



**Poverty & Human Development Monitoring Agency (PHDMA)**  
**Planning & Convergence Department**

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Date: 03.06.2022

**Notice**

**REQUEST FOR PROPOSAL (RFP)**

**Selection of Agency for providing Services of Theme-based Professionals for Monitoring & Evaluation in Human Development Perspective**

Poverty & Human Development Monitoring Agency (PHDMA), Planning & Convergence Department, Government of Odisha invites sealed proposals from eligible bidders to carry out “Selection of Agency for providing Services of Theme-based Professionals for Monitoring & Evaluation in Human Development Perspective”. Bidders fulfilling the prescribed eligibility criteria of the RFP can access and download the complete RFP Document including other details from the website i.e., <https://www.odisha.gov.in> and <http://www.phdma.odisha.gov.in>.

The major events under the bid process are:

Sl. No.	List of Key Events	Critical Dates
1	Date of Issue of RFP	04.06.2022
2	Last Date for Submission of Bid	20.06.2022
3	Date of Opening of Technical Bid	22.06.2022
4	Date of Opening of Financial Bid	27.06.2022

The proposal complete in all respects must reach the undersigned by **Speed Post/ Registered Post** only latest by **20.06.2022 before 5.00 PM** in a sealed envelope clearly mentioning on the top of it “**REQUEST FOR PROPOSAL – SELECTION OF AGENCY FOR PROVIDING SERVICES OF THEME-BASED PROFESSIONALS FOR MONITORING & EVALUATION IN HUMAN DEVELOPMENT PRESPECTIVE**”. The proposals received beyond the last date and time will be rejected. The authority reserves the right to reject any/ all proposals without assigning any reason thereof.

**Address for Submission of Proposal:**

**Member Secretary,  
Poverty & Monitoring Agency (PHDMA)  
Planning & Convergence Department,  
Lokaseva Bhavan, Bhubaneswar,  
PIN-751001 Odisha**

**Sd/-  
Member Secretary, PHDMA**



**REQUEST FOR PROPOSAL**

**Selection of Agency for providing Services of Theme-based Professionals for Monitoring & Evaluation in Human Development Perspective**



TRANSFORMATIVE INITIATIVE AND  
SUSTAINABLE DEVELOPMENT

**POVERTY & HUMAN DEVELOPMENT MONITORING AGENCY  
PLANNING & CONVERGENCE DEPARTMENT**

**June, 2022**

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## **DISCLAIMER**

This Request for Proposal (**RFP**) is issued by the **Poverty & Human Development Monitoring Agency (PHDMA)**, Planning & Convergence Department, Government of Odisha.

While the information in this RFP has been prepared in good faith, it does not support to be comprehensive or to have been independently verified. Neither **PHDMA** nor any of its officers or employees, nor any of their advisers nor specialists / professionals and/or consultants accept any liability or responsibility for the accuracy, reasonableness or completeness of, or for any errors, omissions or misstatements, negligent or otherwise, relating to the proposed assignment, or makes any representation or warranty, express or implied, with respect to the information contained in this **RFP** or on which this **RFP** is based or with respect to any written or oral information made or to be made available to any of the recipients or their professional advisers and, so far as permitted by law and except in the case of fraudulent misrepresentation by the party concerned, and liability therefore is hereby expressly disclaimed.

The information contained in this **RFP** is selective and is subject to updating, expansion, revision and amendment at the sole discretion of the **Client**. It does not claim to contain all the information that a recipient may require for the purposes for making a decision for participation in this selection process. Each bidder must conduct its own analysis of the information contained in this **RFP**, to correct any inaccuracies therein and is advised to carry out its own investigation into the proposed assignment, the regulatory regime which applies thereto and by and all matters pertinent to the project and to seek its own professional advice on the legal, financial and regulatory consequences of entering into any agreement or arrangement relating to the project.

This RFP includes certain statements, information, projections and forecasts with respect to the proposed assignment. Such statements, information, projections and forecasts reflect various assumptions made by the management, officers and employees of the **Client**, which (the assumptions and the base information on which they are made) may or may not prove to be correct. No representation or warranty is given as to the reasonableness of forecasts or the assumptions on which they may be based and nothing in this **RFP** is, or should be relied on as, a promise, representation or warranty.

**PHDMA**, Planning & Convergence Department, Government of Odisha shall be the sole and final authority with respect to selection of a *Theme-based Professional* for the purpose through this **RFP**.

**BIDDER DATA SHEET**

Sl. No.	Particular	Details
1.	Name of the Client	Poverty & Human Development Monitoring Agency (PHDMA)
2.	Method of Selection	Quality and Cost Based Selection (QCBS) Method
3.	Availability of RFP Document	<a href="https://www.odisha.gov.in">https://www.odisha.gov.in</a> <a href="http://www.phdma.odisha.gov.in">http://www.phdma.odisha.gov.in</a>
4.	Date of Issue of RFP	04.06.2022
5.	Deadline for Submission of Pre-Proposal Query	13.06.2022
6.	Issue of Pre-proposal Clarifications	17.06.2022
7.	Last Date for submission of Proposal	20.06.2022
8.	Date of opening of Technical Proposal	22.06.2022
9.	Date of Technical Proposal Presentations	24.06.2022
10.	Date of opening of Financial Proposal	27.06.2022
11.	Bid Processing Fee (Non-Refundable)	INR10,000/- (Rupees Ten Thousand) (including GST) in the form of demand draft drawn in favor of “ <b>Poverty &amp; Human Development Monitoring Agency (PHDMA), Planning &amp; Convergence Department</b> ” drawn in any Scheduled Commercial Bank payable at Bhubaneswar.  The Bid Processing Fee shall be submitted along with the 1 <sup>st</sup> Inner Envelope of the Technical Proposal.
12.	Bid Security Declaration	All bidders will be required to submit a bid security declaration as provided in <b>TECH 11</b> of this document
13.	Contact Person	<b>OSD, PHDMA, P &amp; C Department, Lokaseva Bhavan, Bhubaneswar-751001.</b>

14.	<b>Address for Submission of Proposal</b>	<p><b>Member Secretary, PHDMA,</b> 2<sup>nd</sup> Floor North Annex Building, Lokaseva Bhavan, Odisha State Secretariat Bhubaneswar, PIN-751001 Odisha</p> <p><b>Mode of Submission:</b> <i>Speed Post / Registered Post</i> only to the address as specified above during the office hour only. Submission of bid through any other mode and late bid will be rejected.</p>
15.	<b>Place of Opening of Proposal:</b>	<p><b>Conference Hall of PHDMA, P &amp; C Department,</b> 2<sup>nd</sup> Floor North Annex Building, Lokaseva Bhavan, Odisha State Secretariat Bhubaneswar, PIN-751001 Odisha</p>

*For details please visit:* <http://www.phdma.odisha.gov.in>

**SECTION: 1**

**LETTER OF INVITATION**

## **LETTER OF INVITATION**

**RFP No: 393/6/22**

**Dated: 03.06.2022**

**Name of the Assignment:** *Selection of Agency for providing Services of Theme-based Professionals for Monitoring & Evaluation in Human Development Perspective*

1. **PHDMA, P & C Department, Government of Odisha (“The Client”)** invites sealed proposal from eligible bidder for **“Selection of Agency for providing Services of Theme-based Professionals for Monitoring & Evaluation in Human Development Perspective”**. More details on the proposed study are provided at **Section-3: Terms of Reference (ToR)** of this RFP Document.
2. A bidder will be selected under **QCBS Selection** procedure as prescribed in the RFP Document in for **“Guidelines for Engagement of Consultants and Outsourcing of Services”** in accordance with the policies and procedures vide Office Memorandum No. 37323/F, Dated: 30.11.2018 of Finance Department, Government of Odisha.
3. The proposal complete in all respect as specified in the RFP Document must be accompanied with a **Non- refundable** amount of **Rs. 10,000/- (Rupees Ten Thousand only)** towards **Bid Processing Fee** in favor of **“Poverty & Human Development Monitoring Agency, P&C Department”**, drawn in any scheduled commercial bank and payable at Bhubaneswar, Odisha failing which the bid will be rejected.
4. The proposal must be delivered at the specified address as per the Bidder Data Sheet by **Speed post / Registered Post** only. The Client shall not be responsible for postal delay or any consequence. Submission of proposal through any other mode will be rejected.
5. The last date and time for submission of proposal complete in all respects is **Dt. 20.06.2022 before 5.00 PM** and the date of opening of the technical proposal is **Dt. 22.06.2022** in the presence of the bidder’s representative at the specified address as mentioned in the Bidder Data Sheet (**Sl. no.14**). Representatives of the bidders may attend the meeting with due authorization letter on behalf of the bidder.
6. This RFP includes following sections:
  - a. Letter of Invitation [**Section – 1**]
  - b. Information to the Bidder [**Section – 2**]
  - c. Terms of Reference [**Section – 3**]
  - d. Technical Proposal Submission Forms [**Section – 4**]
  - e. Financial Proposal Submission Form (**Section –5**)



**f. Annexure (Section – 6)**

7. While all information/data given in the RFP are accurate within the consideration of scope of the proposed assignment to the best of the **Client's** knowledge, the **Client** holds no responsibility for accuracy of information and it is the responsibility of the bidder to check the validity of information/data included in this RFP. The Client reserves the right to accept / reject any / all proposals / cancel the entire selection process at any stage without assigning any reason thereof.

**Sd/-**  
**Member Secretary, PHDMA**

**SECTION: 2**

**INFORMATION TO THE BIDDER**

## 1. **Pre-Qualification Criteria:**

Before opening and evaluation of the technical proposals, each bidder will be assessed based on the following pre-qualification criteria. The bidder is required to produce the copies of the required supportive documents / information as part of their technical proposal failing which the proposals will be rejected.

<b>Sl. No.</b>	<b>Eligibility Criteria</b>	<b>Supportive Documents</b>
1.	The Bidder should be a Company/ Firm/ LLP registered in India with a track record of providing consulting/ advisory services for at least 5 years as on March 31, 2022.	Incorporation/ Registration/Incorporation Certificate.
2.	The Bidder should have an average turnover of minimum INR 50 crore during last three financial years (FY 2018-19, FY 2019-20, FY 2020-21)	Certificate from statutory auditor/ audited financial statements for the three financial years
3.	The Bidder should have experience of working on minimum five (5) such assignments of a minimum duration of 1 year with Central/ State Government agencies in India	Work Order/ Copy of agreement/ Completion certificate
4.	The Bidder should have experience of completing consulting assignments of minimum duration of 6 months with at least three (3) different State Government Departments/ Departmental agencies in Odisha	Work Order/ Copy of agreement/ Completion certificate
5.	The Bidder should have experience of completing at least one Theme-Based Professional Service for a Central/ State Government agency in India	Work Order/ Copy of agreement/ Completion certificate
<b>Any kind of consortium/ Joint Venture with other firms is not allowed.</b>		

## **2. Documents / Formats needs to be submitted along with TECHNICAL PROPOSAL :**

The bidder has to furnish the following documents duly signed in along with their Technical Proposal:

- Filled in Bid Submission Check List in Original (**Annexure-I**)
- Covering letter (**TECH – 1**) on bidder's letterhead requesting to participate in the selection process.
- Bid Processing Fee as applicable.
- Copy of Certificate of Incorporation/ Registration.
- Copy of PAN.
- Copy of Goods and Services Tax Identification Number (GSTIN).
- Copies of IT Return for the last three assessment years (**AY 2019-20, 2020-21 & 2021-22**).
- General Details of the Bidder (**TECH – 2**).
- Financial Details of the bidder (**TECH – 3**) along with all the supportive documents as applicable duly signed as per the instruction.
- Power of Attorney (**TECH – 4**) in favor of the person signing the bid on behalf of the bidder or Board of Directors
- List of completed assignments of similar nature (Past Experience Details, **TECH- 5**) along with copies of contracts / work orders / completion certificate from previous Clients.
- Self-Declaration regarding Conflict of Interest (**TECH - 6**)

*Bidders should submit the required supporting documents as mentioned above. Bids not conforming to the eligibility criteria and non-submission of required documents as listed above will lead to rejection of the bid. Submission of forged documents will also result in rejection of the bid. Bidders are advised to study all instructions, forms, terms & conditions and other important information as mentioned in the RFP Document. The proposal must be complete in all respect, indexed and hard bound. Each page should be numbered and signed by the authorized representative.*

## **3. Bid Processing Fee :**

The bidder must furnish as part of technical proposal, the required bid processing fee amounting to **Rs. 10,000/- (Ten Thousand Rupees Only)** in shape of DD / BC from any

scheduled commercial bank in favor of “**Poverty & Monitoring Agency, P&C Department**” payable at Bhubaneswar. Proposals received without bid processing fee will be out rightly rejected.

**4. Bid Security Declaration:**

All bidders will be required to submit a bid security declaration as provided in TECH 11 of this document. Any Bidder violating the stipulated conditions in the Bid Security Declaration will be suspended for a period of one year.

**5. Validity of the Proposal:**

Proposals shall remain valid for a period of **180 (One Hundred Eighty Days)** from the date of opening of the technical proposal. The **Client** reserves the rights to reject a proposal valid for a shorter period as non- responsive and will make the best efforts to finalize the selection process and award of the contract within the bid validity period. The bid validity period may be extended on mutual consent.

**6. Pre -Proposal Queries:**

Bidders are allowed to submit their queries in respect of the RFP and other details if any, to **PHDMA, P&C Department** through e-mail at [phdmaodisha@gmail.com](mailto:phdmaodisha@gmail.com) till **13.06.2022**. Clarifications to the above will be uploaded in the PHDMA website / clarified through email to the respective bidders for the purpose of preparation of the proposal. Request for alternation / change in existing terms and conditions of the RFP will not be considered / entertained.

## 7. **Submission of Proposal:**

Bidder must submit their proposals by **Registered Post / Speed Post** only to the specified address on or before the last date and time for submission of proposals as mentioned in Bidder Data Sheet. The Client will not be responsible for postal delay / any consequence in receiving of the proposal. The proposal must have to be submitted in two parts. Each part should be separately bound with no loose sheets. Each page of the two parts should be page numbered and in conformation to the eligibility qualifications and clearly indicated using an index page. The Client will not consider any proposal that arrives after the deadline as prescribed in the Bidder Data Sheet. Any Proposal received after the deadline will be out rightly rejected by the Client.

The procedure for submission of the proposal is described below:

### i) **Technical Proposal (Original + 1 Copy):**

The envelope containing technical proposal shall be sealed and superscripted as “**Technical Proposal – Selection of Agency for providing Services of Theme-based Professionals for Monitoring & Evaluation in Human Development Perspective**” and to be furnished inside one envelope. The duly filled-in technical proposal submission forms, with all the supportive documents and information have to be furnished as part of technical proposal.

### ii) **Financial Proposal (Original):**

The envelope containing financial proposal shall be sealed and superscripted as “**Financial Proposal – Selection of Agency for providing Services of Theme-based Professionals for Monitoring & Evaluation in Human Development Perspective**”. The duly filled-in financial proposal submission forms should contain the detail price offer for the proposed assignment and to be furnished as per the prescribed format only.

The "**Technical Proposal**" and "**Financial Proposal**" must have to be submitted in two separate sealed envelopes (with respective marking in bold letters) along with the prescribed formats/information mentioned in the RFP Document. The first envelope must be marked as "**TECHNICAL PROPOSAL (Selection of Agency for providing Services of Theme-based Professionals for Monitoring & Evaluation in Human Development) Perspective**".

The second envelope must be marked as “**FINANCIAL PROPOSAL (Selection of Agency for providing Services of Theme-based Professionals for Monitoring & Evaluation in Human Development Perspective)**” and it should contain Financial Proposal only. Both the above envelopes have to be sealed and placed inside a third main envelope with proper labeling of following information in bold:

**NAME OF THE ASSIGNMENT:**

**RFP NUMBER AND DATE:**

**NAME OF THE BIDDER:**

**DEADLINE FOR SUBMISSION OF BID:**

## NAME AND ADDRESS OF THE BIDDER:

*Any deviation from the prescribed procedures / information / formats / conditions shall result in out-right rejection of the proposal. All the pages of the proposal have to be sealed and signed by the authorized representative of the bidder. Bids with any conditional offer shall be out rightly rejected. All pages of the proposal must have to be sealed and signed by the authorized representative of the bidder. Any conditional bids will be rejected.*

### 8. Opening of the proposal:

The FIRST ENVELOPE containing **TECHNICAL PROPOSAL** will be opened in the initial stage by the **Client** in presence of the bidder's representatives at the location, date specified in the Bidder Data Sheet. The Client will constitute a Theme-based Professional Evaluation Committee (TPEC) to evaluate the proposals submitted by bidders. Only one representative with proper authorization letter from the participating bidder will be allowed to attend the bid opening meeting. The SECOND ENVELOPE containing **FINANCIAL PROPOSAL** only of the **technically qualified bidders** will be opened after completion of technical evaluation stage. The date for opening of the financial proposal will be intimated accordingly to the technically qualified bidders well in advance.

### 9. Evaluation of Proposal:

A Three stage evaluation process will be conducted as explained below for evaluation of the proposals:

- **Preliminary Evaluation (1<sup>st</sup> Stage):** Preliminary evaluation of the proposals will be done to determine whether the proposal comply to the prescribed eligibility condition and the requisite documents / information have been properly furnished by the bidder or not. Submission of following documents / information will be verified:
  - ü Filled in Bid Submission Check List in Original (**Annexure-I**)
  - ü Covering letter (**TECH – 1**) on bidder's letter head requesting to participate in the selection process.
  - ü Bid Processing Fee as applicable.
  - ü Copy of Certificate of Incorporation/ Registration.
  - ü Copy of PAN.
  - ü Copy of Goods and Services Tax Identification Number (GSTIN)
  - ü Copies of IT Return for the last three assessment years (**AY 2019-20, 2020-21 & 2021-22**).
  - ü General Details of the Bidder (**TECH – 2**).
  - ü Financial Details of the bidder (**TECH – 3**) along with all the supportive documents as applicable duly signed and certified as per the instruction.
  - ü Power of Attorney (**TECH – 4**) in favor of the person signing the bid on behalf of the bidder.
  - ü List of completed assignments of similar nature (Past Experience Details, **TECH – 5**) along with copies of contracts / work orders / completion certificate from previous Clients.
  - ü Self Declaration on Conflict of Interest (**TECH - 6**).
  - ü Duly filled in Technical Proposal Forms (**TECH - 7 to 11**)

- ü All the pages of the proposal and enclosures/attachments are signed by the authorized representative of the bidder.

***\* Bids not complying to any of the above requirement, will be out rightly rejected at the discretion of the Client's authority.***

**TECHNICAL EVALUATION (2<sup>nd</sup> Stage):** Technical proposal will be opened and evaluated for those bidders who qualify the preliminary evaluation stage.

Detailed evaluation process as per the following parameters will be adopted for evaluation of the proposals.

<b>Criteria</b>	<b>Maximum Points</b>
<b>1. Experience of the bidder</b>	<b>20</b>
<ul style="list-style-type: none"> <li>• Experience of undertaking such assignments of a minimum duration of 2 years with Central/ State Government agencies in India in sectors concerning one or more of the 17 SDG Goals; Each relevant assignment will carry 01 marks</li> </ul>	10
<ul style="list-style-type: none"> <li>• Experience of completing assignments of a minimum duration of 6 months with different State Government Departments/Departmental agencies in Odisha Each relevant assignment will carry 02 marks</li> </ul>	10
<p><b>2. Relevant experience of the Theme-based Professional staff proposed for the Assignment</b></p> <p>The team will comprise of multi-disciplinary project team of 5 units as described below:</p>	<b>40</b>



<p><b>a) Theme based professional(One)- Narrative Based &amp; related basket of research &amp; evaluation methods (oral)</b></p> <p>Master’s Degree/ Post- Graduate in Social Sciences from reputed National/International Institution/ University, with minimum 4 years of research/evaluation/documentation experience in using oratory methods of data collection like narratives &amp; similar methods</p> <p>2 years of experience – 4 marks More than 2 years of relevant experience – 5 marks Master’s Degree from a top 10 NIRF / International (2020) ranked institution – 2 marks Proficiency in Odia(Written/Spoken)- 1 Mark</p>	<p>8</p>
<p><b>b) Theme based professional(One)- Visual Anthropology &amp; related basket of research &amp; evaluation methods (visual)</b></p> <p>Master’s Degree/ Post- Graduate in Social Sciences/Film Studies/related professional degrees with focus on visual forms of expression from reputed National/International Institution/ University, with minimum 4 years of research/evaluation/documentation experience in using visual methods of data collection &amp; analysis like pictures, spatial data, audio visuals etc...</p> <p>2 years of experience – 4 marks More than 2 years of relevant experience – 5 marks Master’s Degree from a top 10 NIRF / International (2020) ranked institution – 2 marks Proficiency in Odia(Written/Spoken)- 1 Mark</p>	<p>8</p>
<p><b>c) Theme based professional(One)- Data Sensing &amp; related basket of research &amp; evaluation methods (quantitative &amp; data visualization)</b></p> <ul style="list-style-type: none"> <li>• Master’s Degree/ Post- Graduate in Social Sciences with focus on quantitative analysis / Economics/ Econometrics/ Information Design/ Data system design from reputed National/ International Institution/ University, with minimum 4 years of research/evaluation/analytics experience in using quantitative &amp; qualitative data for insights/ building data systems/business analytics</li> </ul> <p>2 years of experience – 4 marks</p>	<p>8</p>

<p>More than 2 years of relevant experience – 5 marks                  Master’s Degree from a top 10 NIRF / International (2020) ranked institution – 2 marks                  Proficiency in Odia(Written/Spoken)- 1 Mark</p>	
<p><b>d) Theme based professionals(Two)- Curriculum Development &amp; Training Execution</b></p> <ul style="list-style-type: none"> <li>• Master’s Degree/ Post- Graduate in Education/M.Ed/Instruction Design and similar courses which include subjects on teaching-learning-pedagogy</li> <li>• Previous experience in <b>designing of curriculum for adult learning</b> as well as execution of training in social sector, academic setting, civil society organizations etc.                      3 years -5 years of experience – 4 marks                      More than 5 years of experience – 5 marks                      Master’s Degree from a top 10 NIRF / International (2020) ranked institution – 2 marks                      Proficiency in Odia (Written/Spoken)- 1 Mark</li> </ul>	8
<p><b>e) Coordinator: Documentation, Reporting &amp; MIS</b></p> <ul style="list-style-type: none"> <li>• Bachelor’s degree from reputed National/International Institution/ University, with minimum 2 years of experience working with Central and State Government agencies/reputed corporates for MIS, documentation and reporting.                      2 years of experience – 3 marks                      More than 2 years of experience – 4 marks                      Bachelor’s Degree from a top 10 NIRF / International (2020) ranked institution – 2 marks                      Proficiency in Odia(Written/Spoken)- 1 Mark</li> </ul>	8
<p><b>3. Presentation on bidder’s plan for continuous capacity building of the theme based professionals and analyst throughout the duration of contract</b></p>	<b>30</b>
<p><b>4. Firm turnover</b>                      INR 50 Cr – INR 75 Cr – 5 points                      INR 75 Cr – INR 100 Cr –7points                      INR 100 Cr and above - 10 points</p>	<b>10</b>
<p><b>Total</b></p>	<b>100</b>

Copies of work orders/agreement/ completion certificates must be submitted as a proof for each assignment. No assignment should be repeated across various categories of evaluation

parameters. Ongoing assignments will be considered for evaluation only if 6 months of the project period have elapsed.

All the 5 team members are expected to be deployed full-time for a period of 3 years at PHDMA. Office space with necessary facilities shall be provided by PHDMA to the team. None of the team members should engage in any other engagement while being deployed at PHDMA.

In case PHDMA needs any additional resources with specific expertise for a certain duration of the assignment towards successful achievement of the desired outcomes, the same shall be deployed by the selected bidder as per mutually agreed terms and conditions.

*\* Bidders who secure above 70 marks from the total (100 marks) in the technical proposal will be called for financial evaluation.*

**FINANCIAL EVALUATION (3<sup>rd</sup> Stage):** The financial proposals of only those bidders qualifying the technical evaluation (2<sup>nd</sup> Stage) shall be opened at this stage in the presence of the bidder's representative who wishes to attend the meeting with proper authorization letter. The name of the bidder along with the quoted financial price will be announced during the meeting.

#### **10. Evaluation Process:**

QCBS method will be followed during the overall selection process. The financial bids of technically qualified bidders will be opened on the prescribed date in the presence of bidder's representatives.

The lowest evaluated Financial Bid (Fm) shall be given the maximum financial score (Sf) of 100. The formula for determining the financial scores of all other bids shall be calculated as follows:  $Sf = 100 \times Fm/F$ , in which "Sf" is the financial score, "Fm" is the lowest price, and "F" the price of the bid under consideration. The weights given to the Technical (T) and Financial (P) Bids shall be:

$$T = 80, \text{ and} \\ P = 20$$

Bids shall be ranked according to their combined scores, calculated using the technical score (St) and financial score (Sf) and the weights as follows:

$$S = St \times T\% + Sf \times P\%$$

The bidder, who has the highest score in the QCBS and shall be called for further process leading to the award of the contract. The bid price will include all taxes as applicable and shall be in Indian Rupees. Prices quoted in the bid must be firm and final, and shall not be subject to any modifications on any account whatsoever. **In case of a tie, the bidder having higher technical score will be considered the preferred bidder.**

For the purpose of evaluation, the total evaluated cost shall be inclusive of all taxes & duties for which the Client will make payment to the theme based professional including overhead expenses .

#### **11. Performance Bank Guarantee: (PBG)**

Within 7 days of notifying the acceptance of a proposal for award of contract, each qualified bidder shall have to furnish a Performance Bank Guarantee amounting to **3% of the contract value** from a scheduled commercial bank situated in Bhubaneswar in favor of **“Poverty & Human Development Monitoring agency, P & C Department”**, as per the format at **Annexure- II**, for a period of three months beyond the entire contract period (i.e. PBG must be valid from the date of effectiveness of the contract to a **period of 3 months beyond the contract period**) as its commitment to perform services under the contract. Failure to comply with the requirements shall constitute sufficient grounds for the forfeiture of the PBG. The PBG shall be released immediately after three months of expiry of contract provided there is no breach of contract on the part of the qualified bidder. No interest shall be paid on the PBG.

#### **12. Contract Negotiation:**

Contract negotiation, if required will be held at a date, time and address as intimated to the selected bidder/s. The bidder will, as a pre-requisite for attendance at the negotiations, confirm availability of all the proposed staff for the assignment. Representative conducting negotiations on behalf of the bidder must have written authority to negotiate and conclude a contract. Negotiation will be performed covering technical and financial aspects, if any and availability of proposed professionals etc.

#### **13. Award of Contract:**

After completion of the contract negotiation stage, the Client will notify the successful bidder in writing by issuing an offer letter for signing the contract and promptly notifying all other bidders about the result of the selection process. The successful bidders will be asked to sign the contract after fulfilling all formalities within 15 days of issuance of the offer letter. After signing of the contract, no variation or modification of the terms of the contract shall be made except by written amendment signed by both the parties. The contract will be valid for **3 years** from the date of effectiveness of the contract. ***Sub-contracting / outsourcing of any form shall not be allowed for any activities under this RFP.***

#### **14. Conflict of Interest:**

Conflict of interest exists in the event of:

- (i) conflicting assignments, typically monitoring and evaluation/environmental assessment of the same project by the eligible bidder;

- (ii) Theme based professionals, agencies or institutions (individuals or organizations) who have a business or family relation with the Client directly or indirectly; and
- (iii) practices prohibited under the anti-corruption policy of the Government of India and Government of Odisha. The bidders are to be careful so as not to give rise to a situation where there will be any conflict of interest with the Client as this would amount to their disqualification and breach of contract.

#### **15. Disclosure:**

- a. Bidders have an obligation to disclose any actual or potential conflict of interest. Failure to do so may lead to disqualification of the bidder or termination of its contract.
- b. Bidders must disclose if they are or have been the subject of any proceedings (such as blacklisting) or other arrangements relating to bankruptcy, insolvency or the financial standing of the Bidder, including but not limited to appointment of any officer such as a receiver in relation to the Bidder's personal or business matters or an arrangement with creditors, or of any other similar proceedings.
- c. Bidders must disclose if they have been convicted of, or are the subject of any proceedings relating to:
  - a criminal offence or other serious offence punishable under the law of the land, or where they have been found by any regulator or professional body to have committed professional misconduct;
  - corruption including the offer or receipt of an inducement of any kind in relation to obtaining any contract;
  - Failure to fulfill any obligations in any jurisdiction relating to the payment of taxes or social security contributions.

#### **16. Anti-corruption Measure:**

- a. Any effort by Bidder(s) to influence the Client in the evaluation and ranking of financial proposals, and recommendation for award of contract, will result in the rejection of the proposal.
- b. A recommendation for award of Contract shall be rejected if it is determined that the recommended bidder has directly, or through an agent, engaged in corrupt, fraudulent, collusive, or coercive practices in competing for the contract in question. In such cases, the Client shall blacklist the bidder either indefinitely or for a stated period of time, disqualifying it from participating in any related bidding process for the said period.

#### **17. Language of Proposals:**

The proposal and all related correspondence exchanged between the bidder and the Client shall be written in the **English** language. Supporting documents and printed literature that are part of the proposal may be in another language provided they are accompanied by an

accurate translation of the relevant passages in English with self-certification for accuracy, in which case, for the purposes of interpretation of the Proposal, the translated version shall govern.

**18. Cost of bidding:**

The Bidder shall bear all costs associated with the preparation and submission of its proposal. The Client shall not be responsible or liable for those costs, regardless of the conduct or outcome of the bidding process. Bidder/s is/are not allowed to submit more than one proposal under the selection process. Alternate bids are also not allowed.

**19. Legal Jurisdiction:**

All legal disputes are subject to the jurisdiction of civil court of Bhubaneswar only.

**20. Governing Law and Penalty Clause:**

The schedule given for delivery is to be strictly adhered to in view of the strict time schedule. Any unjustified and unacceptable delay in delivery shall render the bidder liable for liquidated damages and thereafter the Client holds the option for cancellation of the contract for pending activities and complete the same from any other agency. The Client may deduct such sum from any money from their hands due or become due to bidder. The payment or deduction of such sums shall not relieve the bidder from his obligations and liabilities under the contract. The rights and obligations of the Client and the bidder under this contract will be governed by the prevailing laws of Government of India / Government of Odisha. Failure on bidder's part to furnish the deliverables as per the agreed timeline will enforce a penalty @ **1% per week subject to maximum of 10% of the total contract value**. The amount will be deducted from the subsequent payment. In addition, the PBG amount shall also be forfeited. The decision of the authority placing the contract, whether the delay in development has taken place on account of reasons attributed to the bidder shall be final.

**21. Confidentiality:**

Information relating to evaluation of proposals and recommendations concerning awards shall not be disclosed to the bidders who submitted the proposals or to other persons not officially concerned with the process, until the publication of the award of contract. The undue use by any Theme based professional of confidential information related to the process may result in rejection of its proposal and may be subject to the provisions of the Client's antifraud and corruption policy. During the execution of the assignment except with prior written consent of the Client, the theme based professional or its personnel shall not at any time communicate to any person or entity any confidential information acquired in the course of the contract.

**22. Amendment of the RFP Document:**

At any time before submission of proposals, the Client may amend the RFP by issuing an

addendum through P&C Department website. Any such addendum will be binding on all the bidders. To give bidders reasonable time in which to take an addendum into account in preparing their proposals, the Client may, at its discretion, extend the deadline for the submission of the proposals.

**23. Client's right to accept any proposal, and to reject any or all proposal/s**

The Client reserves the right to accept or reject any proposal, and to annul or amend the bidding / selection / evaluation process and reject all proposals at any time prior to award of contract award, without assigning any reason there of and thereby incurring any liability to the bidders.

**24. Copyright, Patents and Other Proprietary Rights:**

P&C Department, Government of Odisha shall be entitled to all intellectual property and other proprietary rights including but not limited to patents, copyrights and trademarks, with regard to documents and other materials which bear a direct relation to or are prepared or collected in consequence or in the course of the execution of this contract. At the Client's request, the Theme based professional shall take all necessary steps to submit them to the Client in compliance with the requirements of the contract.

**25. Replacement of Key Personnel:**

The key professionals to be deployed under this contract must be dedicated for the contract period. However, the Client reserves the right to request the Theme based professional to replace the assigned personnel if they are not performing to a level of satisfaction. After written notification, the Theme based professional will provide CV of appropriate candidates within Seven (7) days for review and approval. The Theme based professional must replace the personnel within seven (7) working days from the date of approval of replacement. If one or more key personnel become unavailable / leave the project for any reason midway under the contract, the Theme based professional must notify the Client at least fourteen (14) days in advance, and obtain the approval prior to making any substitution. In notifying the Client, the Theme based professional shall provide an explanation of circumstances necessitating the proposed replacement and submit justification and qualification of replacement personnel in sufficient detail to permit evaluation of the impact on the engagement. Acceptance of a replacement person by the Client shall not relieve the theme based professional from responsibility for failure to meet the requirements of the contract. Change in key professionals without due approval by the Authority will lead to implication of liquidated damage of **10% of the contract value**.

**26. Force Majeure:**

For purpose of this clause, Force Majeure? means an event beyond the control of the agency and not involving the agency's fault or negligence and not foreseeable. Such events may include, but are not restricted, wars or revolutions, fires, floods, riots, civil commotion, earthquake, epidemics or other natural disasters and restriction imposed by the Government or other bodies, which are beyond the control of the agency, which prevents or delays the execution of the order by the agency. If a force Majeure situation arises, the agency

shall promptly notify Client in writing of such condition, the cause thereof and the change that is necessitated due to the condition. Until and unless otherwise directed by the Client in writing, the Agency shall continue to perform its obligations under the contract as far as is reasonably practical, and shall seek all reasonable alternative means for performance not prevented by the Force Majeure event. The agency shall advise Client in writing, the beginning and the end of the above causes of delay, within seven days of the occurrence and cessation of the Force Majeure condition. In the event of a delay lasting for more than one month, if arising out of causes of Force Majeure, Client reserve the right to cancel the contract without any obligation to compensate the agency in any manner for whatsoever reason.

**27. Settlement of Disputes:**

The Client and the Theme based professional shall make every effort to resolve amicably, by direct informal negotiation, any disagreement or dispute arising between them under or arising from or in connection with the Contract within thirty (30) days from the commencement of such informal negotiation. All dispute resolution proceedings shall be held at Bhubaneswar, Odisha, and the language of such proceedings and that of all documents and communications between the parties shall be in English. Development Commissioner-cum-Additional Chief Secretary and Secretary to Government, P&C Department will be the final authority to resolve the dispute arising between and the Client and the Theme based professional.

**28. Disqualification of Proposal:**

The proposal is liable to be disqualified in the following cases as listed below:

- Proposal submitted without Bid Processing Fee as applicable
- Proposal not submitted in accordance with the procedure and formats as prescribed in the RFP
- During validity of the proposal, or its extended period, if any, the bidder increases the quoted prices
- Proposal is received in incomplete form
- Proposal is received after due date and time for submission of bid
- Proposal is not accompanied by all the requisite documents / information
- A commercial bid submitted with assumptions or conditions
- Bids with any conditional technical and financial offer
- If the bidder provides any assumptions in the financial proposal or qualifies the commercial proposal with its own conditions, such proposals will be rejected even if the commercial value of such proposals is the lowest / best value
- Proposal is not properly sealed or signed
- Proposal is not conforming to the requirement of the scope of the work of the assignment.
- Bidder tries to influence the proposal evaluation process by unlawful/corrupt/fraudulent means at any point of time during the bid process
- If, any of the bid documents (including but not limited to the hard and soft/electronic copies of the same, presentations during evaluation, clarifications provided by the bidder), excluding the commercial bid, submitted by the bidder is found to contain any information



on price, pricing policy, pricing mechanism or any information indicative of the commercial aspects of the bid;

- Bidders or any person acting on its behalf indulges in corrupt and fraudulent practices
- Any other condition / situation which holds the paramount interest of the Client during the overall *section process*.

**SECTION: 3**

**TERMS OF REFERENCE (ToR)**

## 1. Introduction

Poverty and Human Development Monitoring Agency (PHDMA), Bhubaneswar is an autonomous agency under the Planning & Convergence Department of the Government of Odisha. PHDMA aims at tracking the progress of poverty eradication, improving human development indicators, developing appropriate development programs and accessing & evaluating the outcome and impact of various programs and policies on the poor and vulnerable people of Odisha. The three broad working areas of PHDMA are given below:

- I. **Knowledge Management:** The collaborative movement has been made for developing professional knowledge & experience, accessing analytical research techniques and resources on inclusive socio-economic development for designing strategic and long-term policies and programs for the State Government. In view of the same, PHDMA has signed a Memorandum of Understanding (MoU) with reputed academic and research organizations.
- II. **Monitoring & Evaluation:** Use of the logic model for M&E and methods of monitoring that enable gap analysis and aid identification of catalysts for growth.
- III. **Documentation:** Documentation for branding best practices in the field of sustainable development and livelihood transformation in the State. A compilation of all such initiatives that will serve as a reference point for pro-people governance and repositories of policies and schemes that have impacted people's lives and envision the goal of transformation. Generating usable knowledge and disseminating the same to different line Departments/stakeholders to improve policy regimes and program designs.

In the last one year, a team of young professionals and officials from PHDMA visited 26 districts of Odisha with an aim of conducting narrative-based evaluation of government initiatives. Unlike the conventional monitoring and evaluation processes, the team focused more on the narratives where the people spoke about their lived realities.

PHDMA has set up three labs –Visual Anthropology Lab, Narratives & Lived Reality Lab and Data Sensing Lab with an aim of conducting more in-depth research and availing the stories and visuals collected from across the state to a larger audience.

1. The Visual Anthropology Lab with the nomenclature “Frame Tells Lab” which will monitor, evaluate & document human development through visual and video means.
2. The Narratives and Lived Reality Lab with the nomenclature “Prarambha Lab” which will monitor, evaluate and document human development through people’s own experiences and stories.
3. The Data Sensing Lab with the nomenclature “Sankhya Lab” which will monitor, evaluate and document development through analysing global, national indicators, building compendium of data as well as house its own data collection mechanism

PHDMA is looking for talented, innovative and dynamic & action research base of mindset individuals for the following positions who desire to be a part of the team that is moving from just analyzing data to seeing and sensing lives as people live it and as people narrate it.

The detailed scope of work for the positions is provided below.

## 2. Scope of the work

All role would require high level comfort with Qualitative/ Quantitative research, substantial field travel across 30 districts of Odisha. The team members will take up the following scope of work and activities towards strategic, time-bound and coordinated interventions:

### **Narrative lab, Visual Anthropology Lab, Data Sensing Lab**

- a) Need to have ability to in conduct benchmarking quantitative/qualitative research, data analysis & use data to tell stories, interpreting, and communicating data into meaningful findings through a combination of text and visualizations.
- b) Provide technical assistance in various aspects such as report writing, compilation and archiving, and presentations (from design to delivery including data preparation, analysis and insight generation).
- c) Support the identification of technologies to create analytics, visualization tools, analytical dashboards etc. and provide advice on improving the use of data grant management data usage for programmatic and policy decisions.
- d) Monitor, evaluate and document development through analyzing global, national indicators.
- e) Help the agency in building partnerships with various stakeholders, such as multi-lateral organizations, academia, civil society organizations, and private sector, focusing on identifying and scaling up innovations and developing new strategies.
- f) Work on making thematic modules on building capacities, improving participation, mobilization and empowerment of the community.
- g) Monthly collation of all work within the system and other stakeholders through narrative reports

### **Curriculum & Training Unit**

- a) Research on the principle & theories around adult learning as well as digital & physical modes of training methods.
- b) Develop curriculum, content and training modules on topics of monitoring and evaluation in coordination with PHDMA labs.
- c) Develop, review and modify training systems and processes for at scale training.
- d) Evaluate the effectiveness of training and modify techniques to ensure continuous improvements of the training session.
- e) Present training and development programs using various forms and formats including group discussion, lecture, simulations, and videos.
- f) Execute in person as well as digital training for cohorts across the state of Odisha.
- g) Liaise with partners and stakeholders to ensure entire curriculum coordination, good quality of the training content, and successful delivery of the training Programme.

### **MIS and Coordination**

- a) Document, compile and maintain work reports of various PHDMA verticals and live projects.
- b) Set up MIS processes using office management tools, data Preparation: data mapping, removing duplicate entries, removing extraneous responses, coding of open-ended responses etc. for quality data generation.
- c) Support & coordination to teams on MIS activities.

- d) Anchor logistics and coordination of PHDMA offices.
- h) Plan and conduct quality checks and data validation exercises to ensure quality of the overall management information System.
- i) Compiling and recording of all the events/activities, capturing minutes of meetings.
- j) Monthly collation of all work within the system and other stakeholders through narrative reports.

### **3. Deliverables**

#### **Narrative lab, Visual Anthropology Lab, Data Sensing Lab**

- a. Guideline for quantitative/qualitative research, data analysis & use data to tell stories, interpreting, and communicating data into meaningful findings through a combination of text and visualizations.
- b. Standard guideline for report writing, compilation and archiving, and presentations (from design to delivery including data preparation, analysis and insight generation).
- c. Tools for monitoring, evaluating and documenting initiatives comparing scheme specific, regional specific indicators with global and national indicators.
- d. Partnership building strategy document to facilitate PHDMA in collaborating with various stakeholders, such as multi-lateral organizations, academia, civil society organizations, and private sector, focusing on identifying and scaling up innovations and developing new strategies.
- e. Narrative reports on monthly basis collating of all work within the system and other stakeholders.

#### **Curriculum & Training Unit**

- f. Research principle & theories around adult learning as well as digital & physical modes of training methods.
- g. Curriculum, content and training modules on topics of monitoring and evaluation in coordination with PHDMA Labs.
- h. Process document of training systems for effectiveness of training and ensure continuous improvements of the training session.
- i. Various forms and formats including group discussion, lecture, simulations, and videos.
- j. Methods for in person as well as digital training for cohorts across the state of Odisha.

#### **MIS and Coordination**

- k. Document and work reports of various PHDMA verticals and live projects.
- l. MIS process guideline including data management principles for data mapping, removing duplicate entries, removing extraneous responses, coding of open-ended responses etc. for quality data generation, plan and conduct quality checks and data validation exercises to ensure quality of the overall management information System.
- m. Records of all the events/activities, minutes of meetings.

#### **4. Payment Schedules**

The Service providing Agency shall prepare the invoice on monthly basis at the end of every month towards the cost of service and submit at this Office address for release of payment. PHDMA will release the payment to the Service providing Agency upon receipt of the invoice within seven (7) working days.

**SECTION: 4**

**TECHNICAL PROPOSAL SUBMISSION FORMS**

**TECH – 1**  
**COVERING LETTER**  
***(ON BIDDER'S LETTER HEAD)***

*[Location, Date]*

**To**

**The Member Secretary,  
Poverty & Human Development Monitoring Agency  
Planning & Convergence Department  
Lokseva Bhawan, Odisha State Secretariat  
Bhubaneswar, PIN-751001  
Odisha**

**Subject: Selection of Agency for providing Service of Theme-based Professional for Monitoring & Evaluation in Human Development Perspective.**

Dear Sir,

I, the undersigned, offer to provide the services for the proposed assignment in respect to your Request for Proposal No. \_\_\_\_\_, Dated: \_\_\_\_\_. I hereby submitting the proposal which includes this technical proposal sealed under a separate envelope. Our proposal will be valid for acceptance up to **180 Days** and I confirm that this proposal will remain binding upon us and may be accepted by you at any time before this expiry date.

All the information and statements made in this technical proposal are true and correct and I accept that any misinterpretation contained in it may lead to disqualification of our proposal. If negotiations are held during the period of validity of the proposal, I undertake to negotiate on the basis of the proposal submitted by us. Our proposal is binding upon us and subject to the modifications resulting from contract negotiations.

I have examined all the information as provided in your *Request for Proposal (RFP)* and offer to undertake the service described in accordance with the conditions and requirements of the selection process. I agree to bear all costs incurred by us in connection with the preparation and submission of this proposal and to bear any further pre-contract costs. In case, any provisions of this RFP/ToR including of our technical & financial proposal is found to be deviated, then your department shall have rights to reject our proposal. I confirm that, I have the authority to submit the proposal and to clarify any details on its behalf.

I understand you are not bound to accept any proposal you receive.

I remain,

Yours faithfully,

**Authorized Signatory with Date and Seal:**

***REQUEST FOR PROPOSAL***



**Name and Designation:** \_\_\_\_\_

**Address of Bidder:** \_\_\_\_\_

**TECH - 2****Bidder's Organization (General Details)**

Sl. No.	Description	Full Details
1	Name of the Bidder	
2	Address for communication: Tel : Email id:	
3	Name of the authorized person signing & submitting the bid on behalf of the Bidder: Mobile No.: Email id:	
4	Registration / Incorporation Details Registration No: Date & Year. :	
5	Local office in Odisha If Yes, Please furnish contact details	Yes / No
6	Bid Processing Fee Details Amount: BC/DD No. : Date: Name of the Bank:	
7	PAN Number	
8	Goods and Services Tax Identification Number (GSTIN)	
9	Willing to carry out assignments as per the scope of work of the RFP	YES
10	Willing to accept all the terms and conditions as specified in the RFP	YES

**Authorized Signatory [In full and initials]: \_\_\_\_\_ Name and Designation with Date and Seal: \_\_\_\_\_**  
**Bidders should submit the required supporting documents as mentioned above. Non- submission of required documents as listed above will lead to rejection of the bid.**

**TECH-3**

**Bidder Organization (Financial Details)**

Financial Information in INR				
Details	FY2018 -19	FY2019 -20	FY2020-21	Average
Consulting Turnover (in Lakh)				
<p><b><i>Supporting Documents:</i></b></p> <p>Audited certified financial statements for the last three FYs (Submission of copies of Income &amp; Expenditure Statement and Balance Sheet for the respective financial years is mandatory along with this form)</p> <p><b><i>Filled in information in this format must have to be jointly certified and sealed by the CA and the authorized representative of the bidder and to be furnished in original along with the technical proposal failing which the proposal will be out rightly rejected. No scanned copy will be entertained.</i></b></p>				

---

*Signature and Seal of the Company Auditor with Date in original*

**Authorized Signatory [In full initials with Date and Seal]:** \_\_\_\_\_

**Communication Address of the Bidder:** \_\_\_\_\_

**[NB: No Scanned Signature will be entertained]**

***Bidders should submit the required supporting documents as mentioned above. Non- submission of required documents as listed above will lead to rejection of the bid.***

**REQUEST FOR PROPOSAL**

**TECH - 4**

**FORMAT FOR POWER OF ATTORNEY**

**(On Bidders Letter Head)**

I, \_\_\_\_\_, the \_\_\_\_\_ (Designation) of (Name of the Organization) in witness whereof certify that <Name of person> is authorized to execute the attorney on behalf of <Name of Organization>, <Designation of the person> of the company acting for and on behalf of the company under the authority conferred by the < Notification/ Authority order no.> Dated <date of reference> has signed this Power of attorney at <place> on this day of <day><month>, <year>.

The signatures of <Name of person> in whose favor authority is being made under the attorney given below are hereby certified.

**Name of the Authorized Representative:**

\_\_\_\_\_

**(Signature of the Authorized Representative with Date)**

**CERTIFIED:**

**Signature, Name & Designation of person executing attorney:**

*Address of the Bidder:*

Note: Board resolution confirming the Authority of the signatory to submit the proposals could also be provided as a substitute to the Power of Attorney.

**TECH - 5**

**(BIDDER'S PAST EXPERIENCE DETAILS)**

<b>Assignment Name:</b>		<b>Country:</b>
<b>Location within Country:</b>		<b>Professional Staff Provided by Your Firm/Entity(profiles):</b>
<b>Name of Client:</b>		<b>No of Staff:</b>
<b>Address:</b>		<b>No of Staff-Months:</b>
<b>Start Date:</b>	<b>Completion Date:</b>	<b>Approx. Value of Services (in INR):</b>
<b>Name of Associated Theme based professionals, If Any:</b>		<b>No of Months of Professional Staff Provided by Associated Theme based professionals: NA</b>
<b>Name of Senior Staff Involved and Corresponding Positions:</b>		
<b>Narrative Description of Project:</b>		
<b>Description of Actual Services Provided by Your Staff:</b>		

**TECH - 6**

**INFORMATION REGARDING ANY CONFLICTING ACTIVITIES AND DECLARATION THERE OF**

*Are there any activities carried out by your agency which are of conflicting nature as mentioned in Section 2: [Information to the Bidder] under Eligibility Criteria: Para (5). If yes, please furnish details of any such activities.*

If no, please certify,

**IN BIDDER'S LETTER HEAD**

I, hereby declare that our agency is not indulged in any such activities which can be termed as the conflicting activities as mentioned in **Section 2: [Information to the Bidder] under Eligibility Criteria: Para (5)**.

I, also acknowledge that in case of misrepresentation of any of the information, our proposal / contract shall be rejected / terminated by the Client which shall be binding on us.

**Authorized Signatory [In full initials with Date and Seal]:** \_\_\_\_\_

**Communication Address of the Bidder:** \_\_\_\_\_

*Bidders should submit the required supporting documents as mentioned above. Non- submission of required documents as listed above will lead to rejection of the bid.*

**TECH - 7**

**Comments and Suggestions on the Terms of Reference / Scope of Work and Counterpart Staff and Facilities to be provided by the Client**

**A: On the Terms of Reference / Scope of Work:**

*[The theme based professional needs to present and justify in this section, if any modifications to the Terms of Reference S/he is proposing to improve performance in carrying out the assignment (such as deleting some activity considering unnecessary, or adding another, or proposing a different phasing of the activities / study process modifications). Such suggestions should be concise and to the point, and incorporated in the technical proposal. Modification / suggestion will not be taken into consideration without adequate justification. Any change in manpower resources will not be taken into consideration]*

**B: On Input and Facilities to be provide by the Client:**

*[Comment here on inputs and facilities to be provided by the Client with respect to the Scope of Work and Study Implementation]*

**Authorized Signatory [In full and initials]:** \_\_\_\_\_  
**Name and Designation with Date and Seal:** \_\_\_\_\_

## **TECH - 8**

### **DESCRIPTION OF APPROACH, METHODOLOGY AND WORKPLAN TO UNDERTAKE THE ASSIGNMENT**

*[Technical approach, methodology and work plan are key components of the Technical Proposal. In this Section, bidder should explain his understanding of the scope and 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. Further, he should highlight the problems being addressed and their importance, and explain the technical approach to be adopted to address them. It is suggested to present the required information divided into following four sections]*

#### **A. Understanding of Scope, Objectives and Completeness of response**

Please explain your understanding of the scope and objectives of the assignment based on the scope of work, the technical approach, and the proposed methodology adopted for implementation of the tasks and activities to deliver the expected output(s), and the degree of detail of such output. ***Please do not repeat/copy the ToR here.***

#### **B. Description of Approach and Methodology:**

- Key guiding principles for the Theme-based Professional Team
- Understanding of the concept of institutional set up
- Review existing and Proposed framework
- Information matrix
- Highlight any challenges anticipated in delivering the expected outputs
- Approaches to overcome the challenges and meet the requirements of the assignment.
- Review Stakeholders Engagement/involvement
- Establishing system for Implementation Effectiveness
- Monitoring & Evaluation mechanism of programmes and interventions for better outcomes
- Check Validity and Reliability of results/outcome
- Dissemination of results to Policy Makers and other audiences
- Any other issues mentioned in the ToR

#### **C. Methodology to be adopted:**

Explaining of the proposed methodologies to be adopted highlighting of the compatibility of the same with the proposed approach. This includes:

- Overall research design for analysis and Baseline documentation including thematic, goal wise, sector or area wise reports, presentation and other documents to be developed during the project period
- checklist capturing specific information areas would be developed
- Assessment Framework (process, output-impact log frame)
- Understanding and Appreciation of the assignment
- Desk research on primary and secondary data and interaction with primary and secondary stakeholders
- Qualitative and quantitative suggestive tools for data collection and analysis
- Field process protocol control
- Analysis of field data survey and preparation of report



- Suggestive note with parameters for guiding the programme implementing Departments/agencies to improve its efficiency, efficacy and targeting in each thematic area of interventions
- Any other issues mentioned in the ToR

**D. Staffing and Study Management Plan:**

The bidder should propose and justify the structure and composition of the team and should enlist the main activities under the assignment in respect of the Key Professionals responsible for it. Further, it is necessary to enlist of the activities under the proposed assignment with sub- activities (week wise). (Graphical representation)

**Authorized Signatory [In full and initials]:** \_\_\_\_\_

**Name and Designation with Date and Seal:** \_\_\_\_\_

***NB: Bidders are requested to furnish the above information limiting it up to 5-7 pages only with Arial Font Size-10.***

**TECH - 9**

**Format of Curriculum Vitae (CV) for Proposed Key Professional**

**1. Proposed Position:**

*[For each position of key professional separate form Tech B-6 will be prepared]*

**2. Name of Firm:**

**3. Name of Staff:**

**4. Date of Birth:**

**5. Years with Firm:**

**6. Nationality:**

**7. Education:**

*[Indicate college/university and other specialized education of staff member, giving names of institutions, degrees obtained, and dates of obtainment]*

**8. Membership in Professional Associations:**

**9. Other Trainings:**

**10. Countries of Work Experience:**

**11. Languages:**

*[For each language indicate proficiency: excellent, good, fair, or poor; in speaking, reading, and writing]*

**12. 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. For experience in **last ten years**, also give types of activities performed and Client references, where appropriate as per the prescribed format given below]*

<i>From [Year]</i>	<i>To [Year]</i>
<i>Employer Name:</i>	
<i>Position Held:</i>	
<i>Details of the Task Assigned</i>  <i>[List all tasks to be performed under this Assignment/job]</i>	

**13. Work Undertaken that Best Illustrates Capability to Handle the Tasks Assigned**

*[Among the Assignment/jobs in which the staff has been involved, indicate the following information for those Assignment/jobs that best illustrate staff capability to handle the tasks listed under point 12.]*

<i>Name of the Project</i>	
<i>Year</i>	
<i>Location</i>	
<i>Name of the Client</i>	
<i>Project Feature</i>	
<i>Position Held</i>	
<i>Activities Performed</i>	

**Certification:**

*I, the undersigned, certify that to the best of my knowledge and belief that this CV correctly describes my qualifications and past experiences. I will undertake this assignment for the full project duration in terms of roles and responsibilities assigned in the technical proposal or any agreed extension of activities thereof. I understand that any misstatement herein leads to disqualification of CV.*

**Date:**

*Signature of Key Professional with Date* \_\_\_\_\_

**Authorized Signatory [In full and initials]:** \_\_\_\_\_

**Name and Designation with Date and Seal:** \_\_\_\_\_

**NB: CV writeup restricted to 3 pages only with quality information relevant to the key professional requirements. The CVs needs to be jointly signed by the proposed professional and the authorized representative of the Bidder.**

**TECH-10**

**PROPOSED WORKPLAN TO CARRY OUT THE ASSIGNMENT**

<i>Week</i> →	1	2	3	4	5	6
<i>Sequence of Activities / Sub Activities</i>						
↓						

*Indicate all main activities / sub activities of the proposed assignment including delivery of reports (Inception, Periodic Reports) and other associate sub-periodic activities*

**Authorized Signatory [In full and initials]:** \_\_\_\_\_

**Name and Designation with Date and Seal:** \_\_\_\_\_

**TECH - 11**

**BID SECURITY DECLARATION IN LIEU OF BID SECURITY**

Date: \_\_\_\_\_

To,

**The Member Secretary,  
Povert & Human Development Monitoring Agency,  
Planning & Convergence Department  
Lok Seva Bhawan, Odisha State Secretariat Bhubaneswar,  
PIN-751001  
Odisha**

I/We understand that, according to the RFP conditions, bids must be supported by a Bid Security Declaration in lieu & Bid Security

If I/We declare that if we withdraw or modify the Bids during the period of validity etc.

I/We will be suspended for the time specified in the RFP and if I/We are awarded the contract and fail to sign the contract or fail to submit a performance security before the deadline defined in the request for proposals (RFP) document, they will be suspended for the period of time specified in the request for proposals document from being eligible to submit Bids/Proposals for contracts with the Procuring Entity.

Signed:

in the capacity of: (insert legal capacity of person signing the Bid Securing Declaration) Dated

on \_\_\_\_\_ day of (insert date of signing)

**SECTION: 5**

**FINANCIAL PROPOSAL**

**FIN-1**

**COVERING LETTER**

**(In Bidders Letter Head)**

*[Location, Date]*

To

**The Member Secretary,  
Povert & Human Development Monitoring Agency,  
Planning & Convergence Department  
Lok Seva Bhawan, Odisha State Secretariat  
Bhubaneswar, PIN-751001  
Odisha**

**Subject: Selection of Agency for providing Services of Theme-based Professionals for Monitoring & Evaluation in Human Development Perspective [FINANCIAL PROPOSAL]**

Sir

I, the undersigned, offer to provide the consulting services for *[Insert title of assignment]* in accordance with your Request for Proposal No. \_\_\_\_\_, Dated: \_\_\_\_\_. Our attached Financial Proposal is for the sum of *[Insert amount(s) in words and figures\*]*.

The above quoted amount is inclusive of the taxes applicable as per GST Act. I do hereby undertake that, in the event of acceptance of our bid, the services shall be provided in respect to the terms and conditions as stipulated in the RFP document.

Our financial proposal shall be binding upon us subject to the modifications resulting from contract negotiations, up to expiration of the validity period of the proposal of **180 days**. I have carefully read and understood the terms and conditions of the RFP and do hereby undertake to provide the service accordingly.

I understand that you are not bound to accept any proposal you receive. I

remain,

Yours faithfully,

**Authorized Signatory *[In full and initials]*:**

**Name and Designation of Signatory with Date and Seal:**

**Address of the Bidder:**

—

\* Amount must match with FIN-2 Summary of financial Proposal, FIN-3- Breakdown of Remuneration of Key Professionals, FIN-4- Breakdown of Overhead Expenses

***REQUEST FOR PROPOSAL***

**FIN-2**

**SUMMARY OF FINANCIAL PROPOSAL**

<b>Name of the Assignment :</b>				
<b>Sl. No.</b>	<b>Fee Particulars</b>	<b>Amount in INR</b>		
<b>A</b>	<b>Remuneration for Key Professionals</b>			
	<b>Description of Manpower</b>	<b>Qty</b>	<b>Monthly Rate (in INR)</b>	<b>Total</b>
1	Professional-Narrative Based Evaluation (Oral)	1		
2	Professional-Visual Anthropology (visual)	1		
3	Professional- Data Sensing	1		
4	Professionals- Curriculum Development & Training Execution	1		
5	Coordinator- Documentation, Reporting & MIS	1		
<b>B</b>	<b>Total Remuneration for Key Professionals</b>			
<b>C</b>	Overhead			
<b>D</b>	<b>Consulting Fee(B+C)</b>			
<b>E</b>	Taxes applicable as per GST Act@ _____% of Consulting Fee (D)			
<b>Grand Total (INR) (D+E)</b>				
<b>In Words</b>				

**NB:**

- Bidders shall submit the financial proposal as per the prescribed format given above in both figures and words, and signed by the Authorized Representative. In the event of any difference between figures and words, the amount indicated in words shall prevail.*
- Taxes will be paid by the Client as per the applicable rate under GST Act from time to time. Consultancy fee proposed for the assignment shall remain fixed till completion of the contract.*

**Authorized Signatory [In full and initials]:** \_\_\_\_\_

**Name and Designation with Date & Seal:** \_\_\_\_\_



**FIN-3**

**DETAIL BREAK-UP OF FEE OF KEY PROFESSIONALS**

<b>Sl.No</b>	<b>Position</b>	<b>Requirement</b>	<b>Name of Key Person</b>	<b>Monthly Fee in INR</b>	<b>Yearly Fee in INR</b>	<b>Total Fee in 36 months (INR)</b>
1	Professional-Narrative Based Evaluation (Oral)	1				
2	Professional-Visual Anthropology (visual)	1				
3	Professional- Data Sensing	1				
4	Professionals- Curriculum Development & Training Execution	1				
5	Coordinator- Documentation, Reporting & MIS	1				
<b>Total</b>						
<b>In Words</b>						

**Authorized Signatory [In full and initials]:** \_\_\_\_\_

**Name and Designation with Date & Seal:** \_\_\_\_\_

**FIN-4**

**BREAKDOWN OF OVERHEAD EXPENSES**

<b><u>Sl.No</u></b>	<b><u>Description</u></b>	<b><u>Unit</u></b>	<b><u>Quantity</u></b>	<b><u>Unit Price in INR</u></b>	<b><u>Total Amount in INR</u></b>
1					
2					
3					
<b>Grand Total in INR</b>					
<b>In Words</b>					

**Authorized Signatory [In full and initials]:** \_\_\_\_\_

**Name and Designation with Date& Seal:** \_\_\_\_\_

**SECTION - 6**

**ANNEXURE**

**BID SUBMISSION CHECK LIST**

Sno	Description	Submitted (Yes/No)	Page No.
<b>TECHNICAL PROPOSAL (ORIGINAL + 1COPY)</b>			
1	Filled in Bid Submission Check List (ANNEXURE-I)		
2	Covering Letter (TECH -1)		
3	Bid Processing Fee of <b>Rs. 10,000/-</b> in form to DD/ BC		
4	Copy of Certificate of Incorporation/ Registration of the Bidder		
5	Copy of PAN		
6	Copy of Goods and Services Tax Identification Number (GSTIN)		
7	Copies of IT Returns for the last 3 AYS ( <b>16-17, 17-18 &amp; 18-19</b> )		
8	General Details of the Bidder (TECH - 2)		
9	Financial details of the bidder (TECH - 3) along with all the supportive documents such as copies of Profit – Loss Statement and Balance Sheet for the concerned period		
10	Power of Attorney (TECH - 4) in favour of the person signing the bid on behalf of the bidder.		
11	List of completed assignments of similar nature (Past Experience Details) (TECH - 5) along with the copies of work orders for the respective assignments		
12	Self-Declaration on Potential Conflict of Interest (TECH- 6)		
13	Comments and Suggestions (TECH – 7)		
14	Description of Approach, Methodology & Work Plan (TECH - 8)		
15	CV of Key Professionals (TECH – 9)		
16	Work Plan (TECH – 10)		
17	Bid Security Declaration Template (TECH -11)		
<b>FINANCIAL PROPOSAL (ORIGINAL)</b>			
1	Covering Letter (FIN-1)		

**Undertaking:**

- All the information have been submitted as per the prescribed format and procedure.
- Each part has been separately bound with no loose sheets and each page of all the two parts are page numbered along with Index Page.
- All pages of the proposal have been sealed and signed by the authorized representative.

**Authorized Signatory [In full and initials]:** \_\_\_\_\_

**Name and Designation with Date and Seal:** \_\_\_\_\_

**PERFORMANCE BANK GUARANTEE FORMAT**

To,

**The Member Secretary,  
Povert & Human Development Monitoring Agency,  
Planning & Convergence Department  
Lok Seva Bhawan, Odisha State Secretariat  
Bhubaneswar, PIN-751001  
Odisha**

WHEREAS ..... (Name and address of the Theme based professional) (hereinafter called “the Theme based professional”) has undertaken, in pursuance of RFP no..... dated ..... to undertake the service ..... (description of services) (herein after called “the contract”).

AND WHEREAS it has been stipulated by \_\_\_\_\_(Name of the Client) in the said contract that the Theme based professional shall furnish you with a bank guarantee by a scheduled commercial bank recognized by you for the sum specified therein as security for compliance with its obligations in accordance with the contract;

AND WHEREAS we have agreed to give the supplier such a bank guarantee;

NOW THEREFORE we hereby affirm that we are guarantors and responsible to you, on behalf of the Theme based professional, up to a total of ..... (amount of the guarantee in words and figures), and we undertake to pay you, upon your first written demand declaring the theme based professional to be in default under the contract and without cavil or argument, any sum or sums within the limits of (amount of guarantee) as aforesaid, without your needing to prove or to show grounds or reasons for your demand or the sum specified therein.

We hereby waive the necessity of your demanding the said debt from the theme based professional before presenting us with the demand.

We further agree that no change or addition to or other modification of the terms of the contract to be performed there under or of any of the contract documents which may be made between you and the theme based professional shall in any way release us from any liability under this guarantee and we hereby waive notice of any such change, addition or modification.

This performance bank guarantee shall be valid until the .....day of .....,

Our branch at Bhubaneswar (Name & Address of the Bank) is liable to pay the guaranteed amount depending on the filing of claim and any part thereof under this Bank Guarantee only and only if you serve upon us at our Bhubaneswar branch a written claim or demand and received by us at our Bhubaneswar branch on or before Dt.....otherwise bank shall be discharged of all liabilities under this guarantee thereafter.

.....  
**(Signature of the authorized officer of the Bank)**  
.....  
**Name and designation of the officer**  
.....  
.....  
**Seal, name & address of the Bank & Branch**