

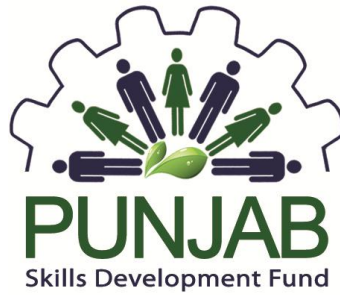
# PUNJAB SKILLS DEVELOPMENT FUND

## TENDER DOCUMENT

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### HIRING OF HR CONSULTING FIRM

May, 2017



**Submission Date for Sealed Bids: 2<sup>nd</sup> June, 2017 (10:30 AM)**

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

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## **1- Background**

PSDF is a not-for-profit Fund that invest in the development of vocational skills of the poor and vulnerable youth of Punjab; the largest province of Pakistan with 100 million population. The Fund has been set up by the Government of Punjab in partnership with DFID and size is USD 170M. The Fund also exclusively manages an additional USD 50M skills development funding of the World Bank. With its unique operating model, the Fund conducts all its training through 3<sup>rd</sup> party training providers primarily in the private sector and reducing the cost per trainee significantly. It also monitors and evaluates every training program outcomes through Ernest & Young (EY); 3<sup>rd</sup> party monitoring and evaluation firm. The Fund also compensates the training providers on the number of graduates that complete the program rather than the number enrolled. In order to ensure that the trainings are aligned with the economic development and opportunities available, the Fund is increasingly signing up with private sector business to get engaged in better training outcomes and ensure employability of the graduates. A big component of our focus is to train women in market-driven skills and increase their labour force participation rate. For this, we have designed exclusive programs aiming formal and self-employment. The Fund also started to sign up large employers in the GCC and Southeast Asia so they can hire skills workforce from Pakistan.

## **2- Invitation to Bids**

PSDF is seeking the assistance of a consulting firm to provide guidance on training PSDF's HoDs on conducting effective performance appraisals and Target Setting for the next year.

## **3- Instructions to Consultant Firms**

PSDF invites technical and financial proposals from consultant firms. All interested organizations are requested to complete the Forms & Annexures given in this document. These annexures/forms cover information/questions on the firm/s profile and relevant experience.

The selection of consultant firms will be based on Quality and Cost Based Selection (QCBS) method. PSDF will adopt single stage two envelopes bidding procedure to call for proposals.

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 of this 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 sections “Technical Proposal” and “Financial Proposal” of the document.

The scope of activities set the basis of technical approach to be adopted by the potential consultant firms. The firms who will get minimum 65 marks in technical evaluation will be called for financial bid opening and top ranked firm will be called for contract negotiations.

#### **4- Conditions for Eligibility (Qualification criteria)**

The ideal Consultant firm will have proven expertise of this assignment. The entity interested in submitting must fulfil the following eligibility conditions:

- i. Must be a legal entity registered in Pakistan or country of origin since at least 10 years, and must have a corporate office in Pakistan.
- ii. Must have National Tax Number (NTN) & Punjab Sales Tax Number (PSTN).
- iii. Must be an active taxpayer in Pakistan and provide the tax return of the last two fiscal Year
- iv. Must have minimum annual turnover of PKR 20 million as per audited financial statements.
- v. Must submit audited financial statements of two most recent years issued by an Institute of Chartered Accountants of Pakistan (ICAP)-licensed Chartered Accountant. The statements must include Auditors’ Report, Balance Sheet, Income & Expenditure Statement of Account, Cash Flow Statement and related Notes to the Accounts as well as cover letter of audit firm mentioning name and contact details of the auditor.).
- vi. Must not be blacklisted by any government or bi-lateral/multi-lateral financial institution.
- vii. Must not be a shortlisted applicant for training provision under any of the PSDF sponsored training scheme.

#### **5- Scope of Work**

This scope of work is inclusive of but not limited to the attached annexure – F.

#### **6- Terms of Reference**

- a. Consultant Firm must not be providing any assistance to any other person/entity in conflict with ‘PSDF’ to avoid any sort of conflict of interest.
- b. All direct & indirect taxes will be deducted in accordance with the provisions of Government Rules amended time to time.
- c. Successful Consultant Firm will sign a service contract and will provide the agreed services within the stipulated agreed time of issuance of the purchase order. While delay in providing services, a penalty at the uniform rate of 2% of contract value on each day delay will be charged in case of delay.
- d. If the firm completely fails to provide the services within prescribed period of service delivery and doesn’t comply with the reminders, the case of consultant firm may be put to relevant authorities to declare the Firm as "Black Listed".
- e. Payment of consultancy services will be made on the satisfactory completion of services.

- f. The consultant Firm must respond efficiently for providing consultancy services in a timely manner.
- g. In case of any dispute regarding services; the decision of the PSDF shall be final & binding.

## **7- Guidelines**

- a) Only short-listed firms fulfilling the eligibility criteria will be considered for technical and financial proposals. The financial proposal of technically qualified consultant firms will be opened for further evaluation.
- b) All documents and information received by PSDF from applicants will be treated in strict confidence.
- c) 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) Documents shall be submitted in a separate sealed envelopes marked as “TECHNICAL PROPOSAL” and “FINANCIAL PROPOSAL” as hard copy in a sealed envelope for ‘Skills Needs Assessment of Export-Led Sectors’. Technical proposal must also be provided in soft form (word form) in a flash drive (USB). The envelope containing hard and soft copy of technical proposal and financial proposal shall be received on the postal address given below.
- f) The closing date and time for receipt of technical proposal is **2nd June, 2017 (10:30 AM)** and will be publically opened on same day i.e. **2nd June, 2017 at 11:00 AM** in the conference room PSDF Lahore Office, in the presence of the interested consultant firms or their representatives who may wish to attend.
- g) Technical and financial proposals received thereafter will not be accepted.
- h) PSDF reserves the right to request submission of additional information from applicants in order to clarify/further understand aspects of technical proposal, if required.
- i) PSDF reserves the right to verify any information provided by the applicants.
- j) The competent authority may reject all bids or proposals at any time prior to the acceptance of a bid or proposal. The procuring agency 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.
- k) Prices quoted shall remain valid for a period of 120 days from the closing date of proposal.
- l) 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 26<sup>th</sup> May, 2017**. For any other related information please contact the undersigned.

Manager Human Resource  
Punjab Skills Development Fund  
21-A, H-Block, Dr. Mateen Fatima Road,  
Gulberg-II Lahore –Pakistan  
E-mail: zainab.kakar@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.

Technical proposal should contain following and any additional information related to the assignment. Copies of all required documents must be attached in technical proposal for evaluation.

### 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

#### 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.

#### 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.

### b) Relevant Experience

Please provide detailed information on a maximum of **three** consultancy assignments most relevant to this assignment, in which the firm was engaged. Please use Form ‘B’ in annexure – C for each of the ‘Three assignments’ information.

**c) Team Structure**

The team should comprise a Team Leader with Technical Experts. Please use Form “C” in Annex – D to provide information on three of the permanent/full-time key management staff who will be engaged in the project. Please enclose/attach their CVs.

**9- Financial Proposal**

Please refer to the annexure titled “Financial Proposal”, attached as annexure – G. Financial bid shall be submitted in a separate sealed envelope and should be inclusive of all applicable taxes like WHT PSTN & FED (if applicable). Any future tax will be adjusted as per tax law.

**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**

Contract will be a time bound task base (a complete job) contract that includes but not limited to the scope of job and terms of references. Contract will be valid for contract period from date of signing of contract which may be extended on same TORs after mutual agreement.

**12- Pre-proposal Meeting**

A pre-proposal meeting will be conducted on 25<sup>th</sup> May, 2017 at 2:00 PM in PSDF office for clarification of queries and more understating of the project.

**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 all required information & documentary evidences may be delivered to CEO, PSDF, 21-A, H-Block, Dr. Mateen Fatima Road, Gulberg-II Lahore and submitted before **10:30 AM on 2nd June, 2017**. Technical proposals will be publically opened on the same day i.e. **2nd June, 2017 at 11:00 AM** in the presence of consultant firm's representatives who wish to attend the bid opening.

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 (Form 'A')
- Annex – B: Eligibility Response Checklist
- Annex – C: Relevant Experience of the Organisation (Form 'B')
- Annex – D: Key Management Staff of Firm (Form 'C')

And also sign the declaration form at the end of document and attach with your other documents.

#### 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:

**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		
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	
		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	Mention the name of Registration Authority/s under which organisation/firm is registered and provide a copy of proof of registration to prove legal identity of your firm		Copies Attached
			Copies Not Attached
2	Attach copy of certificate/list representing as an active taxpayer in country of origin		Copies Attached
			Copies Not Attached
3	Attached last audit reports of the two most recent years issued by an Institute of Chartered Accountants of Pakistan (ICAP)-licensed Chartered Accountant or ICAP-equivalent authority/body in country of origin that show minimum PKR 20 Million of annual turnover.		Copies Attached
			Copies Not Attached
5	Provide the tax return of the last 2 fiscal Year		Copies Attached
			Copies Not Attached
6	Mention National Tax Number (NTN) and Punjab National Tax Number (PNTN) in the name of Organization and provide a copy of registration	National Tax Number (NTN)	
		Punjab National Tax Number (PNTN)	
7	Attach list of technical team for the subject assignment.		Attached
			Not Attached
9	Was your firm ever blacklisted by any government authority or any bi-lateral/multi-lateral financial institution? (Attach an undertaking by your firm’s authorised person with this technical proposal)		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.
10	Should not be a shortlisted applicant for the training provision or for provision of any other services under any of the PSDF sponsored scheme/programmes		Yes
			No

**Annex - C “Relevant Experience”**

<b>Form ‘B’: Relevant Experience (Project Sheet 1<sup>1</sup>)</b>			
<b>Sr. #</b>	<b>Required Information</b>	<b>Response (Please provide exact information with project title, location/s and duration)</b>	
1	Project Title and duration (The project title means the actual name of the project)		
2	In no more than 100-150 words please elaborate your role in relevant consultancy assignments	Attach a separate Page	
3	Task or activity duration in months		
4	Location/s (districts/tehsils)		
5	Please specify the magnitude of project	<b>Relevant Indicator</b>	<b>Value</b>

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<sup>1</sup>Please mark the other two sheets (if filling) as Project Sheet 2 and Sheet 3 respectively.

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

<b>Form ‘C’: Key Management Staff Information (Sheet 1<sup>2</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 relevant consultancy project undertaken by the individual			
9	Specify the scope & size of the project (total budget, geography, quantum of activity & intervention areas e.g. skills training, HRD etc.)			
10	Specific role of the individual in this project			
11	Please provide information on additional experience in HR consultancy projects			
	<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>2</sup>Please mark the other two sheets as Sheet 2 and Sheet 3 respectively for each individual.

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

Sr. No.	Category	Marks
1	Approach and Methodology	45
2	Relevant Experience	20
3	Team Structure	35
<b>Total:</b>		<b>100</b>

## **Annex –F “Scope of Work”**

### **Performance Appraisal and Target Setting Support for current year 2016- 17**

Train Heads of Department on:

- i. Conducting effective performance appraisals.
- ii. Conducting self-appraisals and documenting employee performance.
- iii. Conducting structured appraisal meetings and giving and receiving positive and constructive feedback on an ongoing basis.
- iv. Defining clear performance criteria.
- v. Linking the performance management system with retention, development, and succession planning initiatives.
- vi. Managing expectations around annual increases.
- vii. Assisting employees with performance improvement.
- viii. Target setting and aligning strategic goals to people development.
- ix. Preparing individual performance plans and setting developmental goals.

#### **A. Scope of the assignment**

The consultant is responsible for the following deliverables:

- i. Completion report on first appraisal orientation.
- ii. Complete training manuals and tool kits.

#### **B. Required Skills and Experience**

Firms who wish to be considered for the services described herein should have the following qualifications:

- 1) Education: The team must consist of experts who each possess Post Graduate/ Master’s Degree if from Pakistan recognized by HEC or at least 16 years of academic education from a reputable foreign university.
- 2) Experience & Skills Required:
  - i. The team must consist of experts who possess at least 10-15 years of leadership experience in the HR field in public and private sector. The firm must have demonstrated experience of leading the strategic HR Function of a large private sector or multinational organization.
  - ii. In addition to strategic Corporate/Private Sector work experience in HR, the firm should have some exposure of working with the Public Sector/ Government Sector of Pakistan.
  - iii. Demonstrated knowledge and experience of running complete performance management cycles.
  - iv. Fluency, both in written and spoken English.
  - v. The firm submitting proposals should have the following minimum qualifications:
  - vi. Evidence of incorporation/company registration number.
  - vii. Active taxpayer. Proof of tax return filed by applicant firm in 2015/16.

- viii. Last two year audited financial statements.

### **C. Duration of assignment**

The total level of effort for this assignment is (1) week. This timeline may be extended with mutual consent.

### **D. Deliverables**

The consultant shall deliver the following:

#### **Performance Appraisal**

- I. Preparation for Training
  - Toolkits
  - Frequently Asked Questions
  - Do's and Don'ts
  - Role Play Material
- II. Conducting Training
  - Introduction to Performance Appraisal
  - Performance Appraisal Training
  - Individual Sessions
  - Role play in different scenarios
- III. Observation Report
  - Sit in actual performance appraisal meetings
  - Score each Head of Department and Manager on the performance appraisal meetings conducted
  - Prepare Technical as well Behavioural Development Needs Report

#### **Target Setting for Next Year**

- i. Approach and Methodology of Setting Business Targets
- ii. Training on Setting Team Targets
- iii. Setting Actual Targets based on the Performance Management System

### **E. General Conditions**

- i. All work by the consultant should be carried out collaboratively with the Manager HR.
- ii. An agreement shall be drawn between PSDF and the Consultant, before the commencement of the Consultancy service.
- iii. All the data, documents and reports produced by the Consultant for the said services shall be the property of the Client.
- iv. The Consultant shall not share and use any data, document and reports for any other purpose I job without the explicit written approval of the Client.

### **F. Payment Terms**

Payment under the contract will be output based and will be made upon satisfactory completion of the assignment.



**Annex-G “Financial Proposal”**

Bid Price inclusive of all direct & indirect taxes (i.e. WHT, FED, PST)
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Financial proposal in detailed segments is required with individual as well as total cumulative cost.
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