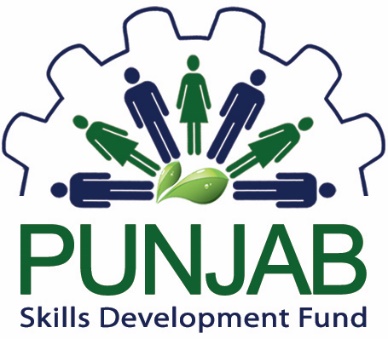
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| --- |
| **Punjab SKills Development Fund** |
| **Tender Document** |
| **“**Hiring of a Research Firm for undertaking Brand Health & Positioning Survey for PSDF**”** |
|  |
|  |
|  |



**Submission Date for Sealed Bids:**

**10 th November,2017**

**11:00 AM**

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

Phone: +92-42-35752408-10

Fax: +92-42-35752190

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# Invitation to bids

Punjab Skills Development Fund (PSDF) is a section 42, not-for-profit Company set up under the Companies Ordinance 1984 by the Government of the Punjab. Sealed bids/proposals will be invited from established PR Firms (hereafter called as bidders) for Press and Public Relations management on behalf of PSDF. All interested and eligible bidders are requested to go through the complete document and provide the required information and documents mentioned in this document.

# Instruction to bidders

The selection of the bidding Research Firms will base on Quality Cost Based Selection Method. PSDF will adopt Two Stage bidding procedure. In the first instance, the bidders shall submit according to the required specifications, a technical proposal without quoting price. The technical proposal shall be evaluated in accordance with the specified evaluation criteria and will be called for presentations and may be discussed with the bidders regarding any deficiencies and unsatisfactory technical features. After presentations , all the bidders shall be permitted to revise their respective technical proposals to meet the requirements of the PSDF. The bidders, whose technical proposals or bids have not been rejected and who are willing to confirm their bids to the revised technical requirements of PSDF, may submit a revised technical proposal.

The revised technical proposal will be evaluated on the basis of PSDF evaluation criteria and eligible and technically qualified bidders will be asked to submit the financial proposal. Financial proposal based upon quality cost factor , bid will be accepted.

The firms who will get minimum 65 marks in technical evaluation will be called for financial bid opening and contract negotiations.

# Conditions for eligibility

The successful bidder, fulfilling the following criteria, will be considered as an eligible bidder for the evaluation process;

1. Minimum 5-8 years of proven experience of providing research services, preferably to multinationals, FMCG autonomous bodies/international clients. Documentary proof (copies of contract or work order by clients or delivery receipts) should be furnished.
2. The Research Firm must have local presence with an office in Lahore,Karachi Islamabad, preferably in Lahore. (office address on singed letter head)

Regular tax payer

1. Attach copy of tax returns of last year (Attach Copies)
2. Evidence of company’s registration / incorporation (Copy required)
3. Affidavit on stamp paper, declaring that the company is not black listed by any Govt. agency / authority (Original required)
4. NTN/, GST, PST (if applicable) registration (Copy required)

Kindly fill all annexures required for the above qualification criteria and attach the supporting documentary evidences as mentioned in each annexure;

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

# Terms of Reference

**The Study**

Till date, PSDF has only utilized its resources to issue tender notices and solicitations to procure third-party services and to advertise project-wise schemes and available vacancies. Advertisements and campaigns have not been introduced through the mass media for corporate branding purposes, leading to the following key problems:

* Lack of awareness about PSDF and the work being done under PSDF’s corporate banner;
* Unable to reach the target audience and the masses with our message, that projects and enhances PSDF’s corporate identity.

The Marketing & Communications (M&C) department at PSDF has also been set-up very recently. After which, coordinated efforts guided by a strategy have been taken up by the department to improve and renew PSDF’s corporate brand image. Hence, the need to conduct a research study to determine PSDF’s brand health was realized in order to guide future decisions and strategies.

Essentially, the questions that we are trying to address through this study, are as follows:

1. PSDF has been successfully achieving milestones for the last five years, but how many people know about us and our work?
2. Those who know about us, do they feel PSDF has a distinct identity? If yes, how do they perceive PSDF?

The purpose of undertaking this survey is to understand and determine the brand health starting point for the 360-degree campaign that the M&C department wishes to launch during the year 2017-2018.

**Objective**

The overarching objective of this study is to develop an understanding on the following key points (with relevance to PSDF):

* + Category Understanding to define PSDF’s competitive environment with relevance to branding, positioning and segmentation, and category management purposes;
  + Measure the level of awareness and to identify the need gaps;
  + Evaluate the effectiveness of PSDF’s current tagline and key messages;
  + Understand the usage dynamics, trial and key influencing attributes assigned to PSDF by its consumers;
  + Build a profile of PSDF’s consumers and non-consumers;
  + Gather information to determine the course of future conversion strategy for non-consumers.

**End Goal**

The results of this research will then be utilized to accomplish the following tasks:

1. Revamp branding guidelines and all external touchpoints for PSDF;
2. Create general awareness about PSDF as a brand;
3. Create a distinct identity (including the logo, tagline, messages, merchandize, etc.) for PSDF in the market – i.e., a fund provider as opposed to skills provider;
4. Secure desired positioning for PSDF’s products/offers (programs, schemes, etc.);
5. Improve communication with our stakeholders, through targeted and meaningful messages. Also, put a mechanism in place to measure the impact of this exercise;
6. Build positive word of mouth marketing for PSDF by utilizing the most effective mediums of communication.

In order to accomplish the above mentioned goals and objectives, the Marketing & Communications department at PSDF requires the services of a well-established research firm to gather, collate and analyse the required information. Specific details for the study are included below:

**Timeline**

October – November 2017

**Profile of Target Respondents**

* **Major Stakeholders:** Potential and Current Trainees, Training Service Providers (TSPs), Industries, Employers, Donor Agencies and the public at large.
* **Geographic Coverage:** 14 districts of Punjab, including: Lahore, Sheikhupura, Faisalabad, Chiniot, Sargodha, Gujranwala, Narowal, Khanewal, Vehari, Bahawalnagar, Bahawalpur, Lodhran, Muzaffargarh, and Rahim Yar Khan.
* **Male vs Female Ratio:** 60% Males and 40% Females
* **SEC:** B, C and D
* **Sampling Preference:**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Stakeholder/s** | **Trainees** | **TSPs/Industries** | **Employers** | **Donor Agencies** | **General Public** |
| **Selection Criterion** | Age bracket (18-29) | Trade(s) | Sector(s)/Trade(s) | Area of Interest, i.e. Skills Development | Random; willingness to respond |

Technical Approach and Methadology

In this chapter you should explain your understanding of the objectives and scope of job/TORs of the assignment, approach to provide these services, and methodology for carrying out the assignment.

You may highlight the problems being anticipated by you in this assignment and their importance and explain the technical approach you would adopt to address them. You may also be invited for a presentation on your proposed methodology.

**Methodology**

The qualifying research firm will be required to suggest appropriate qualitative and quantitative research methods to gather data and facilitate the M&C department in answering the following questions for PSDF’s current brand health and positioning in the market:

**Brand Awareness:**

* + - What skills development organizations are you aware of?
    - What training opportunities are being offered by the various organizations that you have mentioned?
    - How did you come across these organizations?
    - What comes to your mind when I say Punjab Skills Development Fund / PSDF? (Gauge present personality of PSDF)
    - What is your view on the existing look and feel of PSDF as a brand?

**Brand Image:**

* + - Imagine if PSDF is a person, what is his/her personality going to be like? What makes you say that?
    - What car will s/he drive?
    - How will s/he deal with other people?
    - What kind of relationship will s/he have with you?

**Tagline Testing:**

* + - Spontaneous reactions?
    - Reliability and believability
    - Is there a connect?

**Drivers for Selection:**

* + - **For Trainees:** What factors would you consider when deciding to enroll for a training course to learn a new skill?
    - **For Employers:** What factors would you consider when deciding to hire potential employees?
    - **For Training Service Providers:** What factors would you consider when deciding to form an association with PSDF?
    - **For Donors:** What factors would you consider when deciding to fund a skills development organisation?
    - **For Employees:** What factors would you consider when deciding to apply for a job at PSDF/join PSDF?
    - Which is the most important factor and why?

**PSDF’s Competitors in the Market:**

* + - Reactions to alternate brand names? (PVTC, TEVTA, NAVTTC, etc.)
    - Barriers and motivators

**Previous Campaigns:**

* + - Do you recall any campaigns/schemes launched by PSDF?
    - Which campaign do you recall? Do you remember the name, image or message?
    - What was the level of efficacy in your opinion of that campaign?

**Research Instruments**

The qualifying research firm would be required to work with the M&C team to develop appropriate data collection instruments, in accordance with the finalized methodology.

**Work Plan**

Based on the information above, the qualifying research firm must design and share a work plan, highlighting what time frame would be required to gather enough quality data for meeting the study objectives.

**Study Deliverables/Outputs**

By the closing period of this study, PSDF must have a thorough understanding on the following:

1. To understand PSDF’s current & future direction as well as set the precedence to measure, monitor, manage its brand equity.
2. To tap into the following elements of PSDF’s identity and answer the questions below in light of the objectives defined above:
3. **Brand Offering:**

* Does our brand occupy a unique position in our relevant stakeholders’ mind?
* What are the key attributes that are important and will strengthen our brand’s equity?

1. **Brand Communication:**

* Need insights of media consumption, habits of our current and potential stakeholders.
* Are the key messages marketed being recalled? How strong has our tagline been?
* Which channels of communication are important to communicate our brand message?

1. **Brand Execution:**

* What should be our brand’s core objectives before and after the campaign?
* What are the key activities our brand should focus on now?
* What elements should be kept in mind while execution of the above to roll out a smooth conversion plan?

# Guidelines

1. Only short-listed applicants fulfilling the eligibility criteria will be considered for technical evaluation.
2. All documents and information received by PSDF from applicants will be treated in strictest confidence.
3. Documents submitted to PSDF will not be returned.
4. All expenses related to participation in this bidding document shall be borne by the applicants.
5. Documents shall be submitted in hard copies in a sealed envelope marked as “TECHNICAL PROPOSAL” as hard copy in a sealed envelope for **“**Hiring of a Research Firm for undertaking Brand Health & Positioning Survey.” The envelope containing hard copies of technical proposal shall be received on the postal address given below.
6. Sealed Technical proposals received thereafter will not be accepted.
7. PSDF reserves the right to request submission of additional information from applicants in order to clarify/further understand aspects of technical proposal, if required.
8. PSDF reserves the right to verify any information provided by the applicants.
9. The Competent authority may reject all bids or proposals at any time prior to the acceptance of bid or proposal.The procuring agency shall upon request communicate to any bidder,the grounds for its rejection of all bids or proposals.but shall not be required to justify those grounds.
10. Questions about this technical proposal can be made only in writing: a letter or an e-mail and must be asked by or before COB 3rd November, 2017. For any other related information please contact the undersigned.

Associate Marketing and Communications

Punjab Skills Development Fund

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

E-mail:Aneeqa.zaheer@psdf.org.pk

Phone: +92-42-35752408-10

Fax: +92-42-35752190

# Technical evaluation criteria

This document is governed by the procedure approved by PSDF management. The technical proposal of eligible organisations will be evaluated against the requirements specified in the section, Terms of Reference (attached as annexure – D).

1. **Type of Contract**

Contract will be a time bound task base contract that includes but not limited to the scope of job and terms of references. Contract will be valid for one year from date of signing of contract. Contract may be extended for another term/terms based on same cost and same terms & conditions mutually agreed by both parties (bidder and PSDF).

1. Pre-proposal Meeting

A pre-proposal meeting will be conducted on 3rd November , 2017 at 3:00 PM in PSDF office for clarification of queries and more understating of the project.

# Declaration

Kindly provide the declaration as per format provided below at the end of proposal.

I, \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ hereby declare that:

* all the information provided in the technical proposal is correct in all manners and respects
* and I am duly authorised by the Governing body/Board/Management to submit this proposal on behalf of

|  |  |
| --- | --- |
| Name |  |
| Designation |  |
| Signature |  |
| Date and Place |  |

# Submission of Bids (Technical Proposal)

Complete bid containing technical proposal along with all required information & documentary evidences may be delivered to Procurement, PSDF, 21-A, H-Block, Dr. Mateen Fatima Road Gulberg-II Lahore and submitted before 11:00 AM on 10th Novemebr, 2017. Technical proposals will be publically opened on the same day i.e. 10th November, 2017 at 11:30 AM in the presence of firm’s representatives who wish to attend the bid opening

.

**Cover Letter for the Submission of Technical Proposal**

[*Firm letterhead*]

[*Date*]

To

Chief Executive Officer

[Address mentioned in Guide lines]

**Re:** Technical Proposal in respect of [Insert title of assignment]

Dear Sir,

We offer to provide the Services for [Insert title of assignment] in accordance with your Tender for Proposal dated [Insert Date of Tender advertised]. We hereby submit our technical Proposal including the required documents in a sealed envelope.

We hereby declare that all the information and statements made in these proposals are true and accept that any misinterpretation contained therein may lead to our disqualification. Our proposal is binding upon us and subject to the modifications resulting from contract negotiations. We undertake that we will initiate the services as per the client’s request if our proposal is accepted. We understand that you are not bound to accept any or all proposals you receive.

Thank you.

Yours sincerely,

Signature

Name and title of signatory:

**Important Note:** The competent authority may reject all bids or proposals at any time prior to the acceptance of a bid or proposal. PSDF shall upon request communicate to any bidder, the grounds for its rejection of all bids or proposals, but shall not be required to justify those grounds. The bids should be submitted in sealed envelope clearly mentioned “**TECHNICAL AND FINANCIAL PROPOSALS FOR HIRING OF A RESEARCH FIRM FOR UNDERTAKING BRAND HEALTH & POSITIONING SURVEY.”**

# Annexures

## Annex – A

|  |  |  |  |
| --- | --- | --- | --- |
| Organization Information | | | |
| **S #** | **Required Information** | **Response** | |
| 1 | Legal name of the organization |  | |
| 2 | Year of Registration / Establishment of the Organisation |  | |
| 3 | National Tax Number |  | |
|  | General / Punjab Sales Tax Number |  | |
| 5 | What is the legal status of your organisation? Tick the relevant box (one box only). (Attach Copy/Copies of Registration Certificate/s) | Public Sector Organisation |  |
| Section 42 Company |  |
| Public Ltd. Company |  |
| Private Ltd. Company |  |
| Private Partnership Firm |  |
| Others (Please specify) |  |
| 6 | Name and designation of ‘Head of Organization’ |  | |
| 7 | Mobile: |  | |
| Phone/s: |  | |
| Email: |  | |
| Fax: |  | |
| Address of organization: |  | |
| Website address: |  | |
| 8 | Name and designation of ‘Contact Person’: |  | |
| Phone/s: |  | |
| Mobile: |  | |
| Email: |  | |
| Fax: |  | |
|  | Address of printing set up |  | |
|  | Phone/s: |  | |
|  | Mobile: |  | |
|  | Email: |  | |
|  | Fax: |  | |

## Annex – B

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Eligibility Response Checklist** | | | | |
| **Sr. No.** | **Necessary Eligibility Information** | **Response/Elaboration** | | |
| 1 | 1. Minimum 5 to 8 years’ experience of proven experience of providing research services, preferably to multinationals, FMCG autonomous bodies/international clients. Documentary proof (copies of contract or work order by clients or delivery receipts) should be furnished |  | Copies of work orders or delivery receipts Attached | |
|  | Copies Not Attached | |
| 2 | The supplier or company must have local presence, registered office in Lahore,Karachi,Islamabad Faislabad |  | Office address on signed letter head Attached | |
|  | Not Attached | |
|  | Not applicable. Public sector organisation | |
| 3 | Regular tax payer  Attach copy of tax returns of last year | Copies Attached | |  |
| Not Attached | |  |
| 4 | Certificate of Registration / Incorporation (Copy required) |  | Copy Attached | |
|  | Not Attached | |
| 5 | Has your firm ever blacklisted by any government authority or any bi-lateral/multi-lateral financial institution?  (MUST attach an undertaking by your firm’s authorised person with this document) |  | We solemnly declare that our organization or any member of consortium has never been suspended/debarred or blacklisted. | |
|  | Our organization has been blacklisted once or more than once. | |
| 6 | Mention National Tax Number (NTN) or General / Punjab Tax Number (GST, PST) in the name of Organization and provide a copy of registration |  | Copy Attached | |
| Copies not Attached | |
| 7 |  |  |  | |
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## Annex – C

|  |  |  |
| --- | --- | --- |
| **Relevant Experience** | | |
| **Sr. #** | **Required Information** | **Response**  **(Please provide exact information with organization name, location/s and duration)**  Provide data in sequence given below |
| 1 | Name of Organizations with addresses |  |
|  |
|  |
|  |
|  |
| 2 | Start and end dates of providing research services (For example – Jan 2005 to September 2013) |  |
|  |
|  |
|  |
|  |
| 3 | Number of research services provided |  |
|  |
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## Annex – D

**Technical Evaluation Criteria**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | | | | |
| **S. No.** | **Descriptions** | **Total Points** | **Categorized Points** | |  | | --- | | **Remarks**  (Attachment of relevant evidence in each case is mandatory. In case of non-compliance no mark will be awarded) | |
| **1** | **Client Portfolio** | **15** |  | Documentary proof (copies of contract or work order or contact details of clients) should be furnished. |
|  | Currently working with/for at least 25+ local, international, FMCG and/or MNC clients |  | 15 |
| Currently working with/for more than 15 locals, international, FMCG and/or MNC clients but less than 20 |  | 10 |
| Currently working with/for more than 10 locals, international, FMCG and/or MNC clients |  | 0 |
| **2** | **Relevant Experience** | **20** |  | Documentary proof (copies of contract or work order or contact details of clients) should be furnished. |
|  | Conducted 10+ perception and/or brand health & positioning surveys (in English & Urdu) across Punjab |  | 20 |
| Conducted 5+ perception and/or brand health & positioning surveys (in English & Urdu) across Punjab |  | 10 |
| Undertaken several surveys (in English & Urdu) across Punjab but not perception and/or brand health & positioning surveys |  | 0 |
| **3** | **Team Health** | **10** |  | Documentary proof (company organogram) should be furnished. |
|  | Number of permanent employees is between 25-40 |  | 10 |
| Number of permanent employees is between 10-35 |  | 5 |
| Number of permanent employees is less than 25 |  | 0 |
| **4** | **Relevant Qualifications** | **25** |  | Documentary proof (profiles of the proposed team, years of experience and details of relevant projects handled in the last 05 years) should be furnished. |
|  | Proposed team has more than 15 years of collective experience in conducting surveys and has handled 10+ similar projects in the last 5 years |  | 25 |
| Proposed team has more than 10 years of collective experience in conducting surveys and has handled 7+ similar projects in the last 5 years |  | 18 |
| Proposed team has more than 5 years of collective experience in conducting surveys and has handled 5+ similar projects in the last 5 years |  | 10 |
| Proposed team has less than or equal to 5 years of collective experience in conducting surveys but no relevant experience |  | 0 |
| **5** | **Data Collection** | **15** |  | Documentary proof (affidavits with undertaking and detailed description of the data collection mechanism) should be furnished. |
|  | Firm has an in-house data collection department |  | 15 |
| Firm does not have an in-house data collection department |  | 0 |
| **6** | **Quality Control** | **15** |  | Documentary proof (affidavits with undertaking and detailed description of the quality control mechanism) should be furnished. |
|  | Firm has an in-house quality control department |  | 15 |
| Firm does not have an in-house quality control department |  | 0 |
| **Total Points Awarded** | | **100** |  |  |

## Annex – E

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Key Management Staff of Company | | | | |
| Sr # | Name of Management Staff | Designation | Area of Expertise | Number of years in company |
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May like to add more columns