated in Paragraph Reference 3.1 of the Data Sheet.

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

We remain,

Yours sincerely,

Authorized Signature [*In full and initials*]: _____

Name and Title of Signatory: _____

Name of Firm: _____

Address: _____

Form TECH-2 Consultancy Firm’s Organization and Experience

A - Consultant’s Organization

[Provide here organogram of your firm and information as per below format]

1. Organogram

Organizational Information			
Sr. No.	Required Information	Response	
1	Legal name of the organization		
2	Year of Registration / Establishment of the Organization		
3	National Tax Number		
4	General / Punjab Sales Tax Number		
5	What is the legal status of your organization? Tick the relevant box (one box only). (Attach Copy/Copies of Registration Certificate/s)	Public Sector Organization	
		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:		



Skills For Success

Form TECH-3 Description of Approach, Methodology and Work Plan for Performing the Assignment

[Technical approach, methodology and work plan are key components of the Technical Proposal. You are required to present your Technical Proposal as per the criteria list in Technical evaluation in the proposal]

a) Approach and Methodology

Please be precise and to the point in addressing the objectives of this assignment through proposed approach and methodology.

Technical approach, methodology and work plan are key components of the Technical Proposal. You are suggested to present your Technical Proposal divided into the following chapters:

- i. Technical Approach and Methodology
- ii. Work Plan & Timeline

i. Technical Approach and Methodology

In this chapter you should explain your understanding of the objectives and scope of Job/TORs of the assignment, approach to provide these services, and methodology for carrying out the assignment.

You may highlight the problems being anticipated by you in this assignment and their importance and explain the technical approach you would adopt to address them. You may also be invited for a presentation on your proposed methodology and evaluation will be done on the basis of followings:

- Interpretation of scope and objectives of assignment.
- Understanding of assignment deliverables.
- Overall methodology adopted and approach to conduct the assignment.

ii. Work Plan

In this chapter you should propose your work plan against the main activities of the assignment, their content and estimated duration, describing phasing and interrelations and milestones. The proposed work plan should be consistent with the technical approach and methodology, showing clear understanding of the TORs and ability to translate them into a deliverable working plan. The work plan should be consistent with the Work Schedule of Form TECH-7.

Form TECH-4 Team Composition and Task Assignments

Professional Staff					
Name of Staff	CNIC No./Passport No.	Firm	Area of Expertise	Position Assigned	Task Assigned

Form TECH-5 Curriculum Vitae (CV) for Proposed Professional Staff

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)*]:

<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: _____

3) 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.

_____ Date: _____

[Signature of staff member or authorized representative of the staff]

Day/Month/Year

Full name of authorized representative: _____



Form TECH-6 Staffing Schedule

Full time input

Part time input

Year:																	
N°	Name of Coach	Staff input (in the form of a bar chart) ²												Total staff-month input			
		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Home	Field ³	Total	
1		1-1 (Skype) Session															
2																	
3																	
N																	
												Subtotal					
												Total					

Form TECH-7 Work Schedule

Year:														
N°	Activity ¹	Coach	Months											
			Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
1														
2														
3														
4														
5														
n														

Form TECH-8 Eligibility Criteria Checklist

Eligibility Criteria Checklist				
Sr. No.	Eligibility Criteria Details	Evidence/Proof Required	Attached Supporting Documents/Proof and mark Yes/No	
			Yes	No
1	Should be a legal entity affiliated/Licensed from renowned Global Organization/Firm (copy of incorporation / registration certificate along with license/affiliation certificate).	Evidence of incorporation / registration certificate along with license/affiliation certificate	<input type="checkbox"/>	<input type="checkbox"/>
2	Provide copy of registration for National Tax Number (NTN) and General Sales Tax (GST)/ Provincial Sales Tax (PST) (if applicable) in the name of organization.	Evidence of proof to be attached	<input type="checkbox"/>	<input type="checkbox"/>
3	Must be an Active Taxpayer as per "Active Taxpayer List" of FBR (Proof required).	Evidence of proof to be attached	<input type="checkbox"/>	<input type="checkbox"/>
4	Affidavit on stamp paper declaring that firm is not blacklisted by any Government agency/ semi-government / authority / organization. (Original signed & stamped)	Affidavit on stamp paper original signed & stamped	<input type="checkbox"/>	<input type="checkbox"/>



4) Financial Proposal - Standard Forms

Financial Proposal Standard Forms shall be used for the preparation of the Financial Proposal according to the instructions provided under para. 3.6 of Section 2. Such Forms are to be used whichever is the selection method indicated in para. 4 of the Letter of Invitation.

FIN-1 Financial Proposal Submission Form

FIN-2 Summary of Costs



Form FIN-1 Financial Proposal Submission Form

[Location, Date]

To: [Name and address of Client]

Dear Sir,

We, the undersigned, offer to provide the consulting services for PSDF "Hiring of Firm for Internal Audit" in accordance with your proposal dated [Insert Date] and our Technical Proposal. Our attached Financial Proposal is for the sum of [Insert amount(s) in words and figures!]. This amount is inclusive of the taxes.

Our Financial Proposal shall be binding upon us subject to the modifications resulting from Agreement negotiations, up to expiration of the validity period of the Proposal, i.e. before the date indicated in Paragraph Reference 1.8 of the Data Sheet.

No commissions or gratuities have been or are to be paid by us to agents relating to this Proposal and Agreement execution.

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

We remain,

Yours sincerely,

Authorized Signature [In full and initials]: _____

Name and Title of Signatory: _____

Name of Firm: _____

Address: _____

Form FIN-2 Summary of Costs

Item	Cost without Taxes	Applicable Taxes	Taxes Amount	Costs including all applicable Taxes
	PKR	%	PKR	PKR
Local Coach/Trainer Cost (PKR)				
International Coach/Trainer Cost (PKR)				
Training Material Cost (PKR)				
Total Costs of Financial Proposal (PKR)				

Cost Breakup also to be shared as per the deliverable mentioned in Terms of Reference (Section 5 (c)).

PSDF shall not provide any travel & accommodation to the local & international coach/trainer.

Payment Terms:

- Upon successful completion of deliverable as per below milestone, payment shall be made within 30 days after the submission of invoice.
- All the payment shall made in the PKR after the deduction of all applicable taxes.

Sr. No	Payment Milestone	Payment %
1	Leadership Profile Analysis & Objective Setting Session	20%
2	Leadership Framework Training	25%
3	Completion on 50% Follow up Coaching Sessions	25%
4	Completion on Remaining 50% Follow up Coaching Sessions	25%
5	Concluding Session	5%

5) Terms of Reference

a) Scope of Work:

- The consultant firm should use a combination of accredited and research-driven global leadership frameworks for coaching solution that enable managers to adapt and match their leadership style to that of their influencers.
- Review the coaching and development needs of selected high potential people managers and develop customized learning and coaching objectives for each.
- Prepare a comprehensive development plan based on research-driven global frameworks with emphasis to develop their leadership capacity through a combination of engaging and practical activities.
- Engage the line managers of selected high potential people managers to set goals around development areas.
- Develop detailed curriculum for all relevant trainings and learning interventions.
- Globally recognized coaching solution on the skillset they need to guide their people through predictable stages of development and provide them with what they need to be successful.
- Implement the coaching solution using a portfolio of highly accredited and experienced coaches and consultants, experienced in working with renowned corporate organizations, who can leverage their expertise with proven results.
- Engage coachees in experiential activities, trainings and skill-building exercises through a portfolio of assignments and activities that unlocks discretionary effort, builds leadership capacity and enhances their performance management through robust and real-life practice.
- Provide a highly engaging learning program that helps assimilate strategies to deepen and extend their learning to become proficient in using and matching the required leadership style.
- Coaching tools and reference material for continuous and life-long learning.
- On-demand support and tools to diagnose development needs at any given point in time.
- In person training & session will be conducted in Lahore, however, online session shall be as per the trainer and trainee convenience.

b) Required Coaching Team Composition

Coaching team proposed by Consulting Firm must consist of one Master Trainer (International Coach) and one Associate Coach (Local Coach). CVs to be attached as per **TECH-5 of Section3**. It is Mandatory that proposed coaches/trainers are from same organization, however, Master Coach can be from international/Global affiliated partner firm. The brief requirement of the incumbents is provided below:

Master Coach:

- i. Foreign Qualified having minimum 20 years of General experience with at least 10 years in leadership role.
- ii. Minimum 10 years of International Coaching/Training Experience in similar nature of program.

Associate Coach:

- i) Local Qualified having more than 15 years of General experience with more than 5 years in leadership role.
- ii) More than 3 years of Coaching/Training Experience in similar nature of program.

c) Duration and Deliverables:

- The successful firm shall sign and execute the standard contract of PSDF including any general conditions on the terms and conditions specified therein. Any amendment to the contract shall be made with mutual consent of both parties.
- The duration of the contract shall be for one year; however, it may be extended on mutual consent.
- Deliverables with audience is provided below

S#	Activity	Deliverable & Details	Target Audience	To be conducted by
1	Leadership Profile Analysis	Effective approaches and measures to diagnose the leadership style of the coachees.	4	Master coach (International trainer)
2	Objective Setting Session	Coaching Goals: Based on 1-1 discussions with Coachee's Functional Manager and Coachee, identify specific expectations with respect to coaching interventions identified, documented and agreed with coachee.	8	As assigned
3	Leadership Framework Training	Training program for selected people managers around a research-driven and global leadership framework along with their direct reports.	15	Master coach (International trainer)
4	6-8 Follow up Coaching Session Tools & Techniques	Utilization of various customized tools and techniques in the coaching sessions using leadership frameworks/programs. Customization of tolls on need basis. At least two sessions shall be conducted in person whereas remaining may be delivered online. Each coaching session should be of at least an hour	4	As assigned
5	Concluding Session	Coachee & Manager Feedback	8	As assigned