# Request for Proposal (RFP)

**for**

## Data Entry Services for Household Survey for Assessment of Out of School Children in Khyber Pakhtunkhwa

## 2016-17

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**Last Date for Submission of Proposal:** 15 days within date of Advertisement

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## Government of Khyber Pakhtunkhwa

**Directorate of Elementary and Secondary Education**
**Peshawar.**
**www.kpese.gov.pk**

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# Data Entry Services for Household Survey for Assessment of Out of School Children in Khyber Pakhtunkhwa Data Sheet

| | | |
|---|---|---|
| 1 | Bid Inviting Authority, Designation and Address | Secretary to Government of Khyber Pakhtunkhwa, Elementary & Secondary Education Department |
| 2 | a. Name of the Work<br><br>b. Tender Reference<br><br>c. Place of execution | Data Entry Services for Household Survey for Assessment of Out of School Children in Khyber Pakhtunkhwa<br><br>Advertisement<br><br>All districts of Khyber Pakhtunkhwa. |
| 4 | Due Date, Time and Place of submission of Bid Documents. | Bid Documents shall be submitted within 15 day of the advertisement up to **1200 hours** to Deputy Director (P&D), Directorate of Elementary & Secondary Education, Hashtnagri, Adjacent GHSS No.1, Peshawar<br><br>Phone # 091-9211773 |
| 5 | Date , Time and Place of Technical Proposal opening | **15/12/2016** at **1400** hours in the Committee Room of Directorate of Elementary & Secondary Education, Peshawar. |
| 6 | Date, Time and Place of opening of the Financial Proposals. | Shall be intimated subsequently to Technically Qualified Bidders |
| 7 | Validity of Bid | 90 Days From the Date of Opening of Technical Proposal |

# Letter of Invitation

Dear Mr./Ms.:

1. The Elementary & Secondary Education Department, Government of Khyber Pakhtunkhwa, Peshawar (hereinafter called "Procuring Entity") invites proposals for **Data Entry Services for Household Survey for Assessment of Out of School Children in Khyber Pakhtunkhwa**. More details on the services are provided in the Terms of Reference.

2. A firm will be selected under Quality and Cost based Selection (QCBS) and procedures described in this RFP, in accordance with the KPPRA 2014.

3. The RFP includes the following:

1 - Letter of Invitation
2 – Instruction to Firms
3 – TORs
4 – Evaluation Criterion
5 – General

Yours truly,

Deputy Director
Directorate of Elementary & Secondary Education,
Government of Khyber Pakhtunkhwa
Peshawar. Tel 091-9211773

# SECTION - I

## Terms o Reference

### 1. CONTEXT AND INTRODUCTION

Khyber Pakhtunkhwa (KP), like other provinces of Pakistan, is host to a considerable number of children who drop-out at various stages of the education cycle and those who have never been to a school. However, one of the major challenges regarding OOSC is the variation in different data sources and disagreement on the number of children which are out of school in the province.

Elementary and Secondary Education Department (ESED) is implementing Education Sector Plan (ESP) and one of the key goals of ESP is to ensure provision of free quality education to school age boys and girls in KP. However, the above highlighted issues regarding reliability and validity of existing source of OOSC estimates, makes it difficult to plan and implement initiatives for bringing all out-of-school children in the education system. The available data is not only unreliable but also in sufficient, as it does not inform about where these OOSC are located within the province? And why they are out of school?. It is important to note that besides mapping OOSC the department also desires to know in which institutions (i.e. public, private, madrassa, etc.) currently enrolled school age children are? This information is required in order to make sure that realistic five year Education Sector Plan is prepared for improved education services and coverage at the provincial and district levels.

### 2. OBJECTIVES

ESED has planned to conduct a province wide complete survey of children aged 0-17 years. There are two primary and three secondary objectives of this survey.

The primary objectives of this survey are:

- To measure the number of children, among 0-17 years of age, not currently attending any type of school (Out-of-school children) in KP.
- To map the location of out-of-school children of the province (how many in each district and village?).

The secondary objectives are to:

- Measure the number of children, among 0-17 years of age, currently attending any school in KP.
- Know in which type of school and at what level of grades in-school children are?
- Know what are the reasons, among out-of-school children for not attending and dropping out of school?

## 3. SCOPE OF WORK

In the above context, ESED is undertaking an initiative to conduct the OOSC survey in the province with the aim to get complete and accurate data about number and location of all OOSC in the province. The aim for OOSC survey is to get more realistic figures and latest data which will help in effective planning and service delivery under the new Education Sector Plan which is operational since July 1, 2015. In this context, Institute of Social and Policy Sciences (I-SAPS) has been engaged to provide technical services for the design, planning, data analysis and report writing of the OOSC Survey. All other tasks ranging from printing of questionnaires, lists, maps and other materials to logistic arrangements for the trainings as well as engagement of staff for field data collection and field monitoring will be carried out by ESED.

For data entry of OOSC survey forms, ESED intends to hire a firm (reflecting in active tax payer list) to carry out following data entry and data management services:

1. The firm will be responsible for the development of the software to be used for data entry. Specific responsibilities include developing software and set up the network system for Data Entry, including the process by which all data are stored on the server and the first data entry and the second (10% verification data entry) are automatically updated on the server. OOSC Survey Form is annexed to TORs
2. Firm will coordinate with focal person at DEO offices for collection of filled OOSC survey forms for editing and data entry. Once these forms entered in database, firm will be responsible to return OOSC form to focal person.
3. The firm will undertake editing of more than 3.7 million survey forms as per the guidelines shared by ESED. A unique serial number will be assigned to all the questionnaires/survey forms handed over to the firm by ESED. The firm will devise the mechanism to store and manage the edited survey forms after their receipt. The instructions manual of the questionnaire will be taken as the guiding document during editing process.
4. The firm will arrange space for data entry operation at district level and establish Data Entry Centers equipped with computers, backup generators and other equipment on its own. An adequate number of staff including Data Entry Operators and Data Entry Supervisors to be deployed at each district to ensure successful Data Entry of Survey Forms on at-least an average of 80,000 forms per day to complete the data entry of more than 3.76 Million forms over duration of four weeks with no break. District-wise approximate number of OOSC Survey Forms is as under:

| District | OOSC Forms | District | OOSC Forms | District | OOSC Forms |
|---|---|---|---|---|---|
| ABBOTTABAD | 229,287 | HANGU | 46,205 | NOWSHERA | 174,078 |
| BANNU | 117,277 | HARIPUR | 180,626 | PESHAWAR | 407,472 |
| BATTAGRAM | 80,339 | KARAK | 75,173 | SHANGLA | 92,963 |
| BUNER | 96,637 | KOHAT | 123,239 | SWABI | 230,495 |

| | | | | | |
|---|---|---|---|---|---|
| CHARSADDA | 223,140 | KOHISTAN | 127,364 | SWAT | 242,400 |
| CHITRAL | 69,304 | LAKKI MARWAT | 92,213 | TANK | 43,983 |
| DI KHAN | 194,277 | MALAKAND | 78,045 | TORGHAR | 43,177 |
| DIR LOWER | 144,648 | MANSEHRA | 242,225 | | |
| DIR UPPER | 107,062 | MARDAN | 298,154 | | |

5. Support to OOSC Survey Technical Assistance team for generating data tables as per tabulation plan for data analysis and drafting of OOSC Survey Report
6. The data entry firm shall ensure and comply with the Quality Assurance methodology agreed with ESED in advance. The entered data will be the property of ESED and the firm hired will provide facility to keep back-up. The Firm will be responsible to establish and maintain special security features and measures at its Data Entry site to ensure the confidentiality and security of all data (hard and soft formats).
7. The firm will be responsible to set mechanism for sharing a daily progress report specifying the number of forms completed, missed out and re-entered.
8. The firm will undertake double data entry of 10% of OOSC Survey forms. The firm shall also perform cleaning of all data entered as advised by ESED. The firm shall retain and store the completed questionnaires in a manner which protect confidentiality.

## 4. DELIVERABLES

- Editing and data entry of more than 3.76 million survey forms as per the guidelines shared by ESED
- Data validation by double data entry of 10% of OOSC Survey forms
- Data tables as per tabulation plan for data analysis and drafting of OOSC Survey Report
- Submission of final OOSC Survey Database

## 5. SCHEDULE OF DELIVERY

Start date: 07/11/2016 End date: 20/01/ 2017

## 6. MANAGEMENT/REPORTING.

The firm will report to Director Elementary and Secondary Education.

## 7. OOSC SURVEY FORM.

H0 مکان نمبر

H1. گھرانے کا سیریل نمبر:

H2. منسلک صفحات

### Form H - والدین کا سوالنامہ

### ایلیمنٹری اینڈ سیکنڈری ایجوکیشن ڈیپارٹمنٹ، خیبر پختونخوا

### 17 سال اور اس سے کم عمر بچوں اور بچیوں کا سروے

[پڑھیں] ہم آپ کے تمام بچوں اور بچیوں کی تعلیم کے بارے میں سوال کرنا چاہتے ہیں جن کی عمر 17 سال اور اس سے کم ہے۔

**[ہدایت: ایک مکان میں رہائش پذیر 17 سال اور اس سے کم عمر کے بچے / بچیوں کے والد / والدہ کا انٹرویو کرنا ہے۔ والد یا والدہ کی عدم دستیابی کی صورت میں گھر کے کسی ذمہ دار فرد کا انٹرویو کریں۔ اگر ایک مکان میں ایک سے زائد ایسے افراد ہیں جن کے 17 سال اور اس سے کم عمر کے بچے / بچیاں ہیں تو ہر والد / والدہ کے لیے علیحدہ سوالنامہ پُر کریں۔]**

F1. ضلع کوڈ | F2. تحصیل کوڈ | F3. سرکل کوڈ | F4. یونی کوڈ | F5. گاؤں کوڈ

| | | |
|---|---|---|
| H 10 | **[رضامندی برائے انٹرویو]** یہ سوالنامہ 17 سال اور اس سے کم عمر کے بچے / بچیوں کے متعلق ہے اور ہم آپ سے ان کی تعلیم کے متعلق کچھ سوالات کریں گے۔ کیا اب میں انٹرویو شروع کروں؟ | ہاں ..... 1<br>نہیں ..... 2 |
| H 11 | محکمہ مال کے مطابق موضع [گاؤں، کلی] | |
| H 12 | محلہ گلی / گاؤں کے حصے کا نام جہاں مکان واقع ہے | |
| H 13 | آپ کا نام کیا ہے؟ **[جواب دہندہ کا نام]** | |
| H 14 | بچے / بچی کے والد یا سرپرست کا نام **[جواب دہندہ ہونے کی صورت میں کوڈ 88]** | |
| H 15 | برائے مہربانی بچوں کے والد / سرپرست کا قومی شناختی کارڈ نمبر بتائیں؟ | شناختی کارڈ نمبر: - -<br>شناختی کارڈ نہیں بنا ..... 0000<br>شناختی کارڈ ملا نہیں ..... 0001<br>دیگر شہریت ..... 0003 |
| H 16 | کیا یہ آپ کا مستقل پتہ ہے؟ | ہاں ..... 1 [H19 سوال پوچھیں]<br>نہیں ..... 2 |
| H 17 | آپ کے گھر کا مستقل پتہ کیا ہے؟ | |
| H 18 | یہاں ہجرت کی وجہ | معاشی حالات کی وجہ سے ..... 01<br>بچے کی تعلیم کے لیے ..... 02<br>امن و امان کی صورتحال کی وجہ سے ..... 03<br>موسمی تبدیلی کی وجہ سے ..... 04<br>دیگر ..... 77 |
| H 19 | آپ کے کتنے بیٹے ہیں جن کی عمر 17 سال یا اس سے کم ہے؟ | |
| H 20 | آپ کی کتنی بیٹیاں ہیں جن کی عمر 17 سال یا اس سے کم ہے؟ | |
| H 21 | [سپروائزر کا نام و دستخط] | |
| H 22 | [انٹرویور کا نام و دستخط] | |
| H 23 | [انٹرویور کا پرسنل نمبر (کوڈ)] | |
| H 24 | [انٹرویو کی تاریخ] | سال ____ مہینہ ____ دن ____ |
| H 25 | [انٹرویو کا نتیجہ] | مکمل انٹرویو ..... 1<br>جزوی / انٹرویو سے انکار ..... 2 |
| H 26 | [جزوی یا انکار کی وجہ درج کریں] | |

**[دفتری استعمال کے لیے]**

| | | |
|---|---|---|
| H 27 | DE آپریٹر کا نام، کوڈ اور دستخط | |
| H 28 | DE کی تاریخ | سال ____ مہینہ ____ دن ____ |

## Form I - 17 فورمز اس سے کم عمر کے لیے سوالات

| | نام | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|
| | 11 | 10 | 9 | 8 | 7 | 6 | 5 | 4 | 3 | 2 | 1 |
| | ناسور بالغ یا نوجوان خواتین کے ساتھ کی **بالغ کے ساتھ کی گئی [9]** | [9] نام یا نوجوان؟ | [9] کیرکٹر سال ہے؟ **[کوئی نہیں ہے]** | [9] کوئی سال ہے **[9]** | [9] کوئی سال ہے | [9] کوئی سال ہے | [9] کوئی سال ہے | [9] کوئی سال ہے | [9] کوئی سال ہے | [9] کوئی سال ہے | [9] کوئی سال ہے |
| | **[کوئی نہیں لکھیں]** | 1-KP<br>2-ای | ایک سال سے کم کر کیلنڈر لکھیں<br>**[کوئی نہیں لکھیں]** | 1-ہاں<br>2-نہیں **[کوئی نہیں لکھیں]** | | 1-ہاں<br>2-نہیں<br>3-نہیں جانتا<br>4-کوئی نہیں<br>کہا گیا **[کوئی نہیں لکھیں]** | 1-ہاں<br>2-نہیں<br>3-نہیں جانتا<br>4-کوئی نہیں<br>کہا گیا **[کوئی نہیں لکھیں]** | 1-ہاں<br>2-نہیں<br>3-نہیں جانتا<br>4-کوئی نہیں<br>کہا گیا **[کوئی نہیں لکھیں]** | 1-ہاں<br>2-نہیں<br>3-نہیں جانتا<br>4-کوئی نہیں<br>کہا گیا **[کوئی نہیں لکھیں]** | 1-ہاں<br>2-نہیں<br>3-نہیں جانتا<br>4-کوئی نہیں<br>کہا گیا **[کوئی نہیں لکھیں]** | 1-ہاں<br>2-نہیں<br>3-نہیں جانتا<br>4-کوئی نہیں<br>کہا گیا **[کوئی نہیں لکھیں]** |
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کوڈ [KP] 01-شیر خوار خواتین 02-بچے کے ساتھ خواتین 04-ناسور بالغ یا نوجوان 05-نامعلوم

کوڈ [9] 01-مرد 02-عورت 03-لڑکا 04-لڑکی 05-نامعلوم 06-خواتین کی نقل و حرکت 07-خواتین کی نقل و حرکت 08-خواتین کی نقل و حرکت 09-خواتین کی نقل و حرکت 10-خواتین کی نقل و حرکت 11-نامعلوم 12-اسٹیل [کوئی نہیں لکھیں]

## Instructions to bidders

It would be deemed that by submitting a **proposal**, the bidder has:

- made a complete and careful examination of the RFP document and agrees to all conditions and implications that arise from it;
- sought, obtained and perused all relevant information for the submission of the proposal;

a. Any error or incomplete submission arising out of an interpretation of the RFP document, its annexures or any information passed on to the bidder by the E&SE Department, Government of Khyber Pakhtunkhwa or any of its officials, the E&SE Department shall not be liable and no request for redressal of grievance or reconsideration can be accommodated.

b. The E&SE Department, Government of Khyber Pakhtunkhwa reserves the right to annul the entire or part of the bidding process or to reject any or all proposals if:
   - at any time during the bidding process, any material misrepresentation is made or discovered;
   - the bidder does not respond to queries or requests for clarifications or requests for additional information; or
   - the bidder or their representatives or any person on their behalf attempts to influence the process of tender in any manner whatsoever

c. In case of rejection of one or more proposals after the opening of bids, and the bids belong to the highest evaluated bidder, the E&SE Department, Government of Khyber Pakhtunkhwa reserves the right to continue with the bid and invite the next highest evaluated bidder.

1. Any measure, taken to modify the bid process as mentioned above, will be at the sole discretion of the Government of Khyber Pakhtunkhwa Province represented by the E&SE Department, Khyber Pakhtunkhwa and is not negotiable.

## The Bidding Process

A **single stage two envelop** bidding process shall be followed. Bidders should examine all Instructions, Terms and Conditions as given in the RFP. Failure to furnish information required in the RFP or submission of Bids not substantially responsive or viable in every respect will be at the Bidder's risk and may result in rejection of the Bids. Bidders should strictly submit the Bid as specified in the RFP, failing which the Bids will be held as non-responsive and will be

rejected.

Bid shall comprise a single package containing two separate sealed envelopes i.e. Envelope-A: Technical Proposal and Envelope-B: Financial Proposal. Both the Envelopes A and B should be put in a single outer cover and sealed. The outer cover should be super scripted with "**Bid for Data Entry Services for Household Survey for Assessment of Out of School Children in Khyber Pakhtunkhwa**. The "FROM" and "TO" address shall also be written on all the envelopes. The Bids (Technical Proposal & Financial Proposal) shall be addressed to "Section Officer (General), Elementary & Secondary Education Department, Government of Khyber Pakhtunkhwa, Civil Secretariat, Block-A, Peshawar".

Note: The General Conditions of the contract contained in the Standard Bidding Documents for services (KPPRA) are to be followed when signing a contact with the successful bidder.

## Proposal submission

### 1. Technical Proposal

Technical proposal should be arranged in such a manner that Section one should contain legal documents relating to certificates of incorporation and registration with relevant federal/provincial tax authorities and section further divided into two sub-section as under:

**Experience of the Firm**

- Relevant Experience of Data entry services for large scale surveys with government/international development organizations (Max. 2 page with list of projects carried out and References)
- Specific Experience of data entry services carried out particularly in Khyber Pakhtunkhwa (Max. 2 pages with list of projects carried out and References)

**Approach and Methodology**

- Methodology with clear cut implementation plan/strategy against the ToRs (max. 2 pages)
- District level Data entry Centers establishment and Staffing plan (district-wise computer & equipment's and staffing- Data Editors, Data Entry Operators etc)
- Workplan and compliance strategy to meet the timelines for the assignment (max 2 pages)

## 2. Financial Proposal

The financial proposal will be comprising of the following:

a. Price proposal for the project
b. Detailed break up of prices for the Needs Analysis, design etc.

The financial proposal should be submitted for the whole project with a component wise breakup. The total price quoted for the project will be considered for comparison of quotes. Price quoted will be firm for the entire contract. All prices to be quoted in Pak-rupee, and must clearly state all applicable taxes which must be included in the quoted price.

The quoted price must include all taxes, installation/integration services and for delivery/implementation in the required locations.

**Note:-** E&SE Department, Government of Khyber Pakhtunkhwa will not allow any compensation to the approved bidders for variation in the rate of exchange of rupee against dollar or any other currency. All offers in this respect should be firm and final.

# Evaluation of Proposals

## EVALUATION METHODOLOGY

### i. Evaluation and Comparison of Technical and Financial Bids

The Contract will be awarded to the Bid most closely conforming to prescribed evaluation criteria and other conditions specified in the TORs.

### ii. Evaluation Criteria and Comparison of Bid

All Bidders shall meet legal and codal formalities of incorporation under governing law of Pakistan or Khyber Pakhtunkhwa and registration with federal/provincial tax authorities. All bid meeting responsiveness criteria shall be evaluated with 70% weight for technical bids and 30% for financial bids respectively.

### iii. Technical Evaluation

The Technical Bids shall be evaluated on the basis of following parameters with a minimum qualifying score of 60% in technical evaluation.

| S. No. | Description of Variable | Total Points |
|---|---|---|
| 1 | **Experience of the Firm** | **25** |
| 1.1 | Relevant Experience of Data entry services for large scale surveys with government/international development organizations (Minimum 5 year)<br>(Firms should provide max. 2 page list of projects carried out and references) | 15 |
| 1.2 | Specific Experience of data entry services carried out particularly in Khyber Pakhtunkhwa<br>(Firms should provide max. 2 page list of projects carried out with supporting references) | 10 |
| 2 | **Approach and Methodology** | **75** |
| 2.1 | Methodology with clear cut implementation plan/strategy against the ToRs (max. 2 pages) | 25 |
| 2.2 | District level Data entry Centers establishment and Staffing plan (district-wise computer & equipment's and staffing- Data Editors, Data Entry Operators etc) | 40 |
| 2.3 | Workplan and compliance strategy to meet the timelines for the assignment (max 2 pages) | 10 |
| **Total** | | **100** |

**iv. <u>Financial Evaluation</u>**

Only firms qualifying score 60% or above in technical evaluation will be invited for opening of financial proposals. Marks below 60% will be considered as disqualified and their financial proposals will be returned without opening.

Financial bids of The Technically qualified Firms will be opened before the representatives who wish to attend the tender opening. 30% weight-age will be given to Financial Proposals of the Firms. The formula for financial scoring is that the lowest bidder gets 30 points and for the other bidders (Quoted bid of the bidder, Divided by lowest bid, multiplied by 30).

Value quoted by lowest bidder = A

Value quoted by second lowest bidder = B

Value quoted by third lowest bidder = C

Financial scoring of the lowest bidder will be = 30

Financial scoring of the second lowest bidder will be= (A/B)*30

Financial scoring of the third lowest bidder will be = (A/C)*30

v. **Total Score and award of contract**

(70% of Technical Score + 30% Financial Score) = Total Score

Points obtained in the detailed technical evaluation will be carried forward & prorated. Contract will be awarded to the Firm with maximum accumulative score (Technical Score + Financial Score).

# SECTION – II

## Technical Proposal - Standard Forms

FORM TECH-1. TECHNICAL PROPOSAL SUBMISSION FORM

[*Location, Date]*

To: *[Name and address of PE* ]

Dear Sirs:

We, the undersigned, offer to provide the consulting services for *[Insert title of assignment]* in accordance with your Request for Proposal dated *[Insert Date]* and our Proposal. We are hereby submitting our Proposal, which includes this Technical Proposal, and a Financial Proposal sealed under a separate envelope

We are submitting our Proposal in association with: *[Insert a list with full name and address of each associated Consultant]*

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 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 Contract negotiations.

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

# For FTP Only

## Form TECH-2. Consultant's Organization and Experience

### *A - Consultant's Organization*

*[Provide here a brief (two Pages) description of the background and organization of your firm/entity and each associate for this assignment.*]

## B - Consultant's Experience

[Using the format below, provide information on each assignment for which your firm, and each associate for this assignment, was legally contracted either individually or as a corporate entity or as one of the major companies within an association, for carrying out consulting services similar to the ones requested under this assignment]

| | |
|---|---|
| *Assignment name:* | *Approx. value of the contract (in current US$ or Euro):* |
| *Country:*<br>*Location within country:* | *Duration of assignment (months):* |
| *Name of PE:* | *Total No of staff-months of the assignment:* |
| *Address:* | *Approx. value of the services provided by your firm under the contract (in current US$ or Euro):* |
| *Start date (month/year): Completion date (month/year):* | *No of professional staff-months provided by associated Consultants:* |
| *Name of associated Consultants, if any:* | *Name of senior professional staff of your firm involved and functions Performed (indicate most significant profiles such as Project Director/Coordinator, Team Leader):* |
| *Narrative description of Project:* | |
| *Description of actual services provided by your staff within the assignment:* | |

# Form TECH-3. Comments and Suggestions on the Terms of Reference and on Counterpart Staff and Facilities to be Provided by the PE

## *A - On the Terms of Reference*

*[Present and justify here any modifications or improvement to the Terms of Reference you are proposing to improve Performance in carrying out the assignment (such as deleting some activity you consider unnecessary, or adding another, or proposing a different phasing of the activities). Such suggestions should be concise and to the point, and incorporated in your Proposal.* ]

## *B - On Counterpart Staff and Facilities*

[Comment here on counterpart staff and facilities to be provided by the PE according to Paragraph Reference 1.4 of the Data Sheet including: administrative support, office space, local transportation, equipment, data, etc.]

# Form TECH-4. Description of Approach, Methodology and Work Plan for Performing the Assignment

(For small or very simple assignments the PE should omit the following text in Italic)

[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 three chapters:

*a)* Technical Approach and Methodology, (2 Pages)

*b)* Work Plan (2 Pages), and

*c)* Organization and Staffing, (2 Pages)

*a)* Technical Approach and Methodology. In this chapter you should explain your understanding of the objectives of the assignment, approach to the services, methodology for carrying out the activities and obtaining the exacted output, and the degree of detail of such output. You should highlight the problems being addressed and their importance, and explain the technical approach you would adopt to address them. You should also explain the methodologies you propose to adopt and highlight the compatibility of those methodologies with the proposed approach.

*b)* Work Plan. In this chapter you should propose the main activities of the assignment, their content and duration, phasing and interrelations, milestones (including interim approvals by the PE), and delivery dates of the reports. The proposed work plan should be consistent with the technical approach and methodology, showing understanding of the TOR and ability to translate them into a feasible working plan. A list of the final documents, including reports, drawings, and tables to be delivered as final output, should be included here. The work plan should be consistent with the Work Schedule of Form TECH-8.

*c)* Organization and Staffing. In this chapter you should propose the structure and composition of your team. You should list the main disciplines of the assignment, the key expert responsible, and proposed technical and support staff.

FORM TECH-5. TEAM COMPOSITION AND TASK ASSIGNMENTS

| Professional Staff | | | | |
|---|---|---|---|---|
| Name of Staff | Firm | Area of Expertise | Position Assigned | Task Assigned |
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## FORM TECH-6. 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**:** _____
5. Nationality**:** _____
6. *Education* [Indicate college/university and other specialized education of staff member, giving names of institutions, degrees obtained, and dates of obtainment]**:** _____
7. Membership of Professional Associations**:**
8. *Other Training* [Indicate significant training since degrees under 5 - Education were obtained]**:**
9. *Countries of Work Experience***:** [List countries where staff has worked in the last ten years]**:**
10. *Languages* [For each language indicate proficiency: good, fair, or poor in speaking, reading, and writing]*:*

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

From *[Year]:* ____ To [Year]:
Employer: ___
Positions held: _____

| 11. Detailed Tasks Assigned<br><br>*[List all tasks to be Performed under this assignment]* | 12. Work Undertaken that Best Illustrates Capability to Handle the Tasks Assigned<br><br>*[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.]*<br><br>Name of assignment or project:<br>Year:<br>Location:<br>PE: |
|---|---|
| | Main project features:<br>Positions held: |
| | Activities Performed: |

13. Certification:

I, the undersigned, certify that to the best of my knowledge and belief, this CV correctly describes me, 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 7. Staff

| No | | Name of Staff | 2 Staff input (in the form of a bar chart) | | | | | | | | | | | | | Total staff-month input | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | | **1** | **2** | **3** | **4** | **5** | **6** | **7** | **8** | **9** | **10** | **11** | **12** | **n** | **Home Field[3]** | **Total** |
| FOREIGN | | | | | | | | | | | | | | | | | |
| **1** | | | *[Home* | | | | | | | | | | | | | | |
| | | | *[Field* | | | | | | | | | | | | | | |
| **2** | | | | | | | | | | | | | | | | | |
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| **1** | | | [Home] | | | | | | | | | | | | | | |
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| **2** | | | | | | | | | | | | | | | | | |
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| | | | | | | | | | | | | **Total** | | | | | |

1. **For Professional Staff the input should be indicated individually; for Support Staff it should be indicated by category (e.g.: draftsmen, clerical staff, etc.).**
2. **Months are counted from the start of the assignment. For each staff indicate separately staff input for home and field work.**
3. **Field work means work carried out at a place other than the Consultant's home office.**

**Full time input** **Part time input**

**Form Tech 8. Work Schedule**

| No | Activity | 2 | | | | | | | | | | | | |
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| | | i | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | n |
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**1 Indicate all main activities of the assignment, including delivery of reports (e.g.: inception, interim, and final reports), and other benchmarks such as PE approvals. For phased assignments indicate activities, delivery of reports, and benchmarks separately for each phase.**