



EMPLOYEES' OLD-AGE BENEFITS INSTITUTION

HEAD OFFICE, G.P.O. BUILDING

I.I. CHUNDRIGAR ROAD, KARCHI

REQUEST FOR PROPOSAL FOR HUMAN RESOURCE CONSULTANCY SERVICES

A. INVITATION TO BID

The Employees Old-Age Benefits Institution (“**EOBI**”) is seeking Proposals from reputed Human Resource Management Consultants, firms and organizations in order to engage an experienced and professional consultant (“**HRM Consultant**”) to create a functioning human resource management system at all levels of administration within EOBI and to manage staff expectations and concerns during the consultancy period.

B. SCOPE OF WORK

1. Designing the advertisement inviting applications for recruitment against all vacant posts of EOBI and getting it published in leading national newspaper(s) and regional newspaper(s) in consultation with EOBI.
2. Developing a standard application form in consultation with EOBI and making such forms available at selected places/offices and on EOBI's website.
3. CVs screening and identifying, sourcing and selecting candidates eligible to undertake written evaluation tests from the pool of applicants against advertised posts.
(Annexure A)
4. Development of written evaluation tests for selection of candidates seeking employment within EOBI, and seeking approval of the competent authority within EOBI upon the content of such evaluation tests.
5. Administering/Conducting the written tests and examinations at all such centers as designated to be examination centers by EOBI, and their evaluation.
6. Preparation of comprehensive merit list of all candidates qualified for interview after evaluation of all written exams.
7. Dispatching interview call letters to the candidates out of the merit lists approved by the competent authority of EOBI.
8. Developing criteria to be used by EOBI's interview panel to assess and evaluate the candidates shortlisted for interviews.
9. Preparing final comprehensive merit list for all candidates after updating the initial lists with the marks scored in the interviews.

C. INSTRUCTIONS TO BIDDERS

1. PREPARATION OF PROPOSALS

Proposals should be submitted in two separate envelopes namely, "Technical Proposal" and "Financial Proposal" in the manner stipulated below.

In preparing their Proposals, the prospective HRM Consultants are expected to examine in detail the documents comprising this Request for Proposal ("RFP"). Material deficiencies in providing the information requested may result in rejection of the Proposal.

While preparing the Technical Proposal, the prospective HRM Consultants must give particular attention to the following:

- i. If an applicant consultant/firm considers that it may enhance its expertise for the assignment by associating with other consultant/firm(s) by way of a joint venture or sub-consultancy, it may so associate with other consultant/firm(s);
- ii. The applicant consultant/firm must first obtain EOBI's approval prior to entering into a joint venture agreement with another consultant/firm(s);
- iii. After entering into the joint venture agreement, all partners shall be jointly and severally liable and shall indicate in the joint venture agreement who will act as the leader of the joint venture;
- iv. Alternative professional staff shall not be proposed, and only one curriculum vita (CV) may be submitted for each position.

2. LANGUAGE

The Proposal, as well as all related correspondence exchanged by the prospective HRM Consultants and EOBI, shall be written in the English language.

3. TECHNICAL PROPOSAL FORMAT AND CONTENT

The Data Sheet (*refer to Section A of this RFP*) indicates the format of the Technical Proposal to be submitted. Submission of the erroneous type of Technical Proposal will result in the Proposal being deemed non-responsive. The Technical Proposal shall be used to provide the information indicated in the sub-paragraphs (i) to (v) given below, using the Standard Forms in Section A.

- i. A brief description of the applicant consultant/firm's organization and an outline of recent experience of the applicant consultant/firm and, in the case of joint venture, for each partner, description of assignments of a

similar nature is required in **Form TECH-2** below. For each assignment, the outline should indicate the names of Sub-Consultant/Firms/Professional staff who participated, duration of the assignment, contract amount, and applicant consultant/firm's involvement. Assignments completed by individual professional staff working privately or through other consulting firms cannot be claimed as the experience of the applicant consultant/firm, or that of the applicant consultant/firm's associates, but can be claimed by the professional staff themselves in their CVs. The applicant consultant/firm must substantiate the claimed experience.

- ii. 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**.
- iii. 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**).
- iv. CVs of the professional staff signed by the staff themselves or by the authorized representative of the professional staff (**Form TECH-5**).
- v. A detailed description of the proposed methodology and staffing.

The Technical Proposal shall not include any financial information. A Technical Proposal containing financial information may be declared non responsive.

4. **FINANCIAL PROPOSALS**

The Financial Proposal shall be prepared using the attached Standard Forms in Section B below. It shall be in the form of a lump sum amount listing all costs associated with the assignment.

5. **SUBMISSION, RECEIPT AND OPENING OF PROPOSALS**

Submission letters for both Technical and Financial Proposals should be in the format of **Form TECH-1** in Section A, and **Section B FIN-1**, respectively.

An authorized representative of the applicant consultant/firm(s) shall mark with his/her initials all pages of the original Technical and Financial Proposals. The authorization shall be in the form of a registered power of attorney accompanying the Proposal or in any other form demonstrating that the representative has been fully authorized to sign. The signed Technical and Financial Proposals shall be marked "Original".

The Technical Proposal shall be marked “Original” or “Copy” as appropriate. The Technical Proposals shall be sent to the addresses mentioned on the Data Sheet and in the number of copies indicated in the Data Sheet. If there are discrepancies between the original and the copies of the Technical Proposal, the original shall prevail.

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 (if required under the selection method indicated in the Data Sheet) 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” printed on the face of the envelope. The envelopes containing the Technical and Financial Proposals shall be placed into a single outer envelope and sealed. This outer envelope shall bear the Firm's address and title of the assignment, and be clearly marked “Do Not Open, Except In Presence Of The competent forum [*insert the time and date of the submission deadline indicated in the Data Sheet*]”.

EOBI shall not be responsible for misplacement, loss or premature opening, if the outer envelope is not sealed and/or marked as indicated. This violation of the condition may cause 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.

The Proposals must be sent to the address/addresses indicated in the Data Sheet and received by EOBI with in the stipulated time period and the date indicated in the Data Sheet, or any extended deadline stipulated and publicised thereafter. Any proposal received by EOBI after the deadline for submission shall be returned unopened.

i. **Technical Proposal**

In preparing the Technical Proposal, the applicant is expected to delineate the individual/firm/organization profile including:

1. Details of experience;
2. Areas of expertise;
3. Profiles of key personnel (in case of firm/organization);
4. Financial Strength; and
5. Infrastructure.

Failure to provide all requested information shall be at the applicant's own risk and may result in rejection of proposal.

The applicants are expected to submit all relevant information over and above the documents mentioned herein, that they deem relevant to the services covered in the Scope of Work.

Educational and professional qualifications and skill-set of key personnel should include:

1. A Masters or PhD in relevant disciplines;
2. At least five (05) years professional experience dealing with team and organization building, preferably in the public sector;
3. A knowledge of modern Human Resources Development techniques and an understanding of organizational theory, behavior and practices with regard to the public sector;
4. Ability to mentor staff and facilitate learning by doing; and
5. Exhibition of project management skills in previous jobs.

ii. ***Financial Proposal***

The Financial Proposal will include the bid price quoted for all Services. (Refer to **Section – B FIN-1: Financial Proposal – Standard Forms**).

6. **PROPOSAL EVALUATION**

At no stage, the applicant consultant/firm(s) shall contact EOBI on any matter related to its Technical and/or Financial Proposal. Any effort by applicant consultant/firm(s) to influence EOBI in the examination, evaluation, ranking of Proposals, and recommendation for award of Contract may result in the rejection of such consultant/firm's Proposal.

The Proposal Evaluation Committee appointed by the Chairman EOBI will carry out the evaluation of proposals on the basis of their responsiveness technical score. A Proposal considered unsuitable shall be rejected at this stage if it does not respond to important aspects of this document, and will be declared as non-responsive. The Proposal Evaluation Committee shall notify applicant consultant/firm(s) of the rejection of their Technical Proposal indicating that their Financial Proposals, if any, will be returned unopened after completing the selection process.

Proposal shall be evaluated jointly on "Technical" and "Financial" bids, with the weightage of 80% for Technical and 20% for financial.

i. ***Evaluation of Technical Proposals***

The Proposal received and found valid will be evaluated by EOBI to ascertain the best evaluated proposal in the interest of EOBI, for the complete work/services under these specifications and documents. In evaluating the Proposal, EOBI shall consider the ability and expertise of the HRM Consultant in undertaking all components of the scope of work and other ancillary services reasonably required by EOBI.

Technical evaluation shall be performed on the following parameters:

- A. Existence of the company for five (05) years or more;
- B. Financial strength of the company as exhibited by its financial audit reports of last three (03) financial years;
- C. Project management experience of more than [2,000 candidates];
- D. Infrastructure and technological capacity of over 200 computer systems and ancillary systems;
- E. Experience in conducting written/on-line evaluation/examinations.

The minimum qualifying score in aggregate shall be 70%. Successful applicants will be notified before opening Financial Proposals.

ii. ***Evaluation of Financial Proposals***

Only those applicants, who secure 70% marks or above in the Technical Proposal shall qualify for opening of financial proposal. The applicant consultants/firms will quote a lump-sum fee for all components and services falling within the scope of work, together with a component wise breakdown of the fees/charges.

7. **PUBLIC OPENING**

- i. The Financial Proposals of the technically qualified consultants/firms will be opened publicly in the presence of their representatives and the prices and terms of all the proposals will be publicked.
- ii. The Proposal Evaluation Committee will check and make the arithmetical correction if required, and examine compliance of all financial inputs by each bidder.
- iii. In case of difference of rate in words and numerical value rate in words will be taken as correct and will be multiplied (if required) and cost of the item corrected accordingly.

8. **AWARD OF CONTRACT**

- i. For the purpose of awarding of Contract, the technical proposal will be allotted weightage of 80%, while financial proposal will be allotted weight age of 20%.
- ii. Financial proposal with lowest quoted price for services will be given financial score of 100 and other proposals will be given financial scores that will be calculated on the following basis:

$$\text{Financial Score} = \text{Value B1} / \text{Value B2, B3 or B4} * 100$$

B2, B3 and B4 etc are the second, third, and fourth lowest financial proposals and so on.

- iii. On the basis of combined weightage score for quality and cost, the HRM Consultant shall be ranked in terms of total score obtained. The Proposal

obtaining the highest total combined score in evaluation of quality and cost will be ranked as HI, and the bidder of the same shall be invited by EOBI to enter into a contract.

- iv. The selection of the HRM Consultant will be at the sole judicious discretion of EOBI which reserves rights to accept or reject any or all the Proposals without assigning any reasons. EOBI reserves the right to call for additional relevant information from the applicants.
- v. The prospective HRM Consultant shall be expected to commence the assignment on the date and at the location specified in the Data Sheet.

9. **CONFIDENTIALITY**

The information relating to evaluation of Proposals and recommendations concerning awards shall be circulated amongst the bidders as per PPRA Rules. The undue use by any applicant consultants/firm of confidential information related to the process may cause rejection of its Proposal and may action under the provisions of the relevant General and special law of the land.

Section – A: Data Sheet

Data Sheet Reference No.	Description
1.1	Name of the Client: EOBI Method of selection of Consultant/Firms: Quality Based Selection
2.1	Financial Proposal to be submitted together with Technical Proposal: Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
2.2	Name of the assignment is: <u>HUMAN RESOURCE CONSULTANCY SERVICES</u>
3.1	A pre-proposal conference will be held: Yes_ No <input checked="" type="checkbox"/>
3.2	Pre-proposal Conference date and place: <u>N/A</u>
4.1	The Client's representative is: Deputy Director General (HR & GA) Address: G.P.O. Building 1.1. Chundrigar Road Karachi <hr/>
4.2	Telephone: 021-99217913/4 E-mail: info@EOBI.biz
5.1	The Client will provide the following data inputs and facilities: <u>Broad concept of the project and any data which is available and relevant to consultancy services. EOBI would also provide working space, internet connectivity, systems and other material required for performance of services.</u>
6.1	Proposals must remain valid till 90 days after the proposal submission date.

Note: While filling the data sheet, Bidders/ Firms are at liberty to use as many additional sheets as needed. This is applicable to all sections, FORM etc.

7.1	Proposals shall be submitted in <u>English language</u> :																		
8.1	Consultant/Firms may associate with other Consultant/Firms: Yes <input checked="" type="checkbox"/> No <input type="checkbox"/> _____																		
9.1	The format of the Technical Proposal to be submitted is: <u>Full Technical Proposal (FTP)</u>																		
10.1	Amounts payable by the Client to the Consultant/Firm under the contract to be subject to local taxation: Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>																		
11.1	Consultant/Firm must submit the <u>original and 01 copy</u> of the Technical Proposal, and the original of the Financial Proposal.																		
12.1	The Proposal submission address is: G.P.O. Building 1.1. Chundrigar Road Karachi _____																		
12.2	Proposals must be submitted within fifteen days from the date of publication on website of EOBI, website of PPRA or print media as the case may be.																		
13.1	Proposal Presentation: Yes (if required) ,																		
14.1	<p>Evaluation of the proposal shall be made as Technical 80%, Financial 20%</p> <p>The Technical and Financial Proposal shall be duly signed by the authorized representative or the applicant, failing which the proposal would be considered non responsive.</p> <p>Criteria, sub-criteria, and point system for the evaluation of Full Technical Proposals are: <u>Points</u></p> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="padding-left: 20px;">(i) Specific experience of the Consultant/Firms relevant to the assignment:</td> <td style="text-align: right; vertical-align: bottom;">[10]</td> </tr> <tr> <td colspan="2" style="padding-top: 10px;">(ii) Adequacy of the proposed methodology and work plan:</td> </tr> <tr> <td style="padding-left: 40px;">a) Technical approach and methodology</td> <td style="text-align: right; vertical-align: bottom;">[10]</td> </tr> <tr> <td style="padding-left: 40px;">b) Work plan</td> <td style="text-align: right; vertical-align: bottom;">[10]</td> </tr> <tr> <td style="padding-left: 40px;">c) Organization and staffing</td> <td style="text-align: right; vertical-align: bottom;">[10]</td> </tr> <tr> <td style="padding-left: 80px;">Total points for criterion (ii):</td> <td style="text-align: right; vertical-align: bottom;">[30]</td> </tr> <tr> <td style="padding-top: 10px;">(iii) Financial Strength</td> <td style="text-align: right; vertical-align: bottom;">[10]</td> </tr> <tr> <td style="padding-top: 10px;">(iv) Infrastructure</td> <td style="text-align: right; vertical-align: bottom;">[10]</td> </tr> <tr> <td style="padding-top: 10px;">(v) Key professional staff qualifications and competence for the assignment</td> <td></td> </tr> </table>	(i) Specific experience of the Consultant/Firms relevant to the assignment:	[10]	(ii) Adequacy of the proposed methodology and work plan:		a) Technical approach and methodology	[10]	b) Work plan	[10]	c) Organization and staffing	[10]	Total points for criterion (ii):	[30]	(iii) Financial Strength	[10]	(iv) Infrastructure	[10]	(v) Key professional staff qualifications and competence for the assignment	
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c) Organization and staffing	[10]																		
Total points for criterion (ii):	[30]																		
(iii) Financial Strength	[10]																		
(iv) Infrastructure	[10]																		
(v) Key professional staff qualifications and competence for the assignment																			

	a) Team Leader (minimum 5 years of experience)	[15]
	b) Proposed Staff qualifications and competence	[25]
	Total points for criterion (iii):	[40]
	The number of points assigned to each of the above positions or disciplines will be determined considering the following three sub criteria and relevant percentage weights:	
	1) General qualifications	[20%]
	2) Adequacy for the assignment	[50%]
	3) Experience	[10%]
	4) Financial Strength	[10%]
	5) Infrastructure	[10%]
	Total weight:	[100%]

FORM TECH-1 TECHNICAL PROPOSAL SUBMISSION FORM

[Location, Date]

To: [Name and address of Client]

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/Firm]

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 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 Paragraph Reference 12.2 of the Data Sheet.

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

Yours sincerely,

Authorized Signature [In full and initials]: _____

Name and Title of Signatory: _____

Name of Firm: _____

Address: _____

FORM TECH-2 CONSULTANT/FIRM'S ORGANIZATION AND EXPERIENCE

A - Consultant/Firm'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/Firm'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 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 Pak Rs.):
Country: Location within country:	Duration of assignment (months):
Name of Client:	Total No of staff-months of the assignment:
Address:	Approx. value of the services provided by your firm under the contract (in Pak Rs.):
Start date (month/year): Completion date (month/year):	No of professional staff-months provided by associated Consultant/Firms:
Name of associated Consultant/Firms, 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:	

Firm's Name: _____

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

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 expected 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 Client), and delivery dates of the reports.

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-4 TEAM COMPOSITION AND TASK ASSIGNMENTS

Professional Staff			
Name of Staff	Firm	Area of Expertise	Position 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. **Education** [*Indicate college/university and other specialized education of staff member, giving names of institutions, degrees obtained, and dates of obtainment*]:
6. **Membership of Professional Associations**: _____
7. **Other Training** [*Indicate significant training since degrees under 5 - Education were obtained*]: _____
8. **Countries of Work Experience**: [*List countries where staff has worked in the last ten years*]: _____
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): dates of employment, name of employing organization, positions held.*]:
From [Year]: _____ To [Year]: _____
Employer: _____
Positions held: _____

11. Certification:

I, the undersigned, certify that to the best of my knowledge and belief, this CV correctly describes my qualifications, my experience, and myself. 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: _____

Section – B FIN-1: Financial Proposal – Standard Forms

[Location, Date]

To: *[Name and address of Client]*

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 Technical Proposal. Our attached Financial Proposal is for the sum of *[Insert amount(s) in words and figures]*.

Our Financial Proposal shall be binding upon, up to expiration of the validity period of the Proposal, i.e. before the date indicated in the Data sheet.

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

Yours sincerely,

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

Name and Title of Signatory: _____

Name of Firm: _____

Address: _____
