



Millennium Development Authority
Reducing Poverty through Economic Growth



TRAINING WORKSHOP FOR PROSPECTIVE BIDDERS

“Enhancing effective participation in MiDA contracts”

PROCUREMENT OF CONSULTANCY SERVICES

**Facilitator: Fuseini Abu
Procurement Director, MiDA**



Objectives of the Presentation

- ▶ To provide participants with a comprehensive understanding of the MiDA Bidding Process for Services
- ▶ Participants become better equipped to submit responsive and compliant Proposals and thereby increase their chances of winning.
- ▶ Discuss how to deal with some of the typical problems that arise when preparing and submitting a Proposal.

Selection Methods for Consultancy Services

- Quality and Cost Based Services (QCBS)
- Quality Based Services (QBS).
- Least Cost Selection
- Fixed Budget Selection
- Selection of Individual Consultant (SIC)
- Consultants Qualifications (CQS)



Request for Proposal (RFP)

LETTER OF INVITATION REQUESTING PROPOSALS (SPN)

PART 1: PROPOSAL AND SELECTION PROCEDURES

- Section I: Instructions to Consultants (ITC)
- Section II: Proposal Data Sheet (PDS)
- Section III: Qualification and Evaluation Criteria
- Section IV (a): Technical Proposal Forms
- Section IV (b): Financial Proposal Forms
- Section V: Terms of Reference

PART 2: CONDITIONS OF CONTRACT AND CONTRACT FORMS

Section 1 Instructions to Consultants (ITC)

- ▶ This section provides information to help potential Consultants prepare their Proposals; it also provides information on the submission, opening, and evaluation of Proposals and on the award of the proposed contract.
- ▶ **Sub-sections**
- ▶ A - General (Definitions, Scope, Source of Funds, Eligibility, Corrupt & Fraudulent Practices, etc)
- ▶ B - Contents of RFP
- ▶ C - Preparation of Proposals
- ▶ D - Submission and Opening
- ▶ E - Evaluation of Proposals
- ▶ F - Award of Contract
- ▶ **Note. This Section cannot be modified. It is the same for all RFPs.**

Instructions to Consultants

- ▶ **READ ALL INSTRUCTIONS – THERE IS NO SHORT CUT.**
- ▶ **SPECIFIC CLAUSES TO PAY PARTICULAR ATTENTION TO:**
- ▶ Clause 5 – Qualification and Eligibility of Consultants
- ▶ Clause 12 Preparation of Technical and Financial Proposals
- ▶ Clause 17 Sealing and Marking of Technical and Financial Proposals
- ▶ Clause 19 Late Proposals Shall Not Be Considered
- ▶ Clauses 21-24 Evaluation Processes
- ▶ Clause 25 Past Performance and Reference Checks

Proposal Data Sheet (PDS) 1

This section includes provisions that are specific to each procurement and supplements instructions in specific clauses in the ITC.

ITC 1.4 Informs you if a pre-Proposal meeting will be held and if so where.

ITC 8.1 Informs you of the deadline for submitting clarification questions (to paghana@charleskendall.com and procurement@mida.gov.gh) and the date by which responses will be issued to all Consultants.

ITC15.1 States that the currencies are United States Dollars or Ghanaian Cedi or a combination of both.

ITC 16.1 Confirms that Proposals must be valid for 90/120 days from the deadline for the submission of Proposals as specified in ITC 18.1

ITC 17.2 Requires a written Power of Attorney to be provided

ITC 17.3 Requires one (1) original and four (4) copies of both Technical and Financial Proposals to be provided, along with a CD or pen-drive copy of each with its respective envelope.

Proposal Data Sheet (PDS) Cont'd

This section includes provisions that are specific to each procurement and supplements instructions in specific clauses in the ITC.

ITC 17.5 Informs you of the address for submission – MiDA 4th Floor Tender Box.

ITC 17.6 Further confirms the marking of the outer envelope containing the envelopes for the Technical and Financial Proposals.

ITC 18.1 States the deadline time and date for submissions.

ITC 20.1 Confirms that Proposals will be opened in public immediately following the closure of the submission sheet on the Tender Box.

ITC 26.1 States that the expected date for negotiations is within 21 days after the opening of the Financial Proposals

ITC 30.1 States that the date for commencement of Services is 21 days after signing of the Contract and the location of the assignment activities; usually Accra but can be Tamale or various other locations in Ghana.

Sections I and II - What are the Issues

- ▶ Attend the pre-Proposal Meeting to be better informed.
- ▶ Submit clarification questions before the stated deadline.
- ▶ Read all of the clarification question responses and ensure your Proposal incorporates the details provided.
- ▶ Ensure your Proposal is valid for the stated period.
- ▶ Power of Attorney can be to sign the Proposal, or to sign the Proposal and thereafter negotiate and sign the Contract.
- ▶ Ensure the correct number of Proposals are submitted with a pen-drive/CD.
- ▶ Ensure your Proposals are signed.
- ▶ Ensure your Proposals are correctly packaged and marked as instructed.
- ▶ Submit your Proposal in good time. Do not wait until the last minute and have your Proposal rejected because you are late.



Section III

Qualification and Evaluation Criteria

Qualification Criteria (Pass/Fail)

LEGAL STATUS – Letter(s) of Incorporation, Joint Venture or Association Agreements, Power of Attorney (Tech-1)

FINANCIAL CRITERIA - Three (3) years Audited/Certified Financial Statements of Consultant and any Joint Venture partners (Tech-2A)

LITIGATION CRITERIA – Detail Current and Past proceedings, Litigation, Arbitrations, Actions, claims, Investigations and Disputes over the last five (5) years (Tech-2B)

Section III

Qualification and Evaluation Criteria

Evaluation Criteria (Points are awarded here)

ORGANIZATIONAL CAPABILITY AND EXPERIENCE OF THE CONSULTANT – Evidence of relevant experience in the execution of Projects of a similar nature, the value and nature of the relevant Contracts, as well as works in hand and contractually committed. Must show successful experience as the prime consultant in the execution of at least two (2) projects of a similar nature and complexity during the last five (5) years.

APPROACH, METHODOLOGY AND WORK PLAN - Requires the Consultant to demonstrate a clear understanding of the assignment. The organization and staffing plan must provide a clear, logical and appropriate staffing pattern with responsibilities among different staffing positions clearly defined.

KEY PROFESSIONAL PERSONNEL – Educational Qualifications, relevant number of years' Work Experience, and Experience in the Region (e.g. West Africa, and/or sub-Saharan Africa, and/or Developing Countries)

Section III

Qualification and Evaluation Criteria cont'd

- Under QCBS, the usual weights for Technical & Financial Proposals are as follows:
- The weight given to the Technical Proposal, T = 80%
- The weight given to the Financial Proposal, F = 20%
- A Consultant is required to obtain the minimum Technical Score to be able to proceed to the next stage of the evaluation.
- The Financial Scores are determined by a formula [$S_f = 100 \times F_m / F$, in which S_f is the financial score, F_m is the lowest price, and F the price of the Proposal under consideration]

Technical and Financial Scores

Firm	Final / Corrected Cost	Financial Score	Weighted Financial Score
A	200,000	75	15
B	150,000	100	20

Firm	Technical Score	Weighted Technical Score (0.8)	Financial Score	Weighted Financial Score (0.2)	Combined Score
A	92	73.60	75	15	88.60
B	87	69.60	100	20	89.60

Section IV: Technical Proposal Forms

- **TECH-1** Technical Proposal Submission Form
- **TECH-2A** Financial Capacity of the Consultant
- **TECH-2B** Current and Past Proceedings, Litigation, Arbitration, Actions, Claims, Investigations and Disputes of the Consultant
- **TECH-3** Organization of the Consultant
- **TECH-4** Experience of the Consultant
- **TECH-5A** References of the Consultant
- **TECH-5B** References of MCC-Funded Contracts
- **TECH-6** Description of Approach, Methodology and Work Plan for Performing the Assignment
- **TECH-7** Comments and Suggestions on the Terms of Reference & Assignment
- **TECH-8** Team Composition and Task Assignments
- **TECH-9** Staffing Schedule
- **TECH-10** Work and Deliverables Schedule
- **TECH-11** Curriculum Vitae (CV) of Proposed Key Professional Personnel



Section IV: Financial Proposal Submission Forms

- FIN-1 Financial Proposal Submission Form
- FIN-2 Price Summary
- FIN-3 Breakdown of Price by Activity
- FIN-4 Breakdown of Price by Remuneration
- Note: **Fully-Loaded Monthly Rates**

Sections III and IV - What are the Issues (1)

- **Legal Status** – Remember to provide the Power of Attorney, Joint Venture/Association Agreement and required documents with the submission letter in form **TECH-1**.
- **Financial Criteria** – Provide 3 years' accounts and ensure you comply with form **TECH-2A**. No information on prices should be included in the Technical Proposal.
- **Litigation Criteria** – Failure to provide details in form **TECH2-B** could result in disqualification.
- **Organizational Capability** – Important to show your Organization's details in form **TECH-3** and your Organization's experience in form **TECH-4**.
- **References** – Ensure you provide all details required in form **TECH 5A** (Consultant References) and **TECH-5B** (MCC Funded Contract References)
 - **Contract Name and Number**
 - **Role of the Organization in the Contract**
 - **Total Amount of the Contract**
 - **Employer's name, Address, Contact Individual, Title, phone and email address(es)**

Sections III and IV - What are the Issues (2)

- ▶ **Approach and Methodology** – Ensure in response to form TECH-6 you not only show a clear understanding of the TOR but **also** how you plan to undertake the assignment.
- ▶ **Work Plan, Organization and Staffing of the team** – Also in response to form TECH-6, ensure you align your plans to the Approach and Methodology, the requirements of the TOR and explain your rationale.
- ▶ **Comments and Suggestions on the TOR (TECH-7)** – Present and justify any modifications or improvements to the TOR that you consider would either improve performance or you deem unnecessary. You can also comment on the staff and facilities to be provided by MiDA.
- ▶ **Team Composition and Tasks Assigned (TECH-8), Staffing Schedule (TECH-9), and Work and Deliverables Schedule (TECH-10)** – Ensure the forms are completed and that they align to all statements made in your response to form TECH-6.

Sections III and IV - What are the Issues (3)

- ▶ **Curriculum Vitae for Key Personnel (TECH-11)**
 - **Ensure that you present all CV's in the format provided.**
 - **Ensure the CV includes the three (3) Referees and their full contact details.**
 - **Ensure that the CV is signed either by the individual being proposed or the Consultant Organization on behalf of the individual in accordance with the instructions provided.**
 - **The TOR is likely to require educational and qualification requirements for each of the Key Personnel listed such follows:**

Sections III and IV - What are the Issues (4)

- Educational qualifications (either Masters, or Bachelors, or Diploma) in a stated field of expertise relevant to the assignment and position.
- Membership of a Professional Organization.
- “X” years’ specific work experience in one or more areas. Ensure the number of years experience requested is clear in the CV so that it can be evaluated.
- Proficiency in written and spoken English or even local languages.
- IT capabilities (Word, Excel, Microsoft Project, Power point etc).
- Experience in West Africa and/or sub-Saharan Africa and/or Developing Countries.

DO NOT SIMPLY SUBMIT THE CV YOU RECEIVE FROM AN INDIVIDUAL.

ALWAYS ENSURE THE CV IS UPDATED SO THAT ALL RELEVANT EXPERIENCE OF THE INDIVIDUAL IS INCLUDED SO AS TO MAXIMIZE YOUR CHANCES OF SUCCESS.

Section V: Terms of Reference

Interested Consultants should read the Terms of Reference very carefully as it provides, among others:

- The Background to the Compact and Assignment
- The Institutional Arrangements and Stakeholders
- Scope of Work.
- Reporting Requirements.
- Deliverables and Submission Time Lines.
- Payment Schedule.
- Expected Level of Effort.
- Key and any Non-Key Personnel.
- Services and Facilities to be provided by MiDA and the Consultant

Section V- What are the Issues

- ▶ **Scope of Services** - Make sure you cover the whole Scope of Services in your Approach, Methodology and Work plan.
- ▶ **How** - Ensure your Proposal makes it clear that you not only understand the TOR, but also **how** you propose to carry out the assignment. If you simply cut and paste parts of the TOR your Proposal will be marked down.
- ▶ **Deliverables and Submission Times** – Ensure you understand and can comply with the requirements and address this in your Proposal. All deliverables are subject to **acceptance** by MiDA before payment can be effected.
- ▶ **Payment Schedule** – Ensure that you understand the terms being offered. Also note payments are made by the MiDA Fiscal Agent within 30 days of receipt of both your invoice and the Receiving Note (**acceptance**).
- ▶ **Expected Level of Effort** – This provides guidance as to the expected length of the contract and the inputs required.
- ▶ **Key and Non-Key Personnel** – Ensure you have the Key Personnel with the required qualifications and experience. If you do not have them in house or cannot recruit them it is probably not worth your submitting a Proposal.
- ▶ **Services and Facilities** – Ensure you are clear on what you and MiDA are each to provide.

RFP PART 2; Conditions of Contract and Contract Forms

- Contract Agreement and General Conditions of Contract (GCC)
- Special Conditions of Contract (SCC) and Annexes
- **Annex A: Description of Services**
- **Annex B: Additional Provisions**
- **Annex C: Reporting Requirements**
- **Annex D: Key Professional Personnel and Sub-Consultants**
- **Annex E: Breakdown of Price in US dollars**
- **Annex F: Breakdown of Price in Ghanaian Cedi**
- **Annex G: Services and Facilities to be Provided by MiDA**

Section VI - What are the Issues

- **Contract Agreement and General Conditions of Contract (GCC)** – These cannot be changed but they must be read and understood.
- **Special Conditions of Contract** – These are amendments of, or supplements to, clauses in the GCC. When preparing your Proposal it is important to take note of these provisions, particularly:
 - GCC 10.5 - Whether a Resident Project Manager is required or not.
 - GCC 13.2 - Settlement of Disputes.
 - GCC 17.3 - Invoice Delivery
 - GCC 36.1 - The insurance requirements on vehicles, third party liability, professional liability insurance, employers liability and workers' compensation and cover against loss or damage of equipment or property.
- **Description of Services** – This will be an updated version of the TOR as agreed between the parties after negotiations so it is imperative you understand the TOR becomes the Description of Services in the Contract.
- **Annex B** – The Additional Provisions are an MCC requirement and cannot be changed or deleted.

Closing Advice

- ▶ WHAT DO YOU DO IF YOU ARE NOT SURE ABOUT ANY PART OF:
 - The Instructions to Consultants
 - The Content of the Proposal Data Sheet
 - The Evaluation Criteria
 - The Terms of Reference
 - The draft Form of Contract and the Conditions therein

YOU SEND A CLEARLY WORDED QUESTION, OR SET OF NUMBERED QUESTIONS, WITHIN THE STATED DEADLINE IN THE PDS FOR CLARIFICATION QUESTIONS TO BE ASKED TO paghana@charleskendall.com with a copy to procurement@mida.gov.gh.

REMEMBER – IF YOU DO NOT SUBMIT YOUR QUESTIONS WITHIN THE CLARIFICATION QUESTION DEADLINE, AND THE GUESS YOU SUBMIT IN YOUR PROPOSAL IS WRONG, THEN IT IS TOO LATE TO COMPLAIN AFTER THE EVENT – IF IN ANY DOUBT ALWAYS ASK A QUESTION.



Thank You