

**PUNJAB SKILLS DEVELOPMENT FUND**



**BIDDING DOCUMENT**

**Microfinance Sales Officer Training Programme 2019**

**(Instructions, Data Sheet & TORs)**

**MAY 2019**

## CONTENTS OF BIDDING DOCUMENT

PART	SECTION	CONTENTS
<b>PART 1</b>	<b>SECTION 1</b>	INSTRUCTIONS TO TRAINING PROVIDERS <i>For Information of Training Providers</i>
	<b>SECTION 2</b>	DATA SHEET <i>For Information of Training Providers</i>
<b>PART 2</b>	<b>SECTION 3</b>	ORGANIZATION'S PROFILE
		TECHNICAL PROPOSAL
<b>PART 3</b>	<b>SECTION 4</b>	FINANCIAL PROPOSAL
<p><b><i>All these parts are for the information of Training Provider. Bidding Document should be prepared after careful study of the provided information.</i></b></p>		

## **PART 1**

### **INSTRUCTIONS TO TRAINING PROVIDERS**

**NOTE: Pre-Proposal conference will be conducted in order to guide the organizations for preparing the Bidding Document effectively. The interested organizations should get them registered before 22<sup>nd</sup> May 2019 through an email on [Sherjeel.usmani@psdf.org.pk](mailto:Sherjeel.usmani@psdf.org.pk). Date and venue of the conference will be shared through an email confirming the registration.**

## INSTRUCTIONS TO TRAINING PROVIDERS

### 1. DEFINITIONS

- “Bidding Document” means set of documents prepared by PSDF which consists of “Instructions to Training Providers”, TORs and forms for providing information about profile of the organization and Technical & Financial Proposals.
- “Board” means Board of Directors of Punjab Skills Development Fund, a company incorporated under section 42 of the Companies Ordinance 1984.
- “Client” means Punjab Skills Development Fund (PSDF).
- “Contract” means the contract signed by PSDF and Training Provider along with all attached documents thereto.
- “Data Sheet” means such part of the Instructions to Training Providers used to reflect specific conditions.
- “Day” means calendar day.
- “Establishment” means an Organization, whether industrial, commercial, agriculture or otherwise as defined in the Provincial Employees’ Social Security Ordinance, 1965.
- “Financial Proposal” means that part of the proposal which provides details about cost of the proposed training.
- “Government” means the Government of the Punjab.
- “Industry” means any business, trade, undertaking, manufacturing etc. as defined in the Provincial Employees’ Social Security Ordinance, 1965.
- “Instructions to Training Providers” means the document which provides potential Training Providers with all information needed to prepare their proposals.
- “Personnel” means temporary or permanent staff employed by the Training Provider and assigned to perform the Services or any part thereof.
- “Professional Staff” includes management team, training and/or placement staff of Training Provider.
- “Proposal” means the entire set of documents consisting of Organization’s Profile, Technical and Financial Proposals submitted by an organization.
- “Services” means one or more of the services related to delivery of training as specified in the Data Sheet and ancillary activities to be performed by the Training Provider in pursuance of the Contract.
- “Target Group” refers to potential candidates for admission who fulfill the eligibility requirements defined in the Data Sheet.
- “Technical Proposal” means that part of the proposal which provides information about the technical aspects of the proposed training.
- “Terms of Reference” (TOR) means that part of Bidding Document which explains the scope of work, activities, tasks to be performed, respective responsibilities of the Client & the Training Provider as well as expected results and deliverables of the assignment.
- “Trainee” means any eligible individual who is selected for training by the Training Provider.
- “Training Provider” means an organization meeting the eligibility conditions as mentioned in Data Sheet and selected in accordance with the criteria set forth for the purpose.

## 2. FOREWORD

Punjab Skills Development Fund (PSDF) is a section 42, not-for-profit Company, established under the Companies Ordinance 1984 by the Government of Punjab, with the objective to provide funding to Training Providers (TPs) for the training of poor and vulnerable people. PSDF funds vocational training and intends to improve income generation capacity of the residents of Punjab. PSDF uses competitive bidding method for engaging Training Providers. Procurement rules are available on PSDF website for detail review. Proposals of short-listed organizations are assessed on the basis of quality and cost selection methodology.

This scheme namely "**Microfinance Sales Officer Training Programme 2019**" is funded by the Government of Punjab and the Department for International Development (DFID), UK. The aim of the trainings is to improve the income generation capacity of unemployed young adults in skills through acquisition of knowledge, practical competencies, knowhow and attitudes necessary to increasing their access to jobs / income earning opportunities.

Under this scheme, Punjab Skills Development Fund (PSDF) intends to engage one organization for delivery of the training.

This document provides general information and basic eligibility requirements for participating in bidding process. Forms for submission of Bidding Document are provided in a separate file. Interested organizations who meet the eligibility requirements are invited to submit Bidding Document.

Bidding Document which includes Organization Profile and Technical & Financial Proposals for the proposed course must reach the following address by 31<sup>st</sup> May 2019. Incomplete or late received Bidding Documents will not be evaluated.

Secretary Training Service Selection Committee  
Microfinance Sales Officer Training Programme 2019  
Punjab Skill Development Fund  
21-A, Block H, Dr. Mateen Fatima Road, Gulberg II, Lahore.

### 3. INTRODUCTION

- 3.1 The purpose of this document is to enable interested Training Organizations/Institute and Universities to evaluate their interest in tendering and conducting training and is not a guarantee of the actual conditions under which the vocational training will be executed. Furthermore, it contains Forms and list of required documents to be submitted.
- 3.2 The Client named in the Data Sheet will select one entity (Training Provider), in accordance with the method of selection specified under para 17 and in the Data Sheet for providing training.
- 3.3 The organizations interested in provision of training should familiarize themselves with the specified terms and conditions and take these into account while preparing their Proposals. To obtain first-hand information regarding preparation of proposals, they are encouraged to attend a capacity building / pre-proposal conference.
- 3.4 PSDF reserves the right to verify any information provided by prospective bidders. False information / misstatement will lead to disqualification and rejection of the Bidding document; and the organization may also be blacklisted.
- 3.5 An organization may submit only one set of Bidding Document. The organization cannot be part of another Bidding Document directly or indirectly. In case of participation in more than one Bidding Document, the Proposals will be rejected. All documents and information received by PSDF from applicants will be treated in confidence.
- 3.6 The documents submitted to PSDF will not be returned and will be treated in strict confidentiality.
- 3.7 PSDF reserves the right to request submission of additional information from applicants in order to clarify any aspect of Bidding Document, if required.
- 3.8 The Client is not bound to accept any proposal and reserves the right to annul the selection process at any time prior to the award of Contract, without incurring any liability to the Training Provider.
- 3.9 PSDF reserves the right to cancel the call of Bidding Document without stating any reason.
- 3.10 **Conflict of Interest:** The Training Provider, its employee must
  - Not provide any assistance to any other person/entity in conflict with 'PSDF'
  - Not provide services for any assignment to same or another client.
  - Must disclose any conflicting relationships, and these relationships must not be affecting proposal submission and selection or at any other phase.
- 3.11 Training Provider must not be involved in any corrupt or fraud practices and adhere to highest ethical standards.
- 3.12 Performance calculation may be done based upon overall past performance, irrespective of any specific scheme.
- 3.13 PSDF may inspect Training Providers accounts and records and any other documents relating to the submission of proposals and have them audited by auditors appointed by PSDF or Government of the Punjab.
- 3.14 The successful Training Provider will sign a training contract and are required to complete the assignment within the mentioned Period. The services may be extended for further based upon the Performance or any other criteria announced by PSDF.
- 3.15 All direct & indirect taxes will be deducted in accordance with the provisions of Government Rules amended time to time.
- 3.16 In case of delay in services a penalty for delay may be imposed. If the firm completely fails to provide the services within prescribed period and doesn't comply with the reminders, the case of Training Provider may be put to relevant authorities to declare the Firm as "Blacklisted".

- 3.17 Payment of training services will be made on the satisfactory completion of trainings according to terms and conditions.
- 3.18 Punjab Skills Development Fund reserves the right to give multiple training assignments at a time and also reserve the right to increase or decrease the training assignments during or after contract period.
- 3.19 Qualified bidder will not be authorized to outsource the services of contract.
- 3.20 Training Providers should not contact the Client on any matter related to their proposals, any effort by the Training Provider to influence the Client or recommendation for award of Contract may result in rejection. In case of any dispute regarding services, the decision of PSDF shall be final & binding.

#### **4. PROPOSALS**

- 4.1 An organization may propose training for Microfinance Sales Training Program of four weeks duration in Lahore and Multan as specified in data sheet.
- 4.2 The graduating class shall be not more than 30 trainees.
- 4.3 Each proposed training location has to be under management / ownership of the Training Provider.

#### **5. PROPOSAL VALIDITY**

The Data Sheet indicates the time period for which the Proposals would remain valid after the submission date. During this period, Training Providers shall ensure the availability of professional staff nominated in the Proposal. If required, the Client may request the Training Providers to extend the validity period of their proposals. Training Providers who agree to such extension shall confirm that they maintain the availability of the professional staff nominated in the Proposal, in their confirmation of extension of validity of the Proposal. Training Providers may submit replacement staff, which would be considered in the final evaluation for award of Contract. Training Provider who do not agree have the right to refuse extension in the validity of their proposals.

#### **6. CLARIFICATIONS TO BIDDING DOCUMENTS**

Training Providers may request a clarification on any aspect of the Bidding Document up to the date indicated in the Data Sheet.

#### **7. PREPARATION OF BIDDING DOCUMENTS**

- 7.1. The Proposal as well as all related correspondence exchanged between the Training Provider and the Client shall be written in the language(s) specified in the Datasheet.
- 7.2. Bidding documents to be prepared and submitted to PSDF consist of:
  - I. Section 1: Organization's Profile
  - II. Section 2: Technical Proposal
  - III. Section 3: Financial Proposal
- 7.3. All the above mentioned three parts should have separate binding in book form.
- 7.4. Misrepresentation / omission of facts may lead to the disqualification of the Training Provider, as well as debarring from bidding in future PSDF-funded schemes.
- 7.5. While preparing the proposal, Training Providers must give particular attention to the following:

- 7.5.1. All documents (i.e. Forms, Annexures and other documents) relating to a part must have a single book-form binding. **Each page should be numbered and initialed by authorized representative of the organization.**
- 7.5.2. Proposals received in the form of loose papers or not complying with instructions will be declared non-responsive.
- 7.6. Responses to the respective sections / parts of the proposal and attached important documents must be clearly and properly flagged.

#### 8. ORGANIZATION'S PROFILE (Section 1)

Organization's Profile, Eligibility & Capacity part should be prepared using prescribed format. Additional required supporting documents must be attached. Section 1 containing all the required documents should be in book-binding form and place it with the technical proposal(s) envelope as directed below in point No. 9.

#### 9. TECHNICAL PROPOSAL (Section 2)

The envelope containing **the Technical Proposal shall be sealed and labelled as follows:**

*Technical Proposal*

*Name of the Trade: Microfinance Sales Officer Training*

*Name of Assignment: Microfinance Sales Officer Training Programme 2019*

*By: [Name of Organisation]*

#### 10. FINANCIAL PROPOSAL (Section 3)

- 10.1. Financial Proposal(s) shall be prepared using the Forms provided by the Client.
- 10.2. PSDF will consider costs in the manner specified in the Data Sheet.
- 10.3. The envelope containing the Financial Proposal shall be **sealed and labeled** as follows:

*Financial Proposal*

*Name of the Trade: Microfinance Sales Officer Training*

*Name of Assignment: Microfinance Sales Officer Training Programme 2019*

*By: [Name of Organisation]*

- 10.4. **Any Financial Proposal found in the envelope meant for Technical Proposal (or vice versa) will lead to rejection of the proposals.**

The Financial Proposal shall be marked by a warning "DO NOT OPEN WITH THE TECHNICAL PROPOSAL".

#### 11. SUBMISSION, RECEIPT, AND OPENING OF PROPOSALS

- 11.1. Bidding Document containing Section (1 & 2) and Section 3 in two separate envelopes shall be submitted in an outer-sealed envelope, clearly marked as follows:

*Bidding Document*

*Name of Assignment: "Microfinance Sales Officer Training Programme 2019"*

*By: [Name of Organization]*

*[Client address as provided in the Data Sheet]*



- 11.2. The Client shall not be responsible for any misplacement, loss or premature opening of documents if the outer envelope is not sealed and/or marked as stipulated. This may be a case for proposal rejection.
- 11.3. If the Financial Proposal is not submitted in a separate sealed envelope duly marked as indicated above, this will constitute grounds for declaring the Trade Proposal non-responsive.
- 11.4. The Proposals must be sent to the address indicated in the Data Sheet through courier and received by the Client not later than the time and date indicated in the Data Sheet or any extension to this date in accordance with these instructions. Any proposal submitted / delivered after the deadline for submission shall not be received.
- 11.5. Hard copies of all parts of bidding documents shall be sent to the address referred to in the Data Sheet through courier.

## 12. EVALUATION OF ELIGIBILITY AND CAPACITY OF THE ORGANIZATION

- 12.1. First of all, eligibility of the organization will be determined. Those organizations which do not fulfill basic eligibility conditions will be declared ineligible and their bids/proposals will not be evaluated further.
- 12.2. Capacity of the eligible organization will be evaluated which consists of human resources capacity and financial capacity. Organization scoring less than 65% will be declared non-responsive and their proposal(s) will not be evaluated.

## 13. EVALUATION OF TECHNICAL PROPOSALS

- 13.1. The Technical Proposal(s) of only responsive organizations shall be evaluated on the basis of their responsiveness to the information asked in this Bidding Document, applying the evaluation criteria specified in the Data Sheet and given a technical score (St). Scores will be awarded, and minimum 65% score is necessary for qualification. If a proposal fails to achieve the minimum qualifying technical score indicated in the Data Sheet, it will be rejected.
- 13.2. PSDF will charge an evaluation cost from Training Providers, as the evaluation of proposals is being outsourced. Training Providers are required to provide three Bank drafts in the name of "Punjab Skills Development Fund."
- 13.3. **Evaluation Cost:**  
First bank draft (**Section 1: Eligibility Check**) amounting to **Rs. 6,517 (six thousand five hundred and seventeen rupees only)** should be submitted for evaluation of eligibility.  
  
Second bank draft (**Section 1: Responsiveness Check**) amounting to **Rs. 7,195 (seven thousand one hundred and ninety-five rupees only)** should be submitted for evaluation of responsiveness.  
  
Third bank draft (**Section 2: Technical Proposal**) amounting to **Rs. 7,824 (seven thousand eight hundred and twenty-four rupees only)** should be submitted by every Training Provider.
- 13.4. In case the Organization is declared ineligible, the remaining two bank drafts will be returned to training provider. If the organisation is declared non-responsive, the third bank draft will be returned to the Training Provider. The bank drafts have to be placed

in envelope (1) with Organization's Profile and Technical Proposal (Section 1 & Section 2). Non-submission of bank drafts will result in rejection of the organization.

- 13.5. Performance of the organization will be evaluated based on Training Capacity, Quality of Training, Experience, Trainers etc.
- 13.6. PSDF staff or authorized third party representative will visit the training site before or during the technical evaluation phase to inspect facilities, location, capacity and other aspects of training. PSDF's assessment about the capacity shall be final.
- 13.7. After the technical evaluation is completed, the Client shall inform the qualifying Training Providers about the status of their technical score for trade at the time of opening of Financial Proposals.

#### 14. FINANCIAL PROPOSALS

- 14.1. In case of changes in the technical parameters, PSDF may ask the Training Providers to submit revised Financial Proposals. In such cases, all bidders will be given the opportunity to submit revised Financial Proposals.
- 14.2. Training Providers that secure the minimum qualifying technical scores shall be notified in writing; the date, time and location for opening of Financial Proposals. Training Providers' attendance at the opening of Financial Proposals is optional. The date of opening of Financial Proposals shall be set to allow interested Training Providers enough time to make arrangements for attending the opening ceremony.
- 14.3. Financial Proposals of the qualifying technical proposal only (scoring at least the minimum qualifying technical score mentioned in the Data Sheet) shall be opened.
- 14.4. Financial Proposals shall be opened in the optional presence of the Training Providers' representatives. The names of the Training Providers and their technical scores for a trade shall be announced. The Financial Proposals of the qualifying technical proposals will then be inspected to confirm that they have remained sealed and unopened. These Financial Proposals shall then be opened, and the bids will be announced and recorded.
- 14.5. In case of a discrepancy between words and figures, the formers will prevail. All activities and items described in the Technical Proposal but not priced, shall be assumed to be included in the prices of other activities or items.
- 14.6. The lowest quoted Financial Proposal (FM), on a cost per trainee per month basis, will be given the maximum financial score (Sf).

#### 15. SELECTION OF TRAINING PROVIDERS

Training Providers will be ranked based upon the combined technical and financial score. The organizations scoring the highest combined score in the trade Microfinance Sales Officer Training will be selected and its price per trainee per month (inclusive of taxes) will be set as a reference price. Contract will be awarded to the top rank organisation based on its total combined scores.

- 15.1. The quality and cost-based selection (QCBS) method will be used for engaging Training Provider.
- 15.2. The technical score will be awarded on the basis of:
  - i) Past Experience, and
  - ii) Training Capacity. Assessment of Training Capacity includes (but is not limited to): availability of required class room furniture; common facilities; qualification and experience of trainers & mentor; information on experience and mobilization; screening and training delivery.

- 15.3. The financial score of each technically qualified proposal will be calculated on the basis of per trainee per month cost including all applicable taxes. The organizations are ranked on the basis of their combined score i.e. weighted technical and financial scores.
- 15.4. The top-ranked organization will be awarded the contract.
- 15.5. The qualifying Proposals of eligible / shortlisted organizations will be the basis for agreement negotiations and ultimately for a signed Contract with the selected Training Provider.

#### **16. NEGOTIATION**

Negotiation may be done with Training Provider on two aspects (technical & financial) in order to reduce cost per trainee or for some changes in technical requirements. AWARD OF CONTRACT

- 16.1. After conclusion of negotiations, the Client shall award the Contract to the selected Training Provider.
- 16.2. The Training Provider is expected to commence the assignment after approval by the Client on the mutually agreed date and location.

#### **17. CONTRACT PERIOD**

Contract will be awarded for the period of eighteen (18) months which can be further for an additional period or additional trainees, on same cost and ToRs by mutual agreement of both parties, subject to release / availability of funds and performance evaluation by the Client.

## PART 2 DATA SHEET

<b>Name of the Scheme</b>	<b>Microfinance Sales Officer Training Programme 2019</b>																												
<b>Name of Client</b>	Punjab Skills Development Fund (PSDF)																												
<b>District of Training Location</b>	Lahore and Multan																												
<b>Target Number of Persons to be enrolled for Training Session</b>	<p>Maximum Class size: 30</p> <p>Total graduation target under the scheme is 1500 in 18 months. Enrolment would not exceed 30. PSDF may increase / decrease the set targets at the same cost.</p> <p>Timelines of estimated number of graduates:</p> <table border="1"> <thead> <tr> <th></th> <th>Aug-19</th> <th>Sep-19</th> <th>Oct-19</th> <th>Nov-19</th> <th>Dec-19</th> <th>Total</th> </tr> </thead> <tbody> <tr> <td>Lahore</td> <td>30</td> <td>30</td> <td>30</td> <td>30</td> <td>30</td> <td>150</td> </tr> <tr> <td>Multan</td> <td>30</td> <td>30</td> <td>60</td> <td>60</td> <td>60</td> <td>240</td> </tr> <tr> <td><b>Total</b></td> <td><b>60</b></td> <td><b>60</b></td> <td><b>90</b></td> <td><b>90</b></td> <td><b>90</b></td> <td><b>390</b></td> </tr> </tbody> </table>		Aug-19	Sep-19	Oct-19	Nov-19	Dec-19	Total	Lahore	30	30	30	30	30	150	Multan	30	30	60	60	60	240	<b>Total</b>	<b>60</b>	<b>60</b>	<b>90</b>	<b>90</b>	<b>90</b>	<b>390</b>
	Aug-19	Sep-19	Oct-19	Nov-19	Dec-19	Total																							
Lahore	30	30	30	30	30	150																							
Multan	30	30	60	60	60	240																							
<b>Total</b>	<b>60</b>	<b>60</b>	<b>90</b>	<b>90</b>	<b>90</b>	<b>390</b>																							
<b>Project Duration</b>	Contracts will be awarded for a total period of six (6) months with a possible extension of up to eighteen (18) months, based upon performance evaluation of Training.																												
<b>Trade &amp; its training session length</b>	<p>The Scheme is for the trade:</p> <p><b>Microfinance Sales Officer Training</b></p> <p>The duration of class will be of four weeks.</p>																												
<b>Training Providers</b>	<p>Training Provider must be one of the following:</p> <ul style="list-style-type: none"> <li>• Training Institute / Organization</li> <li>• University / College</li> </ul> <p>Training Provider should have experience in conducting Microfinance Loan Officer Training or Banking, Finance and related courses</p>																												
<b>Eligibility Condition</b>	<p><b>Training Provider must fulfil the following conditions;</b></p> <ul style="list-style-type: none"> <li>• Must have valid NTN / FTN in the name of the entity / Organisation.</li> <li>• Must have Documentary Evidence showing the legal status with relevant Government Authority. In case of sole proprietor, legal status will be verified from NTN.</li> <li>• In case of university / college / training institute, they must be registered / affiliated with any authorized national or international body</li> </ul>																												
<b>Responsiveness Criteria</b>	<p>Organisations will be evaluated on their Capacity on the submission of following documents</p> <ul style="list-style-type: none"> <li>• <b>Financial Capacity</b></li> </ul> <p><b>Option 1:</b> Provide Signed and stamp Bank Statement of last one year from 1<sup>st</sup> January 2018 to 31<sup>st</sup> December 2018.</p> <p>In case of new institute, bank statement will be provided from date of incorporation.</p> <p style="text-align: center;"><b>OR</b></p> <p><b>Option 2:</b> Provide financial statements issued by an ICAP licensed Chartered Accountant.</p> <p><b>Note:</b></p>																												

	<ul style="list-style-type: none"> <li>- PSDF has absolute right to ask for Financial Statements (in case of availing Option 1) or any other legal/financial documents in order to verify eligibility.</li> <li>- State owned organizations do not need to submit their financial records</li> </ul> <p>• <b>CVs of the Team:</b> Must provide CV of the Team specified in the document on the format prescribed by PSDF in Annexure A of Forms. <b>Note:</b> Copies of CNIC of the proposed team should also be attached with the form.</p>															
<p><b>Training Provider experience</b></p>	<p>Training Provider must have prior relevant training experience, but should not be running any microfinance programs simultaneously with PSDF funded program that may present intellectual property risks or risk of misappropriation of project curriculum materials which are copyrighted by PSDF or their Technical Partner</p>															
<p><b>Training Provision Team</b></p>	<p>A: Required personnel for management oversight:  <b>A.1 Project Lead</b> – senior management representative of the program (does not have to be dedicated full time to the project)  <b>A.2 Project manager</b> – main person responsible for implementation of project (can be same as project lead, does not have to be dedicated full time to the project)</p> <p>B: Required project personnel along with their roles &amp; requirements relevant to roles  <b>B.1: Required Personnel: -</b></p> <table border="1" data-bbox="568 1122 1385 1352"> <thead> <tr> <th>Direct Project Personnel</th> <th>Financial Sales Instructors</th> <th>Mentor</th> <th>Student Mobilization / Recruiting</th> <th>Center Administrator</th> </tr> </thead> <tbody> <tr> <td>Lahore</td> <td>3 (1 classroom)</td> <td>1</td> <td>1-3 on need basis</td> <td>1</td> </tr> <tr> <td>Multan</td> <td>6 (2 classrooms)</td> <td>1</td> <td>1-3 on need basis</td> <td>1</td> </tr> </tbody> </table> <p><b>B.2: Requirements for Each Role:</b></p> <ul style="list-style-type: none"> <li>• <b>Financial Sales Instructors</b> x 9 – In each classroom there will be three trainers for each trade who have previous experience with training, relevant job role, and preferably experience with delivering lesson plans (have to be dedicated to the project for the training duration)</li> <li>• <b>Mentor</b> (may be allocated part time to the session) – one mentor who can provide social support to participants in the form of coaching and mentoring sessions. Experience in sales job role is preferred. The mentor will also be responsible for post placement follow ups</li> <li>• <b>Recruitment manager</b> (does not have to be a separate individual, for example project manager or instructor could take on this responsibility) – mobilizing and raising awareness for program among target student population, scheduling interviews, conducting screenings, updating tracking software</li> <li>• <b>Center administration</b> (does not have to be full time or an individual) – individual(s) or department(s) responsible for center cleanliness, maintenance and upkeep</li> <li>• <b>2-3 person mobilization team</b> (do not need to be dedicated personnel, can include up to two instructors as well) who will be required to deliver:</li> </ul>	Direct Project Personnel	Financial Sales Instructors	Mentor	Student Mobilization / Recruiting	Center Administrator	Lahore	3 (1 classroom)	1	1-3 on need basis	1	Multan	6 (2 classrooms)	1	1-3 on need basis	1
Direct Project Personnel	Financial Sales Instructors	Mentor	Student Mobilization / Recruiting	Center Administrator												
Lahore	3 (1 classroom)	1	1-3 on need basis	1												
Multan	6 (2 classrooms)	1	1-3 on need basis	1												

	<ul style="list-style-type: none"> <li>○ Outreach / marketing / door to door mobilization / distributing pamphlets / running social media campaign to reach eligible candidates to raise awareness about the program and collect CVs or applications. In the past, 200-500 potential applicants had to be screened at centre to select a class of 30 students as per employer vacancies</li> <li>○ Conduct initial screening, interview scheduling/follow ups via Phone calls to the interested applicants to check basic eligibility and schedule interviews, and conduct follow ups with candidates who didn't show up for interviews etc.</li> <li>○ Schedule and oversee in-person interviews: Manage the online screening test administration, candidate attendance, candidate document checks, system updates etc.</li> <li>○ Schedule and oversee field visits for screening purposes: Visit multiple employer location and manage the logistics of the field day before the final selection</li> </ul>
<p><b>Training Implementation Methodology &amp; Timelines</b></p>	<p><b>PHASE 1 – Student Recruitment: 4 weeks</b></p> <p><b>STEP 1. Orientation:</b> Training service provider orientation on expectations, deliverables, timelines, suggested standard operating procedures, tracking software</p> <p><b>STEP 2. Staffing:</b> Instructor and mentor recruitment and selection with approval from PSDF / PSDF Technical Partner</p> <p><b>STEP 3. Staff Training:</b> This phase will involve personnel involved with delivering training, mentorship, and student screening / recruitment. Training could include online and in-person sessions.</p> <p><b>STEP 4. Student Mobilization, Interview Scheduling, Screening, Field assessment coordination (where required):</b> Managing and conducting all activities related to social mobilization or awareness raising or marketing for the program and related screenings. Screening process will include online registration and test, in-person interview, and field assessment</p> <p><b>PHASE 2 – Training Implementation: 4 weeks</b></p> <p><b>STEP 5. Implementation:</b> Execution of lesson plans provided by PSDF / PSDF Technical Partner at the given duration and frequency (typical program is 9-5 six days a week, but may vary depending on the job role being trained for)</p> <p><b>STEP 6. Quality Assurance:</b> Coaching visits / quality assurance checks will be provided by PSDF Technical Partner to support delivery of program according to best practices</p> <p><b>PHASE 3 – Placements: 4 weeks</b></p> <p><b>STEP 7. Placement scheduling:</b> Scheduling candidate interviews, ensuring candidate attendance and feedback / coaching sessions, monitoring &amp; reporting to PSDF / PSDF Technical Partner</p> <p><b>PHASE 4 – Follow-ups: Up to 1 year</b></p> <p><b>STEP 8. Job attainment tracking:</b> check-ins on day 30, 60, 90, 180, 360 after graduation to assess candidate performance and job attainment</p>

	<b>STEP 9. ongoing mentorship or social support sessions:</b> weekly or monthly mentorship support sessions with project alumni
<b>Trainee screening and selection</b>	<ul style="list-style-type: none"> <li>• Executing activities and any elements of a 'mobilization toolkit' (e.g. pamphlets, videos, presentations, letters to families etc.)</li> <li>• Mobilizing potential trainees from target divisions of Rawalpindi, Sargodha, Faisalabad, Bahawalpur, Gujranwala, Lahore, Sahiwal, Multan, Dera Ghazi Khan, Bahawalpur, Multan based on job locations provided by PSDF or PSDF Technical Partner</li> <li>• Conducting entry tests and orientation sessions as part of screening process.</li> <li>• Information gathering (registration form details) required for the purposes of the Program.</li> </ul>
<b>Implementation of Training</b>	Scheme will be implemented in the formal manner with both theoretical and practical component including field lessons in collaboration with employers. In that case a special monitoring mechanism will be agreed by both the parties.
<b>Target Group (Eligibility for Admission)</b>	Residents of Punjab meeting the following criteria: <ul style="list-style-type: none"> <li>• Age 18 -29 (Training Provider are responsible to comply with relevant labour laws while selecting the trainees).</li> <li>• Must not have education level of greater than intermediate (science /commerce preferred)</li> <li>• Motorcycle-driving license (for male candidates) preferred</li> <li>• Urdu and Punjabi speaking</li> <li>• Unemployed and looking for a job</li> <li>• Must have CNIC with permanent or temporary residential address of Punjab.</li> <li>• Must not have availed PSDF-funded training prior to enrolment.</li> <li>• Must not have been involved in crimes of moral turpitude</li> <li>• If any such trainee is found it will lead to the expulsion of the trainee</li> </ul>
<b>Minimum Hours of Conduct</b>	Minimum hours of conduct per week should not be less than 40.
<b>Payment to Training Provider</b>	<ul style="list-style-type: none"> <li>a) Training Fee</li> <li>b) Trainee Support Payments</li> </ul>
<b>Training Fee</b>	The financial bid will be based on training fee inclusive of all expenditures other than capital investment. For required cost heads, please refer to Financial Bid form.
<b>Trainee Support</b>	<p>Fixed Stipend:</p> <ul style="list-style-type: none"> <li>▪ @ Rs. 1,500 per trainee per month</li> <li>▪ Payment of stipend will be reimbursed to the TSP as per PSDF policy through the Training Providers and will be linked to attendance. PSDF may engage a third party for payment of stipend directly to trainees.</li> <li>▪ Uniform and a bag of acceptable quality for each trainee as per PSDF defined standard design &amp; colour. An amount of Rs. 1,500 per trainee (one-time cost) will be paid to the training provider for the purpose.</li> </ul>
<b>Validity of Proposal</b>	240 days from last date of submission.
<b>Proposal Language</b>	English
<b>Currency</b>	All financial figures should be quoted in Pak Rupees.
<b>Basis of Proposal Evaluation</b>	Quality and Cost-Based Selection (QCBS) methodology duly approved by PSDF's Board of Directors will be used for selection of Training Providers based on combined Technical and Financial Score

<b>Basis of Financial Evaluation</b>	The bids will be evaluated based on per trainee per month cost (inclusive of all taxes). All direct & indirect taxes should be mentioned in the financial proposal.																																	
<b>Any Special Condition</b>	PSDF may relax one or more conditions of the Bidding Document under intimation to all shortlisted Training Providers.																																	
<b>Bank Guarantee</b>	Mobilization Advance equal to 10% of the contract value (if requested) against irrevocable Bank Guarantee to be adjusted in instalments (maximum five).																																	
<b>Training Facilities</b>	<p>Following minimum standard shall be required for both trades: 2 Training Venues:</p> <ul style="list-style-type: none"> <li>- Location 1: Lahore</li> <li>- Location 2: Multan</li> </ul> <p>Training Venue Requirements</p> <p><b>Location 1: Lahore</b></p> <ul style="list-style-type: none"> <li>- 1 (one) Classroom dedicated to the program with capacity of at least 30 students with adequate light and ventilation</li> <li>- 1 (one) Staffroom (can be shared with other ongoing programs)</li> <li>- 1 (one) room for interviews / screening test</li> <li>- 1 room with up to 10 laptops or desktops (for recruitment and selection)</li> </ul> <p><b>Location 2: Multan</b></p> <ul style="list-style-type: none"> <li>- 2 (two) Classrooms dedicated to the program, each with the capacity of at least 30 students with adequate light and ventilation</li> <li>- 1 (one) Staffroom (can be shared with other ingoing programs)</li> <li>- 1 (one) room for interviews / screening test</li> <li>- 1 room with up to 10 laptops or desktops (for recruitment and selection)</li> </ul> <p><b>Accommodation for up to 20 candidates should be either provided on site, or arrangements with an accommodation partner(s) should be included in the bidding document</b></p> <p><b>Specific equipment &amp; requirement for training per venue</b></p> <table border="1" data-bbox="564 1541 1286 1883"> <thead> <tr> <th></th> <th>Item</th> <th>Quantity</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>Laptops/Desktops</td> <td>10</td> </tr> <tr> <td>2</td> <td>Tablets</td> <td>3</td> </tr> <tr> <td>3</td> <td>Student Seating</td> <td>35</td> </tr> <tr> <td>4</td> <td>Faculty seating &amp; tables</td> <td>As per venue requirement</td> </tr> <tr> <td>5</td> <td>Clean drinking water cooler</td> <td>1</td> </tr> <tr> <td>6</td> <td>High speed internet device</td> <td>1</td> </tr> <tr> <td>7</td> <td>Printer</td> <td>1</td> </tr> <tr> <td>8</td> <td>Projector/TV screen</td> <td>1</td> </tr> <tr> <td>9</td> <td>Electricity Back Up</td> <td>For all classes</td> </tr> <tr> <td>10</td> <td>Separate Male &amp;Female Washroom</td> <td>1 each</td> </tr> </tbody> </table> <p>These classrooms must be set aside for this program that takes place from 9am to 5pm every day (except Sundays) for a period of 8 weeks (i.e. 1 weeks for training of trainers, 4-week screening and registering students, 4 weeks student training)</p>		Item	Quantity	1	Laptops/Desktops	10	2	Tablets	3	3	Student Seating	35	4	Faculty seating & tables	As per venue requirement	5	Clean drinking water cooler	1	6	High speed internet device	1	7	Printer	1	8	Projector/TV screen	1	9	Electricity Back Up	For all classes	10	Separate Male &Female Washroom	1 each
	Item	Quantity																																
1	Laptops/Desktops	10																																
2	Tablets	3																																
3	Student Seating	35																																
4	Faculty seating & tables	As per venue requirement																																
5	Clean drinking water cooler	1																																
6	High speed internet device	1																																
7	Printer	1																																
8	Projector/TV screen	1																																
9	Electricity Back Up	For all classes																																
10	Separate Male &Female Washroom	1 each																																



	Training Providers must submit status of furniture, etc. that will be made available for training. All training facilities are subject to inspection.
<b>Contract Extension</b>	Performance of Training Provider would be evaluated. Subject to satisfactory performance evaluation and release/ availability of funds, the Contract may be extended for an additional period and/or for training of additional trainees, on same cost and ToRs by mutual agreement of both parties. Training Provider perceived to have demonstrated poor performance would not be considered for extension of contract.
<b>Means of Communication</b>	Formal communication between PSDF and Training Provider may be made through letter, email or fax.
<b>Client's Input</b>	Publicity of the Scheme and arrangements for stakeholders' visits and ceremonies (in case of a large-scale graduation ceremony etc.) at the completion of the assignment.
<b>Clarification Requests</b>	Requests addressed to Client's Representative/Contact Person in writing can be received before <b>May 27<sup>th</sup>, 2019; 05:00 PM.</b>
<b>Pre- Proposal Conference</b>	Pre-Proposal conference will be conducted in order to guide the organizations for preparing the Bidding Document effectively.  The interested organizations should get them registered <b>before May 22<sup>nd</sup> 2019</b> through an email at <a href="mailto:sherjeel.usmani@psdf.org.pk">sherjeel.usmani@psdf.org.pk</a> . Dates and venues of the conference will be shared through an email confirming the registration.
<b>Client's Representatives/ Contact Persons</b>	Sherjeel Usmani Punjab Skills Development Fund, 21-A, H-Block, Dr. Mateen Fatima Road, Gulberg II, Lahore. Phone No. +92-333-585-8329 Email: <a href="mailto:sherjeel.usmani@psdf.org.pk">sherjeel.usmani@psdf.org.pk</a>
<b>Submission Address</b>	<b>Bidding documents will be received through courier and should be addressed as under:</b>  Secretary Training Service Selection Committee Microfinance Sales Officer Training Programme 2019 Punjab Skill Development Fund, 21-A, H-Block, Dr. Mateen Fatima Road, Gulberg II, Lahore. Phone: 92-42-35752408-10
<b>Last Date of Submission of Bidding Documents</b>	Documents have to be physically received at the address prior to <b>May 31<sup>st</sup>, 2019; 05:00 PM</b>

## PART 3 TERMS OF REFERENCE

Punjab Skills Development Fund (PSDF) is funding training for residents of Punjab under the “Microfinance Sales Officer Training Programme 2019” scheme. The purpose of the vocational training is to provide trained workforce to employers and to promote income generation opportunities for the target population. The selected Training Provider will be expected to enter into a contract specifying the responsibilities and deliverables of the assignment.

Training provider contracted under this scheme will be responsible for mobilizing, assisting in selecting trainees and providing Instructors who will be upskilled through a Training of Trainer (TOT) by PSDF Technical partner to train the trainees. Trainees for the scheme will be from Punjab.

### **Responsibilities of Training Provider will be to:**

1. Mobilize the communities and select trainees for the proposed skills training according to the eligibility criteria defined by PSDF. Ensure target number of trainees mobilized and screened as per PSDFs Technical Partner’s requirements for a minimum class of up to 30 graduates that will be conducted within the agreement period.
2. Planning and executing activities elements of the mobilization via social mobilizers, newspaper ads, banner (e.g. pamphlets, videos, presentations, letters to families etc.)
3. Accept applications from only those **trainees** as per requirements of the areas provided by international training partner
4. Accept applications from only those trainees who have not already benefited from PSDF funding through verifying data of the trainees from PSDF website by entering CNIC number.
5. Arrange training facilities, furniture and other physical facilities (e.g. washrooms, backup power, drinking water, etc.) keeping in view the standards defined by PSDF.
6. Provide a list of competent and qualified instructors and support staff. PSDFs Technical Partner will identify and recruit 2 full-time instructors from the list provided, who will be 100% dedicated to the program. Ensuring training of trainers as per schedule and selected trainers will participate in a 2-week training of trainer’s workshop. If the suggested list of trainers does not satisfy the recruitment requirements, the Training Provider will need to arrange for new profiles as per PSDF’s requirement.
7. Get the facilities and arrangements inspected by PSDF before start of training.
8. Provide a list of mentors to be screened and selected for the program, one mentor per batch will be employed to support with student mentorship and various program activities. The role requirements will be set by PSDF.
9. Provide all learning aids, teaching materials, consumables, and additional facilities, as per demand of curricula, free of cost to the trainees (all costs on account of these items will be included in training fee which will be paid by PSDF).
10. Printing of training manual(s), if already not available.
11. Manage a transparent system of payment of stipend to trainees in a timely manner according to the notified rates (all records to be maintained). PSDF may engage a third-party organization for disbursement of stipend.
12. Establish a system for providing reports to PSDF within stipulated time through email or on a web-based data management system.
13. Facilitate and provide access to PSDF monitoring team for the monitoring of training.



Skills For Success

14. Maintain separate bank account and financial records relating to the PSDF assignment(s).
15. Assist any PSDF authorized partner in carrying out a tracer study / evaluation of the trained persons.
16. Arrange a simple graduation ceremony and distribute certificates to successful graduates on course completion and inform PSDF at least one week before the event.
17. Assist PSDF in the arrangements of graduation ceremony; if graduation ceremony is arranged by PSDF at large scale (cost of such ceremony arranged by PSDF will be borne by PSDF).
18. Display prominently sign-boards relating to the training at the training centre(s), as per design provided by PSDF.
19. Any other obligation agreed in the contract.
20. The Training Provider will be responsible for certain deliverables as per requirement of the project.
21. Maintaining records of trainee details, their performance and where they are placed utilizing any of PSDF Technical partner specific data management tools being developed

**Note:**

- a) In case of non-compliance with the responsibilities, financial penalties will be applicable.
- b) Training Provider will not charge anything to the trainees at any stage of the training process, in the form of provision of admission forms, enrolment, training delivery or certification.

**Responsibilities of Punjab Skills Development Fund are to:**

1. Provide funds to meet the expenses on training as per rate, number of trainees, attendance of trainees and payment schedule agreed in the contract.
2. Provide curriculum for the trades that are being trained by TSP.
3. The candidate interview process would be led by TSP, however PSDF or PSDF Technical partner would be closely assisting and providing support.
4. The Technical partner will identify and recruit 2 full-time instructors from the list provided by the Training Provider; the selected Instructors will be 100% dedicated to the program and will then participate in a 2-week training of trainer's workshop.
5. Testing and certification will be conducted by PSDF Technical partner.
6. Provide funds for meeting costs on account of Trainee Support which include stipend (if any), as determined by PSDF management.
7. Monitor / supervise the delivery of training through PSDF's Monitoring team and Technical partner.
8. Take measures for quality control through PSDF's Monitoring team and Technical partner.
9. Guide training partner for smooth implementation of training.
10. Arrange and finance a graduation ceremony (depending on the scale and as decided by PSDF), if any planned.
11. Bear costs on account of publicity as considered appropriate by PSDF management.
12. Inspect training facilities & arrangements and accord permission to start training (i.e. issue a Notice to Proceed).

**Joint Responsibilities of Punjab Skills Development Fund and Training Provider:**

1. To showcase the training Program funded by PSDF at different forums, if required.

## ANNEXURE C

### STANDARDS FOR ACCOMMODATION

Training Providers conducting training shall be responsible for the security and well-being of the boarders during the time that training is funded under the contract i.e. from the date of the trainee joining the class to the date of completion of training. *Specifically*, the training provider will be responsible for maintaining the following standards in a hostel:

**Location:** Accommodation cannot be located in buildings that are predominantly family dwellings nor can individual boarders be housed with families. The location should not be close to any hazardous site.

**Full-time Administration** shall be available at the the accommodation. Alternatively, complete 24/7 supervisory coverage shall be ensured.

**Space:** The hostel shall meet the following;

- Bedroom
- Dining area/common

**Furniture and Fixtures:** The hostel facilities shall have the following arrangements:

- 1 bed with mattress and pillow per trainee
- 2 bed sheets and 2 pillow covers
- Clean and functional toilet facilities
- Lighting, ventilation & fans

**Water:** The training premises and the accommodation facilities shall have clean drinking water facilities of acceptable standards.

**Cleanliness:** The hostel premises shall be cleaned on daily basis.

**Separate Areas:** Males and female accommodation shall be located at separately.

**Medical Cover:** A first aid box shall be maintained at the accommodation site.

**Orientation:** -

An orientation should be given to boarders covering: -

- **Fire/Accidents:** Measures to prevent or deal with fires or accidents. Firefighting equipment shall be available on the hostel premises.
- **Discipline:** Covering standards of acceptable behaviour, punctuality, use of facilities etc. Care shall be taken to ensure that no disturbance/inconvenience is caused in the neighbourhood due to undesirable behaviour of trainees. Administration shall fairly and effectively deal with any issues arising between boarders.

**Overstay:** PSDF shall not be responsible or liable for overstay (or any consequences thereof) of boarders beyond the contract period.

**Hostel Rules:** Training providers are encouraged to develop detailed rules (consistent with the above) and make these known to the trainees/boarders. These should also contain a system to address complaints.

**Monitoring:** PSDF or its monitors have the right to inspect hostel facilities at any time to ensure observance of the above rules.