**Ministry of Finance, Royal Government of Bhutan**

Bhutan Multi Donor Fund for Public Financial Management Reform Program

Project ID: P162196, P174501

**Request for Expression of Interest**

(Consulting Services - Firm Selections)

Assignment: **Development of Mobile Daily Allowance & Travel App and**

**Integration with e-PEMS**

1. **Background Information**

To formulate and implement dynamic fiscal policy as well as strengthen public financial management (PFM) for effective resource mobilization, efficient allocation, prudent expenditure and debt management with proper accountability of public resources, the Department of Treasury and Accounts (DTA) has developed and implemented electronic Daily Allowance & Travel System (eDATS) since July, 2021 with more than 46000+ users, spread across the Country. eDATS has been developed on the Laravel framework of the PHP platform and DB for reporting purposes.

The system has helped replace manual TA/DA forms to reduce paper usage in the government, improve timeliness and convenience in processing individual claims, to bring uniformity in the application of the TA/DA rules in Budgetary Bodies, improve government reporting, prevent double claims/payments, pave way to cashless modality and minimize the risk of corruption. However the web based system is not capable of implementing some of the advanced features such as capturing images with geo-coordinate of location which would help maintain the integrity of the users such as curtailing under table tours.

To further enhance and to accommodate the feedback received from the users and to stabilize the system to bring fiscal transparency, effectiveness and efficiency in the disbursement of public servants’ traveling allowances, the department has come to the conclusion of implementing the existing web based system into mobile application with more advanced features. In this regard, the department intends to develop Mobile apps which can serve the users with the features already implemented in web based systems with ease and comfort as well as some of the advanced features to make the system more relevant and applicable.

The e-PEMS which is electronic Public Expenditure Management System, an accounting and payment system of the Royal Government of Bhutan which was launched in July 2019. The integration between eDATS and ePEMS has not happened despite both the system being under ownership of the DTA, MoF. The mobile app development and the integration with the e-PEMS will further strengthen the Public Financial Management under the under the PFM reform initiatives.

This activity is being carried out with the financial support of multi-donor fund (MDF) contributed by the European Union (EU) and Austrian Development Agency (ADA), and administered by the World Bank (WB).

# 2. Objective

The main objective for developing the Mobile Daily Allowance and Travel app are to:

1. Replicate the entire TA/DA functionalities and processes of the Web based application system to make it mobile friendly.
2. Add functionality to capture image/picture with geo-coordinate locations
3. To ensure interoperability and flexibility TA/DA over multiple platforms such as via mobile as well as web based.
4. Prevent double claims/payments and minimize under-table tours
5. Enhance user experience with the utilization of in-built features of mobile phones like GPS, camera, etc.

And the objective of the integration of eDATS with e-PEMS is

1. Removal of manual update of the employee data in the eDATS and importing of the employee data from Government Payroll System (a system under the e-PEMS) without human intervention.
2. Linking of the Travel authorization form and the travel claims to the payment vouchers thus removing the need of hard copy travel documents and reducing administrative burden.
3. The Consultant will be selected in accordance with Selection Based on Consultant's Qualifications Selection (CQS) procedure set out in the World Bank Procurement Guidelines (current edition). The Bidders have to submit *a full Expression of Interest (EoI) including their initial technical proposal* meeting the Eligibility Criteria as well as Selection criteria as per the Terms of Reference (ToR). Only the proposals which fulfil the eligibility criteria shall be evaluated using the selection criteria as per ToR. The most qualified firm on the basis of the evaluation shall be asked to submit a *combined technical and financial proposal* and if such proposal is responsive and acceptable, then the firm will be invited to negotiate the contract. Kindly note that no financial proposal shall be submitted at this stage. A firm submitting the financial proposal at this stage shall be disqualified and their proposal shall be rejected without evaluation.
4. The Consultancy duration shall be for 77 days from the date of signing of the consultancy agreement.

Interested national Consultant may submit Expression of Interest (EOI) in a sealed envelope clearly superscripted as Request for Expression of Interest for “***Hiring of National Consultancy firm for the Development of Mobile Daily Allowance and Travel App and Integration with ePEMS***” and submission of REOI via electronic/email will not be accepted and may obtain further information about the services, procedures for submitting the REOI etc. from the contact address given below.

***Mr. Kinzang Norbu***

***Deputy Chief Finance Officer***

***Department of Treasury and Accounts***

***Ministry of Finance***

***Thimphu, Bhutan***

***Contact: +975 1760 8182(m)***

***Email address:*** *kinzangn@mof.gov.bt*

The REOI must be submitted to the address below on or before **11:30 Hours (BST) on** **10th April, 2023**. Late submissions shall be rejected. For further information please visit MoF website ([**www.mof.gov.bt**](http://www.mof.gov.bt/)).

Procurement Unit

Division of Support Services

Ministry of Finance

Tashichhoe Dzong, Thimphu

**TERMS OF REFERENCE (TOR)**

**[Development of Mobile Daily Allowance & Travel App**

**and**

**Integration with e-PEMS]**

**Ministry of Finance**



1. **Background Information**

To formulate and implement dynamic fiscal policy as well as strengthen public financial management (PFM) for effective resource mobilization, efficient allocation, prudent expenditure and debt management with proper accountability of public resources, the Department of Treasury and Accounts (DTA) has developed and implemented electronic Daily Allowance & Travel System (eDATS) since July, 2021 with more than 46000+ users, spread across the Country. eDATS has been developed on the Laravel framework of the PHP platform and DB for reporting purposes.

The system has helped replace manual TA/DA forms to reduce paper usage in the government, improve timeliness and convenience in processing individual claims, to bring uniformity in the application of the TA/DA rules in Budgetary Bodies, improve government reporting, prevent double claims/payments, pave way to cashless modality and minimize the risk of corruption. However the web based system is not capable of implementing some of the advanced features such as capturing images with geo-coordinate of location which would help maintain the integrity of the users such as curtailing under table tours.

To further enhance and to accommodate the feedback received from the users and to stabilize the system to bring fiscal transparency, effectiveness and efficiency in the disbursement of public servants’ traveling allowances, the department has come to the conclusion of implementing the existing web based system into mobile application with more advanced features. In this regard, the department intends to develop Mobile apps which can serve the users with the features already implemented in web based systems with ease and comfort as well as some of the advanced features to make the system more relevant and applicable.

The e-PEMS which is electronic Public Expenditure Management System, an accounting and payment system of the Royal Government of Bhutan which was launched in July 2019. The integration between eDATS and ePEMS has not happened despite both the system being under ownership of the DTA, MoF. The mobile app development and the integration with the e-PEMS will further strengthen the Public Financial Management under the under the PFM reform initiatives.

This activity is being carried out with the financial support of multi-donor fund (MDF) contributed by the European Union (EU) and Austrian Development Agency (ADA), and administered by the World Bank (WB).

# 2. Objective

The main objective for developing the Mobile Daily Allowance and Travel app are to:

1. Replicate the entire TA/DA functionalities and processes of the Web based application system to make it mobile friendly.
2. Add functionality to capture image/picture with geo-coordinate locations
3. To ensure interoperability and flexibility TA/DA over multiple platforms such as via mobile as well as web based.
4. Prevent double claims/payments and minimize under-table tours
5. Enhance user experience with the utilization of in-built features of mobile phones like GPS, camera, etc.

And the objective of the integration of eDATS with e-PEMS is

1. Removal of manual update of the employee data in the eDATS and importing of the employee data from Government Payroll System (a system under the e-PEMS) without human intervention.
2. Linking of the Travel authorization form and the travel claims to the payment vouchers thus removing the need of hard copy travel documents and reducing administrative burden.

# 3. Scope of Work

The scope of the work is mentioned below but is not limited to the following:

 (i) Develop a Mobile APP with all functionalities and functions of the current web-based Daily Allowance and Travel Allowance system with ease and comfort. The APP should have a main functionality to capture an image/ picture of location with geo-coordinates.

(ii) The vendor shall study all the necessary features and plot geo-coordinates on the base map to ensure validation and verification of locations.

(iii) Some of the functions and necessary features and requirements of the app are specified and should not be limited to those mentioned in the Technical Requirements. The vendors should understand the functionality and working of the proposed app in detail during the design phase.

(iv) The vendor shall follow Agile development methodology. Every MVP (Minimum Viable Product) should be demonstrated and sought validation from the client before proceeding to the next MVP development.

(v) Ensure that the procuring agency is fully verse in the operation of the application, backup and configuration. Also provide the operation manual to the procuring agency.

(vi) Provide complete source code with all the system files needed for installation and execution of the package including installation manual.

(vii) The SDV must provide support and assistance to the procuring Agency to gain necessary expertise and confidence in using the application developed by SDV.

(viii) Provide product support from the time of acceptance of the application by the Procuring Agency and carry out revisions, if any, arising out of bugs or minor changes.

(ix) Implement and provide the application with all the standard security features inbuilt to ensure integrity of data. The SDV will be responsible for the recovery of the data that is tampered with because of lack of standard security features.

(x) The application package must have user access roles through which it can assign or revoke rights of a user to a function or data.

(xi) Handle overall technical issues including hardware, software, storage, licensing and other technical requirements. Regularly check and implement system updates, security patches and hardware/software firmwares including updates in the android and iOS platform.

(xii) Develop a separate application to receive the data flow from eDATS and accordingly update during the voucher preparation in e-PEMS.

(xiii) Integrate the eDATS and e-PEMS through the means of API or any other means of communication acceptable to client.

(xiv) Develop the required reports related to eDATS in eDATS and e-PEMS.

# 4. Deliverables

The Firm shall submit the following deliverables after contract signature/start of work:

D1: An Inception Report including a detailed work plan covering all activities in scope of this assignment (within 1 week).

D2: Integration of eDATS to the e-PEMS as per the System Requirement Specifications (SRS) including enhancement in eDATS (within 5 weeks).

D3: Development of fully functional Mobile Daily Allowance & Travel app and all those mentioned in the Scope of Work including (within 9 weeks)

1. Hosting and managing necessary technical requirements for operation of the app.
2. Complete licensing requirements for the operation of the mobile apps.
3. Documentation and training for operation, maintenance and troubleshooting

D4: Final report with detailed functional and technical description of the integration of the e-PEMS & eDATS and eDATS Mobile App including the source code of the integration, eDATS enhancement and Mobile App. The final report also to include recommendations for the sustainability of the systems and strengthening the software  development skills of the MoF ICT Unit (within 11 weeks)

# 5. Technical Requirements/Description of the Mobile Daily Allowance and Travel App

## A. Mobile Daily Allowance and Travel App Functions

The Daily Allowance & Travelapp shall consist of two important components;

1. **General Users**

*1.1* *Travel Authorization*

In this function, the mobile app should be able to let the users apply for travel authorization in which a user can give the information on the purpose of the travel, start date and end date along with the approving authority and travel type.

*1.2* *Travel Extension*

In this function, the mobile app should allow users to apply for extension of the travel if they need extra time for the completion of work or any other emergency reasons like roadblock.

*1.3* *Travel validation (Geo-Location)*

In this function, the mobile app should allow users to update the current status of their travel along with the function to capture the image with geo coordinates which will locate the place in the map helping approving authority to validate the integrity of their employee.

*1.4 Travel Report*

In this function, the mobile app should allow users to submit their travel report along with the video and image evidence.

*1.3 Travel Allowance Claim*

In this function, the mobile app should auto generate a Travel Allowance Claim once the Travel Authorization is approved by the Approving Authority.

1. **Approving Authority**

*2.1 Travel Authorization (Approval)*

In this function, the mobile app should be able to let the users view the details of the application for travel and approve/reject it.

*2.2 Travel Extension (Approval)*

In this function, the mobile app should allow users to view the details of the extension for travel and approve/reject it.

*2.3 Travel validation (validation)*

In this function, the mobile app should allow users to view the report and constantly monitor the current status of their employee with the image they have uploaded which has geo coordinates which will locate the place in the map helping the approving authority to validate.

*2.4 Travel Report (validation)*

In this function, the mobile app should allow users to view the report of the travel and validate it.

*2.5 Travel Allowance Claim (Approval)*

In this function, the mobile app should allow the users to view the details of the claim of the travel and approve/reject it.

## B. Integration of eDATS with e-PEMS

The integration of eDATS with the e-PEMS shall be as per the SRS (System Requirement Specifications) which includes changes in eDATS at user management, reports and in e-PEMS in creation of a new application to support the data received from eDATS in preparation of the payment voucher.

## C. System Development Requirements

The Mobile app should be functional both in the iOS and Android platforms. The system requirements for the integration is mentioned in the SRS.

The Mobile app installed in the user device should be able to measure above technical parameters**.** The Mobile app along with the above measured results, should also send the following details to the data collecting server automatically:

1. Geo-coordinates of the location of the mobile phone from where the image is taken.
2. Time and Date of Image taken
3. Mapping: It should also be mapped with the google-map based on the geo-coordinates reading automatically.
4. Reporting: The data received (*data collected from the user's mobile phone*) needs to be generated as an individual report.

**D. System Development Methodology**

SDV should adopt the agile development methodology. The entire work should be broken down into smaller chunks of MVPs(Minimum Viable Products), and every MVP should be demonstrated to the client before proceeding to the next MVP development.

**E. Software User Requirements**

This development activity includes:

(i) Mobile app development with all existing web based features/functionalities replicated.

(ii) Integrate with the database system of the web based system.

(iii) Operational activity such as hosting, managing necessary technical requirements for the operation of Mobile App.

(iv) Licensing requirements including technical softwares for development, license for operation and other licensing requirements to fully operate Mobile Daily Allowance and Transfer app.

(v) Enhancement in the eDATS along with the required API

(vi) Enhance in the e-PEMS along with the required API and the development of the new application to support of eDATS data while preparing the voucher

(vii) Enhancement to the existing reports in eDATS and e-PEMS.

## G. Platform and Technology

(i) The infrastructure for hosting the applications gateways, databases and platforms shall be provided by the Procuring Agency in the Government data center.

(ii) The proposed application must run on popular mobile OS (iOS and Android).

(iii) The recommended language for the application development is java with any cross platform framework.

## H. Concurrency, Browser Compatibility and Bandwidth Optimization

The application including the database/s must provide at least 9,000 concurrent accesses with load balancing/caching facilities for high performance.

The portal developed should run optimally on Android and iOS devices. The application must run on any screen size (tablets, phones). Using modern UI frameworks for responsive design is highly recommended.

# 6. Development Process Flow

The following are some of the activities required to successfully complete the assignment:

(i) The Vendor shall carry out a detailed assessment of the existing web-based TA/DA application and the e-PEMS specifically focused on the travel transaction details and other related travel parts. The vendor shall replicate all functionalities onto a mobile APP (including the eDATS Mobile App with the integration feature with e-PEMS web based e-payment system).

(ii) The Design and development of the APP should be as per the Agile development methodology. The vendor will develop and present a non-functional prototype of the system to the client and obtain approval for each module. This will help in better user acceptance of the system.

(iii) The vendor will build on the approved prototype, the new system which will be fully functional at its own premises. The vendor must have its own Software Development Laboratory within its local premises with adequate Hardware and Software.

(iv) After the development is over, the apps and integration will be first tested from the vendor's side. Any reported bugs shall be fixed.

(v) The final testing of the software package will be done by the procuring agency. After the user acceptance test succeeds, the software will be deployed for live operation.

# 7. Backup and Recovery

The vendor must propose solutions for high availability and a model for data recovery with appropriate backup solutions.

# 8. Ownership of Source Code and other Intellectual Property

The Procuring Agency will be the rightful owner of the Source Code and all Intellectual Property associated with the system and they will have full rights over the ways they can use these resources. The information system so developed will be the sole property of the Procuring Agency or any agencies designated by them. The Software Development Vendor (SDV) will have no right to commercially use or apply the software elsewhere.

# 9. Re-engineering of the Processes

The vendor must try to re-engineer the processes wherever possible so that the system can be optimally utilized.

# 10. Obsolescence

The vendor undertakes to continuously and unfailingly advise the procuring agency of new technologies (hardware & system software) in regard to the Solution during the currency of this Contract. If the Client decides to introduce any such new technologies in replacement of the Solution or along with the Solution or as the case may be, the work that may arise therefrom shall be considered beyond the purview of this Contract.

# 11. Naming Convention /Standard

In order to keep source codes organized, vendors must strictly follow standards for forms, reports, database, triggers, views, stored procedures, coding etc.

# 12. Collaboration, Partnerships with Foreign Firms & Subcontracting

(i)The local vendor is allowed for collaboration or partnership with the foreign firms on their own discretion. However, the procuring agency shall not have any stake with the foreign firms. The local vendor shall be fully responsible for the deliverables.

(ii) The vendor shall have local staff as key members in the project team which is necessary conditions to accept the proposal for evaluation.

(iii) The vendor awarded the contract shall not subcontract the awarded work partly or in full to any National/International Firms.

# 13. Quality of Work

The Vendor must ensure quality while implementing the system at all times.

# 14. Timely Completion

The entire work of software development, testing and knowledge transfer should be completed and ready for hosting within *[****77 days****]* from the date of receipt of letter of award. Please note that as this contract shall be funded from the World Bank, Multi Donor Fund; the time of completion cannot be extended beyond the project closing date of June 30, 2023.

# 15. Time Frame for completion (planned)

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Activities** | **Week 1** | **Week 2-5** | **Week 6-9** | **Week 10-11** |
| Study and Understand eDATS and ePEMS including GPS and Travel transaction category. Refer the SRS for the integration |  |  |  |  |
| Study, Understand, Develop SRS for mobile App, FS, Approval of SRS, FS, Develop non-functional prototype, testing, finalization and ready for hosting. |  |  |  |  |
| Installation in iOS and Android platform and ready for operation.  |  |  |  |  |
| Integration of the eDATS with e-PEMS |  |  |  |  |
| Development of Reports in eDATS, e-PEMS and eDATS Mobile App |  |  |  |  |

# 16. Minimum Mandatory Eligibility Criteria for Bidder

|  |  |  |
| --- | --- | --- |
| **Sl. No** | **Mandatory Requirement** | **Details** |
|  | Valid Trade License to perform the consultancy service in the software development.  | Bidder must be a Bhutanese IT firm |
| 2. | Valid Tax Clearance Certificate |  |
| 3. | Experience of the Firm | 1. Bidder must be a Bhutanese IT firm with a minimum 1 years of active existence in software development.
 |
| 4. | Technical Resources of the Firm | 1. Minimum of two local technical resource persons.
 |

# 17. Evaluation Criteria

If the mandatory requirements are not fulfilled, the consultant will be excluded from evaluation of the proposal.

The minimum technical score required to pass is 70%.

A. The criteria for technical proposal evaluation:

For the technical evaluation, the criteria, sub-criteria and points systems for evaluating the technical proposal are as follows:

|  |  |  |
| --- | --- | --- |
|  **Sl No** | **Criteria and Sub-Criteria** | **Score** |
| 1 | Specific experience of the firm relevant to the assignment  | 20 Points |
| **Specific experience of the firm relevant to the assignment (20 Points)**Developed above 2 ICT related projects like Mobile Apps / software development (100%)Developed 2 Projects (75%)Developed 1 Project (50%) |  |
| 2 | Adequacy of the proposed methodology and work plan in responding to the Terms of Reference  | 50 Points |
| **2.1 Understand of the Assignment in responding to Terms of Reference (25 Points)**Understanding on the Assignment, Methodology with regards to the Terms of Reference. The firm shall demonstrate clear understanding of the assignment topic, objectives and scope of the task and expected outcome, any technical requirements of this task. This should be demonstrated through a written technical proposal. (For this, there should be a detailed write-up (essay) on your understanding of the assignment and the presentation also should be made to the evaluation members) Note: Venue, Date and Time for the presentation will be informed to the firm during the evaluation  |  |
| **2.2 Technical Approach and Methodology and Work Plan in responding to Terms of Reference (25 Points)**Development methodology with technical details of logic and formulas required for reading, measuring and collecting the network parameters and work plan with regards to the Terms of Reference. Note: Venue, Date and Time for the presentation will be informed to the firm during the evaluation  |  |
| 3 | Key Professional staff qualifications and competence for the Assignment | 30 Points |
| **Lead Developer (20 Points)** **General Qualification (30% of 20 Points)**Minimum bachelor’s degree in the relevant field (6 Points)Above Master’s degree (100%)Master’s degree (75%)Bachelor’s degree (50%)**Adequacy for the Assignment (70% of 20 Points)**Implemented projects in ICT Related like Mobile App Development / software development (14 Points)Above 2 Projects (100%)2 Projects (75%)1 Project (50%)**Developer (10)** **General Qualification (30% of 10 Points)**Minimum bachelor’s degree in the relevant field (3 Points)Above Master’s degree (100%)Master’s degree (50%)Bachelor’s degree (25%)**Adequacy for the Assignment (70% of 10 Points)**Implemented projects in ICT Related like Mobile App Development / software development (7 Points)Above 2 Projects (100%)2 Projects (75%)1 Project (50%) |  |
|  | Total Point | 100 Points |

**Notes:**

1. In case key expert does not meet the minimum qualification criteria, the proposal of the firm will be declared as non-responsive.

2. Consultant's organization and experience should be submitted in the format given in the **Annexure I**.

3. Description of Approach, Methodology, Work Plan and Staffing for performing the assignment should be submitted as described in **Annexure II.**

4. Work Schedule and Planning for Deliverables should be submitted as per **Annexure III**.

5. Team Composition, Assignment and Key Expert input and CV should be submitted as per **Annexure IV**.

6. Any change of key personal after the award of consultancy will lead to termination of contract.

# 18. Payment Method:

It is a task based with timeline contract and the consultant shall be paid as per the work progress as detailed below. The rates quoted by the interested consultant shall be on lump sum basis and include all associated expenses related to the delivery of the services. Fee Claim: The consultant will work on lump sum cost basis and payment shall be made as per the following installments:

1. 10% of contract price on submission and acceptance of inception report D1
2. 30% of contract price on submission and acceptance of D2
3. 30% of contract price on submission and acceptance of D3
4. 30% of contract price on submission and acceptance of D4

# 19. Termination of Work

The contract shall be terminated if the selected consultant breaches any of the terms and conditions stipulated under the contract.

# 20. Award Letter and Contract Signing

1. If required, negotiations shall be conducted with the firms based on ranking.

**Annexure - I**

**FORM**

**CONSULTANT’S ORGANIZATION AND EXPERIENCE**

Form: a brief description of the Consultant’s organization and an outline of the recent experience of the Consultant that is most relevant to the assignment. In the case of a joint venture, information on similar assignments shall be provided for each partner. For each assignment, the outline should indicate the names of the Consultant’s Key Experts and Sub- consultants who participated, the duration of the assignment, the contract amount (total and, if it was done in a form of a joint venture or a sub-consultancy, the amount paid to the Consultant), and the Consultant’s role/involvement.

**A - Consultant’s Organization**

1. Provide here a brief description of the background and organization of the company and

– in case of a joint venture – of each member for this assignment.

1. Include organizational chart, a list of Board of Directors, and beneficial ownership

**B - Consultant’s Experience**

1. List only previous similar assignments successfully completed in the last 5years from last date of submission of EoI.
2. List only those assignments for which the Consultant was legally contracted by the Client as a company or was one of the joint venture partners. Assignments completed by the Consultant’s individual experts working privately or through other consulting firms cannot be claimed as the relevant experience of the Consultant, or that of the Consultant’s partners or sub-consultants, but can be claimed by the Experts themselves in their CVs. The Consultant should be prepared to substantiate the claimed experience by presenting copies of relevant documents and references if so requested by the Client.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Duration** | **Assignment name/& brief****description of main****deliverables/outputs** | **Name of Client****& Country of****Assignment** | **Approx. Contract value****(in US$ equivalent) / Amount paid to the Bidder** | **Role on the****Assignment** | **Reference no. (Page) of work order and completion certificate** |
|  |  |  |  |  |  |
| {e.g.,Jan.2009–Apr.2010} | {e.g., “Improvementquality of ”:designed master plan forrationalization of ;} | {e.g., Ministry of......, country} | {e.g., US$1mill/US$0.5 mill} | {e.g., Leadpartner in a JVA&B&C} |  |
|  |  |  |  |  |  |
| {e.g., Jan-May2008} | {e.g., “Support to sub-national government ”:drafted secondary levelregulations on. } | {e.g.,municipalityof ,country} | {e.g., US$0.2mil/US$0.2 mil} | {e.g., soleConsultant} |  |

**Note:**

1. Work Order, ToR/ Scope of work and Completion Certificate of consultancy assignments dully signed by client are to be attached with each completed assignment.
2. On-Going consultancy assignments/ project shall not be considered for evaluation

**Annexure - II**

**FORM**

**DESCRIPTION OF APPROACH, METHODOLOGY, AND WORK PLAN FOR**

**PERFORMING THE ASSIGNMENT**

Form: a description of the approach, methodology, and work plan for performing the

assignment, including a detailed description of the proposed methodology and staffing for training, if the Terms of Reference specify training as a specific component of the assignment.

1. ***Technical Approach, Methodology, and Organization of the Consultant’s team****.*

{Please explain your understanding of the objectives of the assignment as outlined in the Terms of Reference (TOR), the technical approach, and the methodology you would adopt for implementing the tasks to deliver the expected output(s); the degree of detail of such output; and describe the structure and composition of your team. Please do not repeat/copy the TORs inhere.}

1. ***Work Plan and Staffing***.

Please outline the plan for the implementation of the main activities/tasks of the assignment, their content and duration, phasing and interrelations, milestones (including interim approvals by the Client), and tentative delivery dates of the reports. The proposed work plan should be consistent with the technical approach and methodology, showing understanding of the TOR and ability to translate them into a feasible working plan and work schedule showing the assigned tasks for each expert. A list of the final documents (including reports) to be delivered as final output(s) should be included here. The work plan should be consistent with the Work Schedule Form.}

1. ***Comments (on the TOR and on counterpart staff and facilities)***

{Your suggestions should be concise and to the point, and incorporated in your Proposal. Please also include comments, if any, on counterpart staff and facilities to be provided by the Client. For example, administrative support, office space, local transportation, equipment, data, background reports, etc.}

**Annexure- III**

**FORM**

**WORK SCHEDULE AND PLANNING FOR DELIVERABLES**

|  |  |  |
| --- | --- | --- |
| **N°** | **Deliverables** 1 **(D-..)** | **Months** |
| **1** | **2** | **3** | **4** | **5** | **6** | **7** | **8** | **9** | **.....** | **n** | **TOTAL** |
| **D-1** | {e.g., Deliverable #1: Report A |  |  |  |  |  |  |  |  |  |  |  |  |
|  | 1) data collection |  |  |  |  |  |  |  |  |  |  |  |  |
|  | 2) drafting |  |  |  |  |  |  |  |  |  |  |  |  |
|  | 3) inception report |  |  |  |  |  |  |  |  |  |  |  |  |
|  | 4) incorporating comments |  |  |  |  |  |  |  |  |  |  |  |  |
|  | 5) ......................................... |  |  |  |  |  |  |  |  |  |  |  |  |
|  | 6) delivery of final report to Client} |  |  |  |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| **D-2** | {e.g.,Deliverable#2 } |  |  |  |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| **n** |  |  |  |  |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |  |  |  |  |

1. List the deliverables with the breakdown for activities required to produce them and other benchmarks such as the Client’s approvals. For phased assignments, indicate the activities, delivery of reports, and benchmarks separately for each phase.
2. Duration of activities shall be indicated in a form of a barchart.
3. Include a legend, if necessary, to help read the chart.

**Annexure IV**

**FORM**

**TEAM COMPOSITION, ASSIGNMENT, AND KEY EXPERTS’ INPUTS**

|  |  |  |  |
| --- | --- | --- | --- |
| **N°** | **Name** | **Expert’s input (in person/month) per each Deliverable (listed in TECH-5)** | **Total time-input** **(in months)** |
| **Position** |  | **D-1** |  | **D-2** |  | **D-3** | **........** |  | **D-...** |  |  |  | **Home** | **Field** | **Total** |
| **KEY EXPERTS** |
| K-1 | {e.g., Mr. Abbbb} | [Team Leader] | [*Home]* | [2 month] |  | [1.0] |  | [1.0] |  |  |  |  |  |  |  |  |  |
| [*Field*] | [0.5 m] | [2.5] | [0] |  |  |
| K-2 |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
|  |  |
| K-3 |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
|  |  |
|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
|  |  |
| n |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
|  |  |
|  | **Subtotal** |  |  |  |
| **NON-KEY EXPERTS** |
| N-1 |  |  | [*Home*] |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| [*Field*] |  |  |
| N-2 |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
|  |  |
|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
|  |  |
| n |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
|  |  |
|  | **Subtotal** |  |  |  |
| **Total** |  |  |  |

1. For Key Experts, the input should be indicated individually for the same positions as required under the Data Sheet ITC21.1.
2. Months are counted from the start of the assignment/mobilization. One (1) month equals twenty (20) working (billable) days. One working (billable) day shall be not less than eight (8) working (billable) hours.
3. “Home” means work in the office in the expert’s country of residence. “Field”work means work carried out in the Client’s country or any other country outside the expert’s country of residence.

**FORM**

**(Continued)**

**CURRICULUM VITAE (CV)**

|  |  |
| --- | --- |
| **Position Title and No.** | {e.g., K-1, TEAM LEADER} |
| **Name of Expert:** | {Insert full name} |
| **Date of Birth:** | {day/month/year} |
| **Country of Citizenship/Residence** |  |

**Education:** {List college/university or other specialized education, giving names of educational institutions, dates attended, degree(s)/diploma(s) obtained}

**Employment record relevant to the assignment:** {Starting with present position, list in reverse order. Please provide dates, name of employing organization, titles of positions held, types of activities performed and location of the assignment, and contact information of previous clients and employing organization(s) who can be contacted for references. Past employment that is not relevant to the assignment does not need to be included.}

|  |  |  |  |
| --- | --- | --- | --- |
| **Period** | **Employing organization and your title/position. Contact information and references** | **Country** | **Summary of activities performed relevant to****the Assignment** |
| [e.g., May 2005-present] | [e.g., Ministry of ……, advisor/consultant to…For references: Tel /e-mail……; Mr. Hbbbbb, deputy minister] |  |  |
|  |  |  |  |
|  |  |  |  |

**Membership in Professional Associations and Publications:**

**Language Skills (indicate only languages in which you can work):**

**Adequacy for the Assignment:**

|  |  |
| --- | --- |
| **Detailed Tasks Assigned on Consultant’s Team of Experts:** | **Reference to Prior Work/Assignments that Best Illustrates Capability to Handle the Assigned Tasks** |
| **{List all deliverables/tasks as in Annexure – III in which the Expert will be involved)** |  |
|  |  |
|  |  |

**Expert’s contact information:** (e-mail………………….,phone………………….)

Certification:

I, the undersigned, certify that to the best of my knowledge and belief, this CV correctly describes myself, my qualifications, and my experience, and I am available to undertake the assignment in case of an award. I understand that any misstatement or misrepresentation described herein may lead to my disqualification or dismissal by the Client, and/or sanctions by the Bank.

{day/month/year}

Name of Expert Signature Date

{day/month/year}

Name of authorized Signature

Representative of the Consultant Date

(the same who signs the Proposal)