



## Trust for Democratic Education and Accountability (TDEA)

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### Request for Proposals (RFP)

<b>RFP Number:</b>	RFP – No. 0143
<b>Description:</b>	Project Management Policy Design and Implementation
<b>Release Date:</b>	October 24, 2017
<b>Deadline for Questions:</b>	November 05, 2017 – 1700 hrs
<b>Due Date:</b>	November 08, 2017, 1700 hrs Pakistan Standard Time
<b>Contracting Entity:</b>	Trust for Democratic Education and Accountability (TDEA)
<b>Funded by:</b>	TDEA
<b>Place of Performance:</b>	TDEA Secretariat, Islamabad, Pakistan.

Trust for Democratic Education and Accountability (TDEA) is seeking proposals from reputed Consultants/ Firms. The offeror is required to study the operating model of TDEA and develop a manual covering the best practices of project management using applicable areas of PMBOK Version 5 for development sector initiatives. A comprehensive policy and procedures manual including management aspects of projects, programs, oversight mechanisms and tools will be required. A follow-on training will also be required for a group of up to 25 professional staff on the manual as a part of roll out plan.

The purpose of this RFP is to disseminate information to prospective bidders so that they may develop and submit proposals for the description of work defined in the Section – 2 titled “**Statement of Work**” of this RFP.

The successful bidder will be responsible for ensuring achievement of the assigned objectives described in Section – 2 of this RFP. TDEA intends to provide the cost for the activities outlined in the Section – 2 of this RFP.

Proposals must be directly responsive to the terms and conditions of this RFP. Eligible Consultants/Firms interested in submitting a proposal must read this RFP thoroughly to understand the type of activities sought and the proposal submission requirements and the evaluation criteria. The complete downloading, receipt and follow-up for any amendments of this RFP remain the responsibility of the bidder. TDEA is not liable for any technological or data related issues and will not be responsible for communicating changes to this solicitation on an individual basis.

To be considered for the award, the bidder must provide all required information in its proposal and subsequent amendments to it, if any.

TDEA reserves the right to award any or none of the proposals submitted with or without giving any reasons. TDEA also reserves the right to make any final decisions with respect to this solicitation and intends to award the proposal(s) which meet the criteria laid down in the RFP are deemed as most-advantageous for project objectives and provide(s) the best value for money. Issuance of this RFP does not constitute an award commitment on the part of the TDEA, nor does it commit the TDEA to pay for costs incurred in the



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preparation and submission of a proposal. In addition, award of the agreement contemplated by this RFP cannot be made until funds have been appropriated, allocated and committed through internal TDEA procedures.

While TDEA anticipates that these procedures will be successfully completed, potential bidders are hereby notified of these requirements and conditions for the award. No costs chargeable to the proposed Contract may be incurred before receipt of a fully executed Contract.

In the event of an inconsistency between the documents comprising this RFP, it shall be resolved at the discretion of the Chief Executive Officer (CEO). It is the responsibility of the recipient of this RFP document to ensure that it has been downloaded in its entirety from the email/website and the proposal is filled correctly/completely. TDEA bears no responsibility for data errors resulting from transmission or conversion processes. Bidders are encouraged to submit offers before the closing date and time indicated in the RFP document.

All guidance included in this RFP takes precedence over any reference documents referred to in the RFP. Bidders must retain a copy of their offer and accompanying enclosures for their records.

By submitting proposal under this RFP, the bidder certifies that all the information contained in the technical and cost proposals, their attachments and all supporting documentation provided with the proposal or subsequently during rounds of clarifications to the time an award is made are correct to the best of his/her knowledge and belief. Any misrepresentation or falsification will result in rejection of the offer. This requirement will survive the solicitation phase and even after the award of contract, if it is discovered that information provided was misrepresented or falsified or even invalid, TDEA may terminate the contract for default by the Consultancy Firms without any damages to be paid.

Prospective bidders who have questions concerning the contents of this RFP shall submit them in writing no later than date mentioned above by an email **ONLY** at [Imraan.ashraf@tdea.pk](mailto:Imraan.ashraf@tdea.pk). The answers to questions will be uploaded on TDEA website. No questions will be answered over the telephone or after deadline for questions mentioned in the start of this RFP. TDEA has developed processes for open and clear communications with the staff through email and remains committed to maintaining integrity of the process and while ensuring responsiveness and accountability from within the project. Bidders are also required to appreciate and respect the integrity of the process and support TDEA with this objective. Therefore, any efforts for directly contacting the project staff and going outside the defined processes for any information which is otherwise made available by TDEA through pre-defined regular means may be construed as influencing the process and breach of integrity which may have negative impact on the proposal.

Late or incomplete applications will not be considered for award. Only sealed envelope by hand delivery or by courier delivery is acceptable. Telegraphic transmission, soft copy through surface email or fax applications (entire proposal) is not authorized for this RFP and will not be accepted. Once again, bidders are encouraged to submit proposals much before the end date.

### **Contents of RFP:**

Section – 1: Instructions to Offerors

Section – 2: Description/Specifications/Statement of Work

Section – 3: Eligibility and Selection Criteria.

Section – 4: Contractual Requirements and Other Terms

Attachment A: Letter of Transmittal

Attachment B: Required Certifications



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## **SECTION 1: INSTRUCTIONS TO OFFERORS**

### **1. Introduction**

The Trust for Democratic Education and Accountability (TDEA) is a nonprofit organization, ensuring parliamentary and governance oversight, political, elections observation and electoral reforms in Pakistan since 2008. TDEA is promoting democracy and bridging gap between citizens and elected representatives through field work, applied research, advocacy, election observation, governance monitoring, electoral reforms, oversight of legislatures and access to quality education. Moreover, TDEA strives to strengthen public accountabilities by enhancing capability of citizens' associations for the promotion of civil liberty, peace, improved governance and democracy in Pakistan.

The overall objective of TDEA is to educate people and civil societies about their democratic rights, responsibilities, and the significance of engaging in all forms of democratic processes for strengthening democratic governance and to engage them in carrying out democratic accountability.

TDEA manages projects of varying size and scale. The execution methodologies also vary from direct implementation to working through partners. TDEA's portfolio contains both projects and programs.

### **2. Purpose and Objective**

The Purpose of this RFP is to obtain services of reputed Consultants/Firms for Project Management Policy Design and Implementation for TDEA. This solicitation requires proposal for the delivery of tools and services as detailed in the Section – 2 of this RFP.

### **3. Services and Payment**

Payment for services under this Contract shall be processed upon approval of all deliverables; submission of appropriate documentation and invoice for services duly approved by TDEA.

### **4. Requirements for the Consultants/ Firms**

The Consultants/ Firms must possess the following skills/expertise:

- Have experience of conducting similar assignments involving organizations of varying sizes and outlook.
- Have knowledge of the Project/Program Management policies, PMBOK Version 5 for model and comparative purposes.
- Preferably have designed policies for not-for-profit organizations.

### **5. Proposal Information**

The technical proposals are required to be in English language and not more than 5-7 pages of A-4 size each for the statement of work provided in Section – 2 of this RFP. The technical proposal must include; previous relevant experience, Consultants/Firms' capacity, and proposed plan to undertake the enlisted activities and budget.

### **6. Deadline & Protocol for Submission of Offers**

All offers must be "received" by post or by hand no later than **November 08, 2017 by 1700 hrs Pakistan Standard Time**. Late offers will not be considered for award.

**Main sealed envelop contains two inner sealed envelops; Two inner envelops** shall indicate the name and address of the bidder as well as the type of proposal. First inner sealed envelope shall contain **Technical**



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**Proposal** along with updated CV(s)/ profile and relevant documents while the second inner sealed envelope shall include the **Financial Proposal** thereof. The main envelope should clearly state:

**"RFP - No.0143"**

**And should be addressed to:**

**Procurement Specialist**

**TDEA-FAFEN**

**Building No.1, Street 5 (Off Jasmine Road),**

**G-7/2, Islamabad**

### **7. Award Decision**

TDEA may award a contract resulting from this RFP to the responsible bidder(s) whose proposal(s) conforming to this RFP offers the greatest value (see Section 3 of this RFP). TDEA may (a) reject any or all proposals, (b) accept other than the lowest cost proposal, (c) accept more than one proposal, (d) accept alternate proposals, (e) accept part of the proposal instead of whole and (f) waive informalities and minor irregularities in proposals received.

TDEA may award a contract on the basis of initial proposals received, without discussions or negotiations. Therefore, each initial offer should contain the bidder's best terms from a cost and technical standpoint. As part of its evaluation process, however, TDEA may select to discuss technical, cost or other pre-award issues with one or more bidders. Alternatively, TDEA may proceed with award selection based on its evaluation of initial proposals received and/or commence negotiations solely with one bidder.

Awards will be made to responsible bidders whose proposal offer the greatest value, technical, cost and other factors considered. Please note that until an executed contract is received by you, which is duly signed off by the Chief Executive Officer of TDEA, no expenditures will be paid by TDEA.

A written award/ contract mailed or otherwise furnished to the successful bidder(s) within the time for acceptance specified either in the proposal(s) or in this RFP (whichever is later) shall result in a binding agreement without further action by either party. Before the proposal's specified expiration time, if any, TDEA may accept a proposal, whether or not there are negotiations after its receipt, unless a written notice of withdrawal is received before award. Negotiations or discussions conducted after receipt of a proposal do not constitute a rejection or counteroffer by TDEA. Since the funding allocation is limited and defined, TDEA may only award to the bidders deemed as "the best" for the program objectives while not awarding a contract to any otherwise qualified proposals.

**(End of Section – 1)**



## **SECTION 2: DESCRIPTION/SPECIFICATIONS/STATEMENT OF WORK**

### **1. Scope of Work**

The offeror is required to study the operating model of TDEA and develop a manual covering the best practices of project management using applicable areas of PMBOK Version 5 for development sector initiatives. A comprehensive policy and procedures manual including management aspects of projects, programs, oversight mechanisms and tools will be required. A follow-on training will also be required for a group of up to 25 professional staff on the manual as a part of roll out plan.

### **2. Period of Performance**

The period of performance will be from November 14, 2017 to December 26, 2017.

### **3. Place of Performance**

The offerors will be required to work at, around TDEA head office at Islamabad.

### **4. ASSIGNMENT WORK REQUIREMENTS**

As part of the assignment the offeror will be responsible for performing tasks throughout its various stages. The following is an indicative list of these tasks which will result in the successful completion of this assignment:

#### *Kickoff:*

- Offeror will create and present detailed assignment plan including schedule, WBS, requirement analysis plan including required documentation, implementation plan and training plan
- Offeror will present assignment plan (including its checklist) to TDEA for review and approval

#### *Requirement Analysis Phase:*

- Work with TDEA to gather requirements and establish metrics
- Study the existing project management practices and policies
- Study the ICT based management systems for management, monitoring and oversight of projects
- Prepare a requirement analysis including options for basic, moderate and advance level systems of project management, including cost analysis for TDEA's review and approval.
- Present written status at weekly meeting.

#### *Design Phase:*

- Draft project management policy and procedures manual based on approved requirement analysis
- Develop tools, including modification of existing tools.
- Develop mechanisms and tools for project oversight at project, program and executive levels, also in context of priority and risk management.
- Cover the initiation, planning, execution, monitoring and control and close out aspects for current and future TDEA projects. Also cover the knowledge areas as per PMBOK Version 5.
- Design tools for each phase covering each knowledge area. Review the existing tools for modification with a view to make changes in the existing systems only where absolutely necessary.
- Offeror will provide a detailed implementation plan commensurate with the needs of TDEA with options of phased implementation of the new system, as appropriate.
- Discuss the plan with TDEA and clarify any questions for implementation.
- Present written status at weekly meeting.

#### *Training Phase:*

- Offeror will impart class room training to upto 25 staff of TDEA and issue certificates of completion of training.
- Present written status at weekly meeting



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### *Assignment Close-out:*

- Offeror will provide TDEA with all documentation in accordance with the approved assignment plan
- Offeror will present assignment close-out report to TDEA for review and approval
- Offeror will complete the “assignment work requirements checklist” showing that all assignment tasks have been completed
- Present written status at weekly meeting

### **5. Schedule/Milestones**

Following is the indicative schedule for “Project Management Policy Design and Implementation” assignment:

Period of Performance Begins	November 14, 2017
Design Review	November 24, 2017
Implementation Review	December 08, 2017
Implementation Complete	December 16, 2017
Training Complete	December 20, 2017
Assignment Completion Review	December 23, 2017
Assignment Closeout Complete	December 26, 2017

The below list consists of the initial milestones identified for the assignment:

1. Organizational policy for oversight and risk management
2. Project/program management manual
3. Live tools e.g. templates for reporting and analysis
4. Staff training and Implementation of the new policy and procedures

Subsequent to the assignment, TDEA will initially roll out the policy manual with first six months as implementation trial period. During this period, TDEA will test the new system followed by review, finalization and periodic updates.

### **6. Acceptance Criteria**

For the assignment, the acceptance of all deliverables will reside with the Chief Executive Officer, TDEA (CEO/TDEA). The CEO/TDEA will maintain a small team of three advisors in order to ensure the completeness of each stage of the assignment and that the scope of work has been met. Once a phase of this assignment is completed and the Offeror provides their report/presentation for review and approval, the CEO/TDEA will either sign off on the approval for the next phase to begin, or reply to the Offeror, in writing, advising what tasks must still be accomplished.

Once all assignment tasks have been completed, the assignment will enter the closeout stage. During this stage of the assignment, the Offeror will provide their closeout report and assignment work requirements checklist to CEO/TDEA. The acceptance of this documentation by CEO/TDEA will acknowledge acceptance of all assignment deliverables and that the Offeror has met all assigned tasks.

TDEA reserves the right and is the final authority for acceptance of deliverables. CEO/TDEA’s decision will be binding on both parties in the event of any discrepancies involving completion of assignment tasks or disagreement between TDEA and the chosen Offeror.



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### **7. Other Requirements**

Confidentiality, conflict of interest, intellectual property and other terms for procurement of services by TDEA are applicable if not already covered by this document.

**(End of Section – 2)**



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## **SECTION 3: ELIGIBILITY AND SELECTION CRITERIA**

### **1. Eligibility Criteria**

This is an open competition.

### **2. Selection Criteria and Distribution of Marks**

For this RFP, 'Single stage - Two Envelope Procedure for open competitive bidding shall be adopted. This procedure requires the evaluation of technical proposal being completed prior to any financial proposal being opened and compared. The financial proposals will be opened only for submissions that passed the minimum technical score of 70% of the obtainable score of 60 marks in the evaluation of technical proposal (i.e. 42 marks). The technical proposal will be evaluated on the basis of its responsiveness to section 2 of this RFP. Time efficiency as well as realistic demonstration of understanding of the work will also be considered.

In the second stage, the financial proposal of all bidders who have attained minimum 70% score in the technical evaluation will be reviewed and awarded points according to price quoted. The Offeror/Offerors with the highest overall score i.e. the sum of the Technical Proposal (max. 60 marks) and the Price Proposal (max. 40 marks) may be proposed for award. This is a way of structuring the decision and shall not overrule the best value or interest based decisions. A tabular presentation of marks allocation is provided below:

	<b>Criteria for technical evaluation</b>	<b>Marks allocation</b>
1	Relevant previous experience	15
2	Details of the Team proposed to be deployed to work with the TDEA, with qualifications and experience of the team members must be provided.	15
3	Methodology and plan of assignment	30
Total Marks assigned to technical proposal		<b>60</b>
Total Marks assigned to financial proposal		40
<b>Cumulative total for bid evaluation</b>		<b>100</b>

TDEA reserves the right to reduce this ceiling or the qualifying marks' percentage with or without giving any information to the bidders. Only short listed bidders will be contacted.

### **3. Clarification of proposals**

In order to assist in the examination, evaluation and comparison of Proposals, TDEA may at its discretion, ask the Offeror for clarification of its Proposal in any form deemed appropriate including presentations by the proponent. The request for clarification and the response shall be in writing and no change in price or substance of the Proposal shall be sought, offered or permitted.

### **4. Best/ Greatest Value Decision**

Award will be made to the Applicant whose application offers the best value to TDEA. Best value is defined as the expected outcome of a process that, in TDEA's estimation, provides the greatest overall benefit in response to the requirement.

For this RFP, technical proposal merits are considered significantly more important than cost relative to deciding which bidder might perform the work best. Cost realism, effectiveness and reasonableness will be the determining factors in the event that the proposals receiving the highest ratings are closely ranked. Therefore, after the final evaluation of the proposal, TDEA will make the award to the bidder whose proposal offers the best value to the project considering technical, cost and other factors.

Other areas of review and discussion will vary according to the circumstances pertaining to the proposal. TDEA will acknowledge the receipt of proposals on TDEA's behalf.





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(End of Section – 3)



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## **SECTION 4: CONTRACTUAL REQUIREMENTS AND OTHER TERMS**

### **CONTRACTUAL REQUIREMENTS**

#### **1. Required Qualifications**

The Consultants/Firms must have the related field experience.

#### **2. Confidential and privacy requirements**

The Consultants/Firms (hereinafter referred to as “Consultancy Firms”) shall be solely responsible for complying with Privacy Act requirements governing any personal financial information provided by TDEA and its implementing partners. The Consultancy Firms will treat all documentation requested by any party as “Confidential” and will not discuss any analysis or estimate or detail with anyone without the express permission of TDEA.

### **Other Terms and Conditions**

#### **1. Validity Period**

Offers must remain valid for 60 calendar days after the offer deadline. TDEA might, after lapse of 60 days, reconfirm the offers keeping in view the processing time involved at TDEA.

#### **2. Negotiations**

Best offer proposals are requested. It is anticipated that awards will be made solely on the basis of these original proposals. However, TDEA reserves the right to conduct negotiations and/or request clarifications prior to awarding a subcontract. TDEA reserves the right to make multiple awards, if it is in the best interest of TDEA.

#### **3. Terms and Conditions of Subcontract**

Issuance of this solicitation does not in any way obligate TDEA or its donor agency to award a subcontract, nor does it commit TDEA or its donor agency to pay for costs incurred in the preparation and submission of a proposal.

This solicitation is subject to the Fixed Price Subcontract Terms and Conditions detailed in Section 4. Any resultant award will be governed by these terms and conditions. TDEA reserves the right to make revisions to the content, order, and numbering of the provisions in the actual subcontract document prior to execution by TDEA and the selected awardee.

Please note that in submitting a response to this solicitation, the offeror understands that TDEA is not a party to this solicitation and the offeror agrees that any protest hereunder must be presented—in writing with full explanations—to TDEA for consideration, TDEA, at its sole discretion, will make a final decision on the protest for this procurement.

#### **4 Confidentiality**

The Consultants/Firms recognizes that, in performing this proposed contract, the Consultants/Firms may obtain access to non-public information that is confidential or proprietary in nature. Except as permitted by the contract, the Consultant/Firms agrees that he will not disclose to any third party, or otherwise use, any information it obtains or prepares in the course of performance of this agreement for any purpose other than to perform work under the contract without first receiving written permission from CEO for TDEA.

#### **6 Cooperating with Other Organizations**

The Consultant/Firms agrees to cooperate with representatives of Regional Inspector General/Pakistan, other offices, Government of Pakistan’s offices, Federal agencies, governmental entities, and other organizations as may be required by TDEA.

#### **7. Conflicts of Interest**

The Consultant/Firms will ensure compliance with TDEA’s policies and directives on conflict of interest and other related pronouncements. TDEA HAS NOT WAIVED any potential conflicts of interest as defined by TDEA.

**(End of Section – 4)**



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### **ATTACHMENT A: LETTER OF TRANSMITTAL**

*The following letter must be completed and submitted with any offer:*

To: TDEA-FAFEN  
Attention: Procurement Department

Reference: RFP No. 0143

Date: (insert date)

(Insert name of Individual / Organization) hereby proposes the attached offer to perform all work required as described in the above referenced RFP. Please find attached our detailed Technical Proposal (including relevant past performance information, profiles of the Consultancy Firms, and required certifications and other material, as called for in the RFP.

We hereby acknowledge and agree to all of the terms and conditions, special provisions, and instructions included in the above referenced RFP. We further certify that (insert name of Individual / Organization), as a *Consulting Firm* and all commodities and services offered in response to this RFP—are eligible to participate in this procurement under the terms and conditions of this solicitation and under TDEA regulations.

We hereby certify that the enclosed relevant experience, certifications, and other statements are accurate, current, and complete.

\_\_\_\_\_  
Name of the Individual

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date



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### **ATTACHMENT B: CERTIFICATE OF INDEPENDENT PRICE DETERMINATION**

\_\_\_\_\_ (Hereinafter called the "offeror")  
(Insert name of Individual or Organization)

(a) The offeror certifies that—

(1) The prices in this offer have been arrived at independently, without, for the purpose of restricting competition, any consultation, communication, or agreement with any other offeror or competitor relating to—

- (i) Those prices;
- (ii) The intention to submit an offer; or
- (iii) The methods or factors used to calculate the prices offered.

(2) The prices in this offer have not been and will not be knowingly disclosed by the offeror, directly or indirectly, to any other offeror or competitor before bid opening (in the case of a sealed bid solicitation) or contract award (in the case of a negotiated solicitation) unless otherwise required by law; and

(3) (A) No attempt has been made or will be made by the offeror to induce any other concern to submit or not to submit an offer for the purpose of restricting competition.

(b) Each signature on the offer is considered to be a certification by the signatory that the signatory—

(1) Is the person is responsible for determining the prices being offered in this bid or proposal, and that the signatory has not participated and will not participate in any action contrary to paragraphs (a)(1) through (a)(3) of this provision;

(4) If the offeror deletes or modifies paragraph (a) (2) of this provision, the offeror must furnish with its offer a signed statement setting forth in detail the circumstances of the disclosure.

BY (Signature) \_\_\_\_\_ TITLE \_\_\_\_\_

TYPED NAME \_\_\_\_\_ DATE \_\_\_\_\_