

STANDARD REQUEST

FOR EXPRESSION OF INTEREST

Consulting Services (Firms Selection)

Royal Government of Bhutan Ministry of Finance

2019

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**PREFACE**

This Standard Request for Expression of Interest (SREoI) is based on the Procurement Rules and Regulations of the Royal Government of Bhutan. The SREoI must be used for the Procurement of Consulting Services (Firm). This document will come into effect from 1st July, 2019.

To obtain further information on procurement you may contact:

Regional Agricultural Marketing& Cooperatives Office, Mongar

Department of Agricultural marketing & Cooperative

Ministry of Agriculture and Livestock

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# REQUEST FOR EXPRESSION OF INTEREST

**REoI No. *[insert: REoI number]***

***Title of Consulting Services*** [Development of Financial Education & Business Literacy Training Module and Conduct of ToT]

# SECTION I: INSTRUCTIONS TO CONSULTANT

1. Scope of Assignment: The office has received a budget from Commercial Agricultural Resilient Livelihood Enhancement Programme (CARLEP) and intends to select a Consultant for the specific assignment as specified in the Terms of Reference in Section III.
2. Qualifications of the Consultant: Prospective Consultants shall demonstrate in their EoI that they meet the required qualifications and experiences and are fully capable of carrying out the assignment.
3. Conflict of Interest**:** The Consultant shall hold the Procuring Agency’s interests paramount, without any consideration for future work, and strictly avoid conflict with other assignments or its own corporate interests. For this purpose, the provisions of the Procurement Rules and Regulations on Conflict of Interest shall apply.
4. Unfair Advantage: If a Consultant could derive a unfair competitive advantage from having provided Consulting Services related to the assignment in question, the Procuring Agency shall make available to all Consultants together with this REoI all information that would in that respect give such Consultant any unfair competitive advantage over competing Consultants.
5. Preparation of EoI: EoI shall be typed or written in indelible ink in English language and shall be signed by the Consultant. Consultants are required to complete the following Forms including supporting documents to substantiate the qualification and experience of the firm:

### Section I - Instructions to Consultants Section II - Standard Forms

### Section III- Terms of Reference

1. Submission of EoI : The prospective Consultant may deliver their EoI by hand, mail, courier service to the address mentioned in the REoI.
2. The EoI shall be properly sealed in envelopes addressed to the Procuring Agency as mentioned in the REoI advertisement and bear the name & address of the Consultant as well as the name of the assignment.
3. The closing date for submission of EoI is 25th January 2024 *up to 5:*00PM. Any EoI received after the deadline for submission of EoI shall be declared late, and returned unopened to the Consultant.
4. The EoI may be modified or substituted before the deadline for submission. The Procuring Agency may at its sole discretion, extend the deadline for submission of EoI.
5. At any time prior to the deadline for submission of EoI the Procuring Agency for any reason or on its own initiative may revise the REoI Document by issuing an addendum, which shall form an integral part of the Document.
6. Evaluation: The Consultants shall be evaluated on the following criteria:

*[The Procuring Agency may modify and allocate the following indicative points based on their requirements and further breakdown each criteria into sub- criteria and allocate points accordingly].*

|  |  |  |
| --- | --- | --- |
| **Sl. No** | **Criteria** | **Points** |
| 1 | General experience of the firm | [5-10] |
| 2 | Relevant experience of the firm that best fit with proposed assignment | [10-30] |
| 3 | Relevant experience of Firm’s professional staff (including external professionals to be hired for the proposed assignment) in reference to the proposed assignment | [10-40] |
| 4 | Available Equipment | [0-10] |
| 5 | Any others | [0-10] |
| 7 | Total | 100 |

*[When the total points allocated is less than 100 the final points awarded should be scaled up/ converted out of 100 points*]

1. Immediately after the closing date and time for submission, the Procuring Agency shall open all EoI documents, including any substitutions accompanied by a properly authorized substitution notice.
2. Following the opening of the EoI, and until the RFP is issued; no Consultant shall make any unsolicited communication to the Procuring Agency. Such an attempt to influence the Procuring Agency in its decisions on the examination, evaluation, and comparison of the EoI may result in the rejection of the EoI.
3. EoIs shall be evaluated based on the criteria outlined under clause 11. Request for Proposal (RFP) documents shall be issued to the shortlisted consultants only.

# SECTION II: STANDARD FORMS

Form 1: Sample letter of Expression of Interest Form 2: Firm Information Sheet

Form 3: General Experience of the Firm during the Last 5 (five) calendar Years Form 4: Relevant Experience of the Firm during the Last 5 (five) calendar Years Form 5: Relevant Experience of the Firm’s Professional Staff

Form 6: Relevant Experience of the External Professional Staff available to the Firm

## Form 1: Sample Expression of Interest (EOI) for Consultancy services

Date:

To

Officiating Regional Marketing Coordinator

Regional Agricultural Marketing & Cooperatives Office

Mongar

Sub: **Expression of Interest (EOI) for the Consultancy Service …….***[Insert title of Consulting Services]*

Dear Sir/Madam,

This is in response to your public notice published in *[…………..insert name of paper/ website……………………]* on *[……insert date……………]*, inviting expression of interest for *[insert description of Consulting services].* We hereby submit our expression of interest and have attached necessary information according to the standard forms.

The information furnished by us in this expression of interest is correct to the best of our knowledge. Based on this information, we understand you would be able to evaluate our proposals in order to shortlist for the above-mentioned assignment. We, however, understand that the Procuring Agency reserves the right to decide whether or not to shortlist our firm without disclosing the reason whatsoever.

Sincerely yours,

On behalf of the firm: Signature: …………………. Name of signatory: Designation:

Company Seal

## Form 2: Firm Information Sheet

### Consulting Services Data

|  |  |
| --- | --- |
| Name of the consulting services |  |
| Brief Description of the Assignment |  |

### (a) Consulting Firm Information

|  |  |
| --- | --- |
| Name of the consulting firm: | Country of Registration: |
| Name of the owner: | Day, month & Year of Establishment: |
| Name of Authorized Representative (*if applicable*): | Position/Designation: |
| Contact Person details:  Name, Designation, email and phone number |  |

*[Attach valid Trade License /Registration certificate]*

### (b) Associations (Joint Venture or Sub-consultancy)

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Name of the consulting firm | Country of Registration | Joint Venture (JV) or Sub- consultant | Name of Owner/ Authorized representative | Position/Designation |
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*[Attach Certificate of Registration of the lead member, Certificate of Registration of the JV mem- ber (for each member) Certificate of Registration of the Sub-Consultant (for each sub-consultant), Letter of Association/letter of Intent to form JV/Association]*

* 1. **Core Area of expertise of the firm** *[Provide a brief Description]*
  2. **Company Profile** *[Provide a brief Description]*
  3. **Available Equipment** *[where applicable]*

Provide list of equipment owned by the firm and relevant for the assignment

## Form 3: General Experience of the Firm during the Last 5 (five) Calendar Years

9

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Sl. No** | **Name of the assignment** | **Name of the client** | **Address of the client** | **Duration of the assignment** | | | **Total Cost of the assignment Nu.** | **Remarks** |
| **From (Date)** | **To (Date)** | **Total (Months)** |
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## Form 4: Relevant Experience of the Firm during the Last 5 calendar Years

10

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| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Sl. No** | **Name of the assignment** | **Name of the client** | **Address of the client** | **Duration of the assignment** | | | **Total Cost of the assignment Nu.** | **Remarks** |
| **From (Date)** | **To (Date)** | **Total (Months)** |
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## Form 5: Relevant Experience of the Firm’s Professional Staff

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| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Sl. No** | **Name of the Staff** | **Qualification** | **Total Years of**  **experience** | **Relevant experience** | | | | | |
| **Name of assignment** | **Client** | **Position** | **Duration** | | |
| **From (Date)** | **To (Date)** | **Duration (Months)** |
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## Form 6: Relevant Experience of the External Professional Staff available to the Firm

12

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| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Sl. No** | **Name of the Staff** | **Qualification** | **Total Years of**  **experience** | **Relevant experience** | | | | | |
| **Name of assignment** | **Client** | **Position** | **Duration** | | |
| **From (Date)** | **To (Date)** | **Duration (Months)** |
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# SECTION III: TERMS OF REFERENCE

**TERMS OF REFERENCE FOR CONSULTANCY SERVICES FOR DEVELOPING TRAINING MANUAL ON FINANCIAL EDUCATION AND BUSINESS LITERACY (FEBL) TRAINING AND CONDUCT OF TOT FOR FACILITATORS**

**22 January 2024**

1. **Background**

Currently, the Ministry of Agriculture and Livestock (MoAL) is implementing the Commercial Agriculture & Resilient Livelihoods Enhancement Program (CARLEP) in six Dzongkhags of S/Jongkhar, P/gatshel, Trashigang and T/Yangtse, Mongar & Lhuentse. Approximately 28,000 households from 70 Gewogs 5000 HH are directly benefited by the project.

A key objective of the project is to facilitate the transformation of rural agricultural economies from subsistence to a market-driven productive sector through promoting climate smart approaches to agriculture and strengthening local institutions and communities.

Thus, in order to ensure effective knowledge on household finances, managing a farm as a business and managing a group enterprise by youth, Farmers Groups and Aggregators the Financial Literacy training is essential. Therefore, the project is seeking proposals from reputable and qualified firms that possess competent professionals to develop training manual on financial education and business literacy.

1. **Objectives**

The principal objective of the assignment are to:

1. Develop a Financial Education and Business Literacy (FEBL) training manual and resource materials covering financial literacy, household finance, managing a farm as a business and managing a group enterprise or producer organizations.
2. Conduct ToT training for FEBL facilitators selected from the producers groups or communities.
3. **Scope of Work**

The scope of work for the consultant includes, but not limited, to the following activities:

* Study relevant documents (Financial Education & Business Skills Training Manual, Financial Education and Business Skills Guidelines).
* Collection of relevant photographs/making relevant sketches and drawing.
* Finalize the course content of Financial Education & Business Literacy Training Manual’s pedagogical aspects with special focus on Adult Education.
* Develop FEBL training manual covering essentials of financial literacy including digital and household economy; Group management and governance; Farming as a household business including record keeping, basic numeracy and use of a calculator including digital literacy to finance and agriculture; commercialization and market-led production plan; managing a group enterprise, collective marketing, inputs/service arrangement, negotiation skills and incorporate a module on group saving schemes and its investment.
* Develop ToT Facilitators Manual both Dzongkha and English version that will guide Facilitator in delivering FEBL training at community level in effective manner.
* Include illustrative relevant pictures/drawings both colour and black & white in the manual using professional artist for better clarity and understanding of the content among the participants.
* Consultation with the relevant professionals in relative disciplines, and RAMCO/OPM team as and where required
* Proofread and editing of the manuals in meeting language/word consistency and simplicity to enhance quality, better clarity and understanding of the product.
* Presentation and Orientation of the prepared manual to Office of the Programme Management (OPM) and Regional Agriculture Marketing & Cooperatives (RAMCO) for feedback and suggestions
* Submit final draft (both hard copy and soft copy) of 2 sets Manuals (Resource Manual and ToT Facilitators Manual) along with original pictures or art.

1. **Qualification and experience of the firm**

The firm should have the following key personnel with qualifications as detailed below:

* Master’s in Business Administration or Financial Management with a minimum of 5 years’ experience in relevant discipline.
* Proven Experience in developing training and resource manuals with special focus on business and financial Skills.
* Visual artist with minimum of 5 years’ experience.

1. **Duration of the assignment**

The duration of the assignment shall be undertaken in a maximum of 3 months, including submission of the final FEBL manual and ToT facilitator’s manual.

1. **Selection of Consultant and Payment Terms**

The Consultant will be selected based on PRR 2023; Chapter 7: Procurement of Consultancy services using Quality and Cost Based Selection (QCBS) method.

The Consultant shall clearly indicate the fee for consultancy services when submitting the technical proposal and financial proposal.

**Payments to the consultant shall be done as follows:**

|  |  |  |  |
| --- | --- | --- | --- |
| Deliverables | Acceptance criteria | Due date | Payment |
| Receive Expression of Interests (EoI) for shortlisting |  | Within 7 days from announcement (EoI) |  |
| Received proposal as per the request for proposal | Review and approval by IFAD, CARLEP, RAMCO | Within 14 days |  |
| Evaluation and selection of the best evaluated Consultant | Review and approval by IFAD, CARLEP, RAMCO |  |  |
| Submission of the draft FEBL manual and ToT Facilitator’s manual | Review and approval by IFAD, CARLEP, RAMCO | Within 45 days RFP |  |
| Submission of final FEBL manual including sketches, drawing and pictures. | Review and approval by IFAD, CARLEP, RAMCO | Within 7 days |  |
| ToT to the FEBL Facilitators |  | Within 7 days after submission of final manual |  |