SELECTION OF CONSULTANTS

REQUEST FOR PROPOSALS

RFP No.: [MAIL/MISFA/012015]

Selection of Consulting Services for:
Development of Management Information System (MIS) for MISFA

Microfinance Investment Support Facility for Afghanistan (MISFA)

Issued on: August/2015

TABLE OF CLAUSES

PART I 1
Section 1. Letter of Invitation 1
Section 2. Instructions to Consultants and Data Sheet 3
A. General Provisions 3
1. Definitions 3
2. Introduction 4
3. Conflict of Interest 4
4. Unfair Competitive Advantage 4
B. Preparation of Proposals 5
5. General Considerations 5
6. Cost of Preparation of Proposal 5
7. Language 5
8. Documents Comprising the Proposal 5
9. Only one proposal 5
10. Proposal Validity 5
11. Clarification of RFP 6
12. Preparation of Proposals-Specific Considerations 7
13. Technical Proposal Format & Content 7
14. Financial Proposal 8
C. Submission, Opening and Evaluation 8
15. Submission, Sealing, and Marking of Proposals 8
16. Confidentiality 9
17. Opening of Technical Proposals 10
18. Proposals Evaluation 10
19. Evaluation of Technical Proposals 10
20. Public Opening of Financial Proposals 11
21. Correction of Errors 11
22. Taxes 11
23. Combined Quality and Cost Evaluation 11
D. Negotiations and Award 12
24. Negotiation 12
25. Conclusion of Negotiation 12
26. Award of Contract 13
E. Data Sheet 14
Section 3. Technical Proposal – Standard Forms 19
1. **Checklist of Required Forms 19**
2. **Form TECH-1 .... 20**
3. **Form TECH-2 .... 22**

4. **Form TECH-3 .... 24**
5. **Form TECH-4 .... 25**
6. **Form TECH-5 .... 26**
7. **Form TECH-6 .... 27**

Section 4. Financial Proposal - Standard Forms 31

Section 5. Terms of Reference 39

I. Appendices 53

Appendix A – Terms of Reference 53

Appendix B - Key Experts 53

Appendix C – Breakdown of Contract Price 53

PART I

Section 1. Letter of Invitation

RFP No. ***MAIL/MISFA/012015***
IFAD Grant No. DSF-8033-AF

Development of Management Information System for MISFA

1. The GoIRA (the Recipient) has been allocated grant funds (the "Grant") from the International Fund for Agriculture Development (IFAD) and executed by the Rural Microfinance and Livestock Support Programme (RMLSP) of the Ministry of Agriculture, Irrigation and Livestock (MAIL) through MISFA.
2. The Microfinance Investment Support Facility for Afghanistan (MISFA) intends to apply the funds to eligible payments under the contract for *Development of Management Information System for MISFA f*or which this Request for Proposals is issued. Payments by the Donor will be made only at the request of MISFA and upon approval by the Donor, and will be subject, in all respects, to the terms and conditions of the grant agreement. No party other than the Borrower shall derive any rights from the grant agreement or have any claims to the proceeds of the grant.

3. MISFA now invites proposals to provide the following services (hereinafter called "Services"): *Development of Management Information System for MISFA*.

4. The firm will be selected under a competitive process and in a Full Technical Proposal (FTP) format as described in this RFP.

5. The RFP includes the following documents:

   Section 1 - Letter of Invitation
   Section 2 - Instructions to Consultants and Data Sheet
   Section 3 - Technical Proposal Forms
   Section 4 - Financial Proposal Forms
   Section 5 - Terms of Reference

6. Please submit your proposals (both Technical and Financial) in separate and sealed envelopes, clearly mentioning Technical & Financial Proposals with the number of copies as specified in the Data Sheet to the address below and not later than: **30/Sept/2015, 2:00PM Kabul Local Time.**

Address:

Mohammad Khalid Abid, Procurement Specialist
Microfinance Investment Support Facility for Afghanistan (MISFA)
House # 195, Esmat Muslim Street, Shahr-e-Naw, Kabul Afghanistan

7. Details on the proposal’s submission date, time and address are provided in Clauses15.7and 15.9 of the ITC.

Section 2. Instructions to Consultants and Data Sheet

A. General Provisions

1. Definitions

(a) "Applicable Law" means the laws and any other instruments having the force of law in the Client's country, or in such other country as may be specified in the **Data Sheet**, as they may be issued and in force from time to time.

(b) "Borrower" means the Government, Government agency or other entity that signs the (loan/financing/grant) agreement with the Donor.

(c) "Client" means the implementing agency that signs the Contract for the Services with the selected Consultant.

(d) "Contract" means a legally binding written agreement signed between Client and the Consultant and includes all the attached documents as the General Conditions of Contract (GCC) and the Special Conditions of Contract (SCC).

(e) "Data Sheet" means an integral part of the Instructions to Consultants (ITC) Section 2 that is used to reflect specific country and assignment related conditions to supplement, but not to over-write, the provisions of the ITC.

(f) "Day" means a calendar day.

(g) "Experts" means, collectively, Key Experts, Non-Key Experts, or any other personnel of the Consultant(s).

(h) "Government" means the government of the Client's country.

(i) "Key Expert(s)" means an individual professional whose skills, qualifications, knowledge and experience are critical to the performance of the Services under the Contract and whose CV is taken into account in the technical evaluation of the proposal.

(j) "LOI" (this Section 1 of the RFP) means the Letter of Invitation being sent by Client to the Consultants.

(k) "Proposal" means the Technical Proposal and the Financial Proposal of the Consultant.

(l) "RFP" means the Request for Proposals to be prepared by Client for the selection of Consultants.

(m) "Services" means the work to be performed by the Consultant pursuant to the Contract.

(n) "TORs" (this Section 5 of the RFP) means the Terms of Reference that explain the objectives, scope of work, activities, and tasks to be performed, respective responsibilities of Client and the Consultant, and expected results and deliverables of the assignment.

2. Introduction

2.1 The client as named in the **Data Sheet** intends to select a Consultant for the assignment through this Request for Proposal (RFP), in accordance with the method of selection specified in the **Data Sheet**.

2.2 The Consultants are invited to submit a Technical Proposal and a Financial Proposal, or a Technical Proposal only, as specified in the **Data Sheet**, for consulting services required for the assignment named in the **Data Sheet**. The Proposal will be the basis for negotiating and ultimately signing the Contract with the selected Consultant.

2.3 The Consultants should familiarize themselves with the local conditions and take them into account in preparing their Proposals; including attending a pre-proposal conference if one is specified in the **Data Sheet**. Attending any such pre-proposal conference is optional and is at the Consultants' expense.

2.4 The client will provide, at no cost to the selected Consultant, the inputs, relevant project data, and reports required for the successful implementation of the Project as specified in the **Data Sheet**.

3. Conflict of Interest

3.1 The Consultant is required to provide professional, objective, and impartial advice, at all times holding client's interests paramount, strictly avoiding conflicts with other assignments or its own corporate interests, and acting without any consideration for future work.

3.2 The Consultant has an obligation to disclose to the client any situation of actual or potential conflict that impacts its capacity to serve the best interest of the client. Failure to disclose such situations may lead to the disqualification of the Consultant or the termination of its Contract.

4. Unfair Competitive

4.1 Fairness and transparency in the selection process require that the Consultants or their Affiliates competing for a specific

	Advantage	assignment do not derive a competitive advantage from having provided consulting services related to the assignment in question. To that end, the client shall indicate in the **Data Sheet** and make available to all Consultants together with this RFP all information that would in that respect give such Consultant any unfair competitive advantage over competing Consultants.

B. Preparation of Proposals

5.	**General Considerations**	**5.1** In preparing the Proposal, the Consultant is expected to examine the RFP in detail. Material deficiencies in providing the information requested in the RFP may result in rejection of the Proposal.
6.	**Cost of Preparation of Proposal**	**6.1** The Consultant shall bear all costs associated with the preparation and submission of its Proposal and the client shall not be responsible or liable for those costs, regardless of the conduct or outcome of the selection process. The client is not bound to accept any proposal, and reserves the right to annul the selection process at any time prior to Contract award, without thereby incurring any liability to the Consultant.
7.	**Language**	**7.1** The Proposal, as well as all correspondence and documents relating to the Proposal exchanged between the Consultant and the client shall be written in the language(s) specified in the Data Sheet.
8.	**Documents Comprising the Proposal**	**8.1** The Proposal shall comprise the documents and forms listed in the **Data Sheet**. **8.2** If specified in the **Data Sheet**, the Consultant shall include a statement of an undertaking of the Consultant to observe, in competing for and executing a contract, the Client country's laws against fraud and corruption (including bribery). **8.3** The Consultant shall furnish information on commissions, gratuities, and fees, if any, paid or to be paid to agents or any other party relating to this Proposal and, if awarded, Contract execution, as requested in the Financial Proposal submission form (Section 4).
9.	**Only one proposal**	**9.1** The Consultant shall submit only one Proposal in its own name. If a Consultant submits or participates in more than one proposal, all such proposals shall be disqualified and rejected.
10.	**Proposal Validity**	**10.1 The Data Sheet** indicates the period during which the Consultant's Proposal must remain valid after the Proposal

submission deadline.

10.2 During this period, the Consultant shall maintain its original Proposal without any change, including the availability of the Key Experts, the proposed rates and the total price.

10.3 If it is established that any Key Expert nominated in the Consultant's Proposal was not available at the time of Proposal submission or was included in the Proposal without his/her confirmation, such Proposal shall be disqualified and rejected for further evaluation, and may be subject to sanctions in accordance with Clause 5 of this ITC.

a. Extension of Validity Period

10.4 The client will make its best effort to complete the negotiations within the proposal's validity period. However, should the need arise, the client may request, in writing, all Consultants who submitted Proposals prior to the submission deadline to extend the Proposals' validity.

10.5 If the Consultant agrees to extend the validity of its Proposal, it shall be done without any change in the original Proposal and with the confirmation of the availability of the Key Experts.

10.6 The Consultant has the right to refuse to extend the validity of its Proposal in which case such Proposal will not be further evaluated.

b. Substitution of Key Experts at Validity Extension

10.7 If any of the Key Experts become unavailable for the extended validity period, the Consultant shall provide a written adequate justification and evidence satisfactory to the client together with the substitution request. In such case, a replacement Key Expert shall have equal or better qualifications and experience than those of the originally proposed Key Expert. The technical evaluation score, however, will remain to be based on the evaluation of the CV of the original Key Expert.

10.8 If the Consultant fails to provide a replacement Key Expert with equal or better qualifications, or if the provided reasons for the replacement or justification are unacceptable to the client, such Proposal will be rejected.

c. Sub-Contracting

10.9 The Consultant shall not subcontract the Services.

11. Clarification of RFP

11.1 The Consultant may request a clarification of any part of the RFP during the period indicated in the **Data Sheet** before the Proposals' submission deadline. Any request for clarification must be sent in writing, or by standard electronic means, to the client's address indicated in the **Data Sheet**. The client will respond in writing, or by standard electronic means.

11.2 At any time before the proposal submission deadline, the client may amend the RFP by issuing an amendment. The amendment shall be published through the same route so that all prospective Consultants will have access to.

11.3 If the amendment is substantial, the client may extend the proposal submission deadline to give the Consultants reasonable time to take an amendment into account in their Proposals.

11.4 The Consultant may submit a modified Proposal or a modification to any part of it at any time prior to the proposal submission deadline. No modifications to the Technical or Financial Proposal shall be accepted after the deadline.

12. Preparation of Proposals-Specific Considerations

12.1 While preparing the Proposal, the Consultant must give particular attention to the following:

12.2 If a Consultant considers that it may enhance its expertise for the assignment by associating with other Consultants in the form of a Joint Venture or as Sub-consultants, it may do so, if permitted in the **Data Sheet**. In all such cases a Consultant must obtain the written approval of the client prior to the submission of the Proposal.

12.3 The client may indicate in the **Data Sheet** the estimated Key Experts' time input (expressed in person-month) or the client's estimated total cost of the assignment, but not both. This estimate is indicative and the Proposal shall be based on the Consultant's own estimates for the same.

12.4 If stated in the **Data Sheet**, the Consultant shall include in its Proposal at least the same time input (in the same unit as indicated in the **Data Sheet**) of Key Experts, failing which the Financial Proposal will be adjusted for the purpose of comparison of proposals and decision for award in accordance with the procedure in the **Data Sheet**.

12.5 For assignments under the Fixed-Budget selection method, the estimated Key Experts' time input is not disclosed. Total available budget, with an indication whether it is inclusive or exclusive of taxes, is given in the **Data Sheet**, and the Financial Proposal shall not exceed this budget.

13. Technical Proposal Format & Content

13.1 The Technical Proposal shall not include any financial information. A Technical Proposal containing material financial information shall be declared non-responsive.

13.2 Consultant shall not propose alternative Key Experts. Only one CV shall be submitted for each Key Expert position. Failure to comply with this requirement will make the Proposal non-responsive.

13.3 Depending on the nature of the assignment, the Consultant is required to submit a Full Technical Proposal (FTP), or a Simplified Technical Proposal (STP) as indicated in the **Data Sheet** and using the Standard Forms provided in Section 3 of the RFP.

14. Financial Proposal

14.1 The Financial Proposal shall be prepared using the Standard Forms provided in Section 4 of the RFP. It shall list all costs associated with the assignment, including (a) remuneration for Key Experts and Non-Key Experts, (b) reimbursable expenses.

a. Taxes

14.2 The Consultant and its and Experts are responsible for meeting all tax liabilities arising out of the Contract unless stated otherwise in the **Data Sheet**. Information on taxes in the Client's country is provided in the **Data Sheet**.

b. Currency of Proposal

14.3 The Consultant may express the price for its Services in the currency as stated in the **Data Sheet**.

c. Currency of Payment

14.4 Payment under the Contract shall be made in the currency in which the payment is requested in the Proposal.

C. Submission, Opening and Evaluation

15. Submission, Sealing, and Marking of Proposals

15.1 The Consultant shall submit a signed and complete Proposal comprising the documents and forms in accordance with Clause 8 (Documents Comprising Proposal). The submission can be done by mail or by hand. If specified in the **Data Sheet**, the Consultant has the option of submitting its Proposals electronically.

15.2 An authorized representative of the Consultant shall sign the original submission letters in the required format for both the Technical Proposal and, if applicable, the Financial Proposal and shall initial all pages of both. The authorization shall be in the form of a written power of attorney attached to the Technical Proposal.

15.3 Any modifications, revisions, interlineations, erasures, or overwriting shall be valid only if they are signed or initialed by the person signing the Proposal.

15.4 The signed Proposal shall be marked "ORIGINAL", and its copies marked "COPY" as appropriate. The number of copies is indicated in the **Data Sheet**. All copies shall be made from the signed original. If there are discrepancies between the original and the copies, the original shall prevail.

15.5 The original and all the copies of the Technical Proposal shall be placed inside of a sealed envelope clearly marked "**TECHNICAL PROPOSAL**", "[Name of the Assignment]", reference number, name and address of the Consultant, and with a warning "**DO NOT OPEN UNTIL [INSERT THE DATE AND THE TIME OF THE TECHNICAL PROPOSAL SUBMISSION DEADLINE]**."

15.6 Similarly, the original Financial Proposal (if required for the applicable selection method) shall be placed inside of a sealed envelope clearly marked "**FINANCIAL PROPOSAL**" followed by the name of the assignment, reference number, name and address of the Consultant, and with a warning "**DO NOT OPEN WITH THE TECHNICAL PROPOSAL**."

15.7 The sealed envelopes containing the Technical and Financial Proposals shall be placed into one outer envelope and sealed. This outer envelope shall bear the submission address, RFP reference number, the name of the assignment, Consultant's name and the address, and shall be clearly marked "**DO NOT OPEN BEFORE** [insert the time and date of the submission deadline indicated in the Data Sheet]".

15.8 If the envelopes and packages with the Proposal are not sealed and marked as required, the client will assume no responsibility for the misplacement, loss, or premature opening of the Proposal.

15.9 The Proposal or its modifications must be sent to the address indicated in the **Data Sheet** and received by the client no later than the deadline indicated in the **Data Sheet**, or any extension to this deadline. Any Proposal or its modification received by the client after the deadline shall be declared late and rejected, and promptly returned unopened.

16. Confidentiality

16.1 From the time the Proposals are opened to the time the Contract is awarded, the Consultant should not contact the client on any matter related to its Technical and/or Financial Proposal. Information relating to the evaluation of Proposals and award recommendations shall not be disclosed to the Consultants who submitted the Proposals or to any other party not officially concerned with the process, until the publication of the Contract award information.

16.2 Any attempt by Consultants or anyone on behalf of the Consultant to influence improperly the client in the evaluation of the Proposals or Contract award decisions may result in the rejection of its Proposal.

16.3 Notwithstanding the above provisions, from the time of the Proposals' opening to the time of Contract award, if an Consultant wishes to contact the client on any matter related to the selection process, it should do so only in writing if specified in the **Data Sheet**.

17. Opening of Technical Proposals

17.1 The client's evaluation committee shall conduct the opening of the Technical Proposals in the presence of the Consultants' authorized representatives who choose to attend (in person, or online if this option is offered in the **Data Sheet**). The opening date, time and the address are stated in the **Data Sheet**. The envelopes with the Financial Proposal shall remain sealed and shall be securely stored until they are opened in accordance with Clause 20 of the ITC.

17.2 At the opening of the Technical Proposals the following shall be read out: (i) the name and the country of the Consultant; (ii) the presence or absence of a duly sealed envelope with the Financial Proposal; (iii) any modifications to the Proposal submitted prior to proposal submission deadline; and (iv) any other information deemed appropriate or as indicated in the **Data Sheet**.

18. Proposals Evaluation

18.1 Subject to provision of Clause 13.1 of the ITC, the evaluators of the Technical Proposals shall have no access to the Financial Proposals until the technical evaluation is concluded.

18.2 The Consultant is not permitted to alter or modify its Proposal in any way after the proposal submission deadline except as permitted under Clause 12.7 of this ITC. While evaluating the Proposals, the client will conduct the evaluation solely on the basis of the submitted Technical and Financial Proposals.

19. Evaluation of Technical Proposals

19.1 The client's evaluation committee shall evaluate the Technical Proposals on the basis of their responsiveness to the Terms of Reference and the RFP, applying the evaluation criteria, sub-criteria, and point system specified in the **Data Sheet**. Each responsive Proposal will be given a technical score. A Proposal shall be rejected at this stage if it does not respond to important aspects of the RFP or if it fails to achieve the minimum technical score indicated in the **Data Sheet**.

20. Public Opening of Financial Proposals

20.1 After the technical evaluation is completed, the client shall notify those Consultants whose Proposals were considered non-responsive to the RFP and TOR or did not meet the minimum qualifying technical score (and shall provide information relating to the Consultant's overall technical score, as well as scores obtained for each criterion and sub-criterion) that their Financial Proposals will be returned unopened after completing the selection process and Contract signing. The client shall simultaneously notify in writing those Consultants that have achieved the minimum overall technical score and inform them of the date, time and location for the opening of the Financial Proposals. The opening date should allow the Consultants sufficient time to make arrangements for attending the opening. The Consultant's attendance at the opening of the Financial Proposals (in person, or online if such option is indicated in the **Data Sheet**) is optional and is at the Consultant's choice.

20.2 The Financial Proposals shall be opened by the client's evaluation committee in the presence of the representatives of those Consultants whose proposals have passed the minimum technical score. At the opening, the names of the Consultants, and the overall technical scores, including the break-down by criterion, shall be read aloud. The Financial Proposals will then be inspected to confirm that they have remained sealed and unopened. These Financial Proposals shall be then opened, and the total prices read aloud and recorded.

21. Correction of Errors

21.1 Activities and items described in the Technical Proposal but not priced in the Financial Proposal, shall be assumed to be included in the prices of other activities or items, and no corrections are made to the Financial Proposal.

22. Taxes

22.1 The client's evaluation of the Consultant's Financial Proposal shall exclude taxes and duties in the Client's country in accordance with the instructions in the **Data Sheet**.

23. Combined Quality and Cost Evaluation

Quality and Cost Based Selection

23.1 In the case of Quality and Cost Based Selection, the total score is calculated by weighting the technical and financial scores and adding them as per the formula and instructions in the **Data Sheet**. The consultant achieving the highest combined technical and financial score will be invited for negotiation.

D. Negotiations and Award

24. Negotiation

24.1 The negotiations will be held at the date and address indicated in the **Data Sheet** with the Consultant's representative(s) who must have written power of attorney to negotiate and sign a Contract on behalf of the Consultant.

24.2 The client shall prepare minutes of negotiations that are signed by the client and the Consultant's authorized representative.

a. Availability of Key Experts

24.3 The invited Consultant shall confirm the availability of all Key Experts included in the Proposal as a pre-requisite to the negotiations, or, if applicable, a replacement in accordance with Clause 10 of the ITC. Failure to confirm the Key Experts' availability may result in the rejection of the Consultant's Proposal and the client proceeding to negotiate the Contract with the next-ranked Consultant.

24.4 Notwithstanding the above, the substitution of Key Experts at the negotiations may be considered if due solely to circumstances outside the reasonable control of and not foreseeable by the Consultant, including but not limited to death or medical incapacity. In such case, the Consultant shall offer a substitute Key Expert within the period of time specified in the letter of invitation to negotiate the Contract, who shall have equivalent or better qualifications and experience than the original candidate.

b. Technical negotiations

24.5 The negotiations include discussions of the Terms of Reference (TORs), the proposed methodology, the client's inputs, the special conditions of the Contract, and finalizing the "Description of Services" part of the Contract. These discussions shall not substantially alter the original scope of services under the TOR or the terms of the contract, lest the quality of the final product, its price, or the relevance of the initial evaluation be affected.

c. Financial negotiations

24.6 The negotiations include each budgetary item, entire proposed budget, and the clarification of the Consultant's tax liability in the Client's country and how it should be reflected in the Contract.

25. Conclusion of Negotiation

25.1 The negotiations are concluded with a review of the finalized draft Contract, which then shall be initialled by the client and the Consultant's authorized representative.

25.2 If the negotiations fail, the client shall inform the Consultant in writing of all pending issues and disagreements and provide a final opportunity to the Consultant to respond. If disagreement persists, the client shall terminate the negotiations informing the Consultant of the reasons for doing so. The client will invite the next-ranked Consultant to negotiate a Contract. Once the client commences negotiations with the next-ranked Consultant, the client shall not reopen the earlier negotiations.

26. Award of Contract

26.1 After completing the negotiations, the client shall prepare a draft Contract, if applicable; and then sign the Contract in two original copies.

26.2 The Consultant is expected to commence the assignment on the date and at the location specified in the **Data Sheet**.

Instructions to Consultants

E. Data Sheet

A. General	
ITC Clause Reference	
2.1	Name of the Client: **Microfinance Investment Support Facility for Afghanistan (MISFA)**
2.2	Financial Proposal to be submitted together with Technical Proposal: **Yes**. The name of the assignment is: **Development of Management Information System (MIS) for MISFA**
2.3	A pre-proposal conference will be held: **No**
2.4	N/A
B. Preparation of Proposals	
7.1	This RFP has been issued in English language. Proposals shall be submitted in English. All correspondence exchange shall be in English.
8.1	**The Proposal shall comprise the following**: **<u>For FULL TECHNICAL PROPOSAL (FTP):</u>** **1st Inner Envelope with the Technical Proposal:** (1) Power of Attorney to sign the Proposal (2) TECH-1 (3) TECH-2 (4) TECH-3 (5) TECH-4 (6) TECH-5 (7) TECH-6 AND **2nd Inner Envelope with the Financial Proposal:** (1) FIN-1 (2) FIN-2 (3) FIN-3

	(4) FIN-4 (5)Statement of Undertaking (if required under Data Sheet 8.2 below)
8.2	Statement of Undertaking is required **Yes**
9.1	Participation of Sub-consultants, Key Experts and Non-Key Experts in more than one Proposal is permissible. **No**
10.1	Proposals must remain valid for **ninety (90)** calendar days after the proposal submission deadline.
11.1	Clarifications may be requested no later than **Five (5)** days prior to the submission deadline. The contact information for requesting clarifications is: Mohammad Khalid Abid, Procurement Specialist Microfinance Investment Support Facility for Afghanistan (MISFA) House # 195, Esmat Muslim Street, Shahr-e-Naw, Kabul Afghanistan E-mail: khalid.abid@misfa.org.af
12.2	JV (Joint Venture) is **Not** allowed.
12.5	**Not Applicable**
14.2	Information on the tax obligations in the Client's country can be found at *www.mof.gov.af*/taxes
14.3	The Financial Proposal shall be stated in **AFN or USD**
C. Submission, Opening and Evaluation	
15.1	The Consultant has the option of submitting their Proposals electronically.
15.4	**The Consultant must submit:** (a) **Technical Proposal:** one (1) original and two (2) copies; (b) **Financial Proposal:** one (1) original.
15.7 and 15.9	The Proposals must be submitted no later than: **Date:** 30/September/2015 **Time:** 02:00PM, Local time ____________________ The Proposal submission address is: Mohammad Khalid Abid, Procurement Specialist

	Microfinance Investment Support Facility for Afghanistan (MISFA) House # 195, Esmat Muslim Street, Shahr e Naw, Kabul, Afghanistan.
17.1	An online option of the opening of the Technical Proposals is offered: **No** **The opening for technical proposals shall take place at:** Microfinance Investment Support Facility for Afghanistan (MISFA) Office House # 195, Esmat Muslim Street, Shahr e Naw, Kabul, Afghanistan. **Date: 30/September/2015** **Time**: **02:00PM**
17.2	In addition, the following information will be read aloud at the opening of the Technical Proposals: **N/A**
19.1 (for FTP)	Criteria, sub-criteria, and point system for the evaluation of the Full Technical Proposals: Points (i) **Specific experience of the Consultant (as a firm) relevant to the Assignment:** *[10]* (ii) **Adequacy and quality of the proposed methodology, and work plan in responding to the Terms of Reference (TORs):** *a) Technical approach and methodology* *[25]* *b) Work plan* *[10]* *c) Organization and staffing* *[5]* **Total points for criterion (ii) is: 40** (iii) **Key Experts' qualifications and competence for the Assignment:** *a) Position1: Project Manager* *[10]* *b) Position2: System Analyst* *[8]* *c) Position3: System Design Specialist* *[8]* *d) Position4: Software Developer* *[8]* *e) Position5: GIS Specialist/Programmer* *[6]* **Total points for criterion (iii) is: 40** The number of points to be assigned to each of the above positions shall be determined considering the following two sub-criteria and relevant percentage weights: 1) General qualifications(general education, training, and experience): *40%*

	2) Adequacy for the Assignment(relevant education, training, experience in the sector/similar assignments): *60%* Total weight: 100% (iv) **Transfer of knowledge** (as project staff will be trained during the assignment, as mentioned in the TOR). *[10]* **Total points for all four criteria: 100** **Total points for the three criteria*:* 100** **The minimum technical score (St) required to pass is:[65]**
20.1	An online option of the opening of the Financial Proposals is offered: **No**.
22.1	For the purpose of the evaluation, MISFA will exclude: (a) all local identifiable indirect taxes such as sales tax, excise tax, VAT, or similar taxes levied on the contract's invoices; and (b) all additional local indirect tax on the remuneration of services rendered by non-resident experts in the Client's country. If a Contract is awarded, at Contract negotiations, all such taxes will be discussed, finalized (using the itemized list as a guidance but not limiting to it) and added to the Contract amount as a separate line, also indicating which taxes shall be paid by the Consultant and which taxes are withheld and paid by MISFA on behalf of the Consultant.
23.1	**The lowest evaluated Financial Proposal (Fm) is given the maximum financial score (Sf) of 100.** **The formula for determining the financial scores (Sf) of all other Proposals is calculated as following:** Sf = 100 x Fm/ F, in which "Sf" is the financial score, "Fm" is the lowest price, and "F" the price of the proposal under consideration. **The weights given to the Technical (T) and Financial (P) Proposals are**: **T = _______**[***80***], and **P = ________**[***20***] Proposals are ranked according to their combined technical (St) and financial (Sf) scores using the weights (T = the weight given to the Technical Proposal; P = the weight given to the Financial Proposal; T + P = 1) as following: S = St x T% + Sf x P%.

	D. Negotiations and Award
24.1	Expected date and address for contract negotiations: Date: *Within Two Weeks after selection of the Consultant for the assignment* Address: Microfinance Investment Support Facility for Afghanistan (MISFA) Office House # 195, Esmat Muslim Street, Shahr e Naw, Kabul, Afghanistan.
26.2	**Expected date for the commencement of the Services:** **Date:** Within a month after signing the contract.

Section 3. Technical Proposal – Standard Forms

{<u>Notes to Consultant</u> shown in brackets { } throughout Section 3 provide guidance to the Consultant to prepare the Technical Proposal; they should not appear on the Proposals to be submitted.}

CHECKLIST OF REQUIRED FORMS

Required for FTP (√)		FORM	DESCRIPTION	*Page Limit*
FTP				
√		TECH-1	Technical Proposal Submission Form.	
"√ " If applicable		TECH-1 Attachment	If the Proposal is submitted by a joint venture, attach a letter of intent or a copy of an existing agreement.	
"√" If applicable		Power of Attorney	No pre-set format/form. In the case of a Joint Venture, several are required: a power of attorney for the authorized representative of each JV member, and a power of attorney for the representative of the lead member to represent all JV members	
√		TECH-2	Consultant's Organization and Experience.	
√		TECH-2A	A. Consultant's Organization	
√		TECH-2B	B. Consultant's Experience	
√		TECH-3	Comments or Suggestions on the Terms of Reference and on Counterpart Staff and Facilities to be provided by the client.	
√		TECH-3A	A. On the Terms of Reference	
√		TECH-3B	B. On the Counterpart Staff and Facilities	
√	√	TECH-4	Description of the Approach, Methodology, and Work Plan for Performing the Assignment	
√	√	TECH-5	Work Schedule and Planning for Deliverables	
√	√	TECH-6	Team Composition, Key Experts Inputs, and attached Curriculum Vitae (CV)	

All pages of the original Technical and Financial Proposal shall be initialled by the same authorized representative of the Consultant who signs the Proposal.

FORM TECH-1

TECHNICAL PROPOSAL SUBMISSION FORM

{Location, Date}

To: *[Name and address of Client]*

Dear Sirs:

We, the undersigned, offer to provide the consulting services for *[Insert title of assignment]* in accordance with your Request for Proposals dated *[Insert Date]* and our Proposal. *[Select appropriate wording depending on the selection method stated in the RFP:* "We are hereby submitting our Proposal, which includes this Technical Proposal and a Financial Proposal sealed in a separate envelope" *or, if only a Technical Proposal is invited* "We hereby are submitting our Proposal, which includes this Technical Proposal only in a sealed envelope.*"].*

We hereby declare that:

(a) All the information and statements made in this Proposal are true and we accept that any misinterpretation or misrepresentation contained in this Proposal may lead to our disqualification by the client.

(b) Our Proposal shall be valid and remain binding upon us for the period of time specified in the Data Sheet, Clause 10.1.

(c) We have no conflict of interest in accordance with ITC 3.

(f) Except as stated in the Data Sheet, Clause 10.1, we undertake to negotiate a Contract on the basis of the proposed Key Experts. We accept that the substitution of Key Experts for reasons other than those stated in ITC Clause 10 and ITC Clause 24.4 may lead to the termination of Contract negotiations.

(g) Our Proposal is binding upon us and subject to any modifications resulting from the Contract negotiations.

We undertake, if our Proposal is accepted and the Contract is signed, to initiate the Services related to the assignment no later than the date indicated in Clause 26.2 of the Data Sheet.

We understand that the client is not bound to accept any Proposal that the client receives.

We remain,

Yours sincerely,

Authorized Signature {In full and initials}:_______________________________
Name and Title of Signatory: ____
Name of Consultant (company's name or JV's name):
In the capacity of: ____

Address: ____
Contact information (phone and e-mail): ________________________________

FORM TECH-2(FOR FULL TECHNICAL PROPOSAL ONLY)

CONSULTANT'S ORGANIZATION AND EXPERIENCE

Form TECH-2: 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. For each assignment, the outline should indicate the names of the Consultant's Key Experts 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 your company.

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

B - Consultant's Experience

1. List only previous <u>similar</u> assignments successfully completed in the last **[3]** years.

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 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 your firm**	**Role on the Assignment**
{e.g., Jan.2009–Apr.2010}	{e.g., "Improvement quality of..............": designed master plan for rationalization of ....; }	{e.g., Ministry of ......, country}	{e.g., US$1 mill/US$0.5 mill}	{e.g., Lead partner in a JV A&B&C}
{e.g., Jan-May 2008}	{e.g., "Support to sub-national government....." : drafted secondary level regulations on..............}	{e.g., municipality of........., country}	{e.g., US$0.2 mil/US$0.2 mil}	{e.g., sole Consultant}

FORM TECH-3 (FOR FULL TECHNICAL PROPOSAL)

COMMENTS AND SUGGESTIONS ON THE TERMS OF REFERENCE, COUNTERPART STAFF, AND FACILITIES TO BE PROVIDED BY THE CLIENT

Form TECH-3: comments and suggestions on the Terms of Reference that could improve the quality/effectiveness of the assignment; and on requirements for counterpart staff and facilities, which are provided by the client, including: administrative support, office space, local transportation, equipment, data, etc.

A - On the Terms of Reference

{Improvements to the Terms of Reference, if any}

B - On Counterpart Staff and Facilities

{Comments on counterpart staff and facilities to be provided by the client. For example, administrative support, office space, local transportation, equipment, data, background reports, etc., if any}

FORM TECH-4 (FOR FULL TECHNICAL PROPOSAL ONLY)

DESCRIPTION OF APPROACH, METHODOLOGY, AND WORK PLAN IN RESPONDING TO THE TERMS OF REFERENCE

Form TECH-4: 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.

{Suggested structure of your Technical Proposal (in FTP format):

a) Technical Approach and Methodology
b) Work Plan
c) Organization and Staffing}

a) ***Technical Approach and Methodology.***{Please explain your understanding of the objectives of the assignment as outlined in the Terms of Reference (TORs), the technical approach, and the methodology you would adopt for implementing the tasks to deliver the expected output(s), and the degree of detail of such output. Please do not repeat/copy the TORs in here.}

b) ***Work Plan.***{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 your understanding of the TOR and ability to translate them into a feasible working plan. 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.}

c) ***Organization and Staffing.***{Please describe the structure and composition of your team, including the list of the Key Experts, Non-Key Experts and relevant technical and administrative support staff.}

FORM TECH-5(FOR FTP AND STP)

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 <u>in a form of a bar chart</u>.
3. Include a legend, if necessary, to help read the chart.

FORM TECH-6(FOR FTP AND STP)

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 two (22)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.

Fu[redacted]put
Pa[illegible]put

FORM TECH-6
(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 info for 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 TECH- 5 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.

{day/month/year}

Name of Expert Signature Date

{day/month/year}

Name of authorized Representative of the Consultant (the same who signs the Proposal) Signature Date

Section 4. Financial Proposal - Standard Forms

{*Notes to Consultant* shown in brackets { } provide guidance to the Consultant to prepare the Financial Proposals; they should not appear on the Financial Proposals to be submitted.}

Financial Proposal Standard Forms shall be used for the preparation of the Financial Proposal according to the instructions provided in Section 2.

FIN-1 Financial Proposal Submission Form

FIN-2 Summary of Costs

FIN-3 Breakdown of Remuneration, including Appendix A "Financial Negotiations - Breakdown of Remuneration Rates" in the case of QBS method

FIN-4 Reimbursable expenses

FORM FIN-1
FINANCIAL PROPOSAL SUBMISSION FORM

{Location, Date}

To: [Name and address of Client]

Dear Sirs:

We, the undersigned, offer to provide the consulting services for [Insert title of assignment] in accordance with your Request for Proposal dated [Insert Date] and our Technical Proposal.

Our attached Financial Proposal is for the amount of {Indicate the corresponding to the amount(s) currency(ies)}{Insert amount(s) in words and figures}, *[Insert "including" or "excluding"] of all indirect local taxes in accordance with Clause 22.1 in the Data Sheet.* The estimated amount of local indirect taxes is {Insert currency} {Insert amount in words and figures} which shall be confirmed or adjusted, if needed, during negotiations. {Please note that all amounts shall be the same as in Form FIN-2}.

Our Financial Proposal shall be binding upon us subject to the modifications resulting from Contract negotiations, up to expiration of the validity period of the Proposal, i.e. before the date indicated in Clause 10.1 of the Data Sheet.

Commissions and gratuities paid or to be paid by us to an agent or any third party relating to preparation or submission of this Proposal and Contract execution, paid if we are awarded the Contract, are listed below:

Name and Address of Agents	Amount and Currency	Purpose of Commission or Gratuity
____________	____________	____________
____________	____________	____________

{If no payments are made or promised, add the following statement: "No commissions or gratuities have been or are to be paid by us to agents or any third partyrelating to this Proposal and Contract execution."}

We understand you are not bound to accept any Proposal you receive.

We remain,

Yours sincerely,

Authorized Signature {In full and initials}: ______________________________
Name and Title of Signatory: ______________________________

In the capacity of: ____

Address: ____

E-mail: _________________________

FORM FIN-2SUMMARY OF COSTS

Item	{Consultant must state the proposed Costs in accordance with Clause **14.3 of the Data Sheet**; delete columns which are not used} Cost (Afghani)
Cost of the Financial Proposal	
Including:	
(1) **Remuneration**	
(2) **Re-imbursables**	
Total Cost of the Financial Proposal: {Should match the amount in Form FIN-1}	
Indirect Local Tax Estimates – to be discussed and finalized at the negotiations if the Contract is awarded	
(i) {insert type of tax. e.g., VAT or sales tax}	
(ii) {e.g., income tax on non-resident experts}	
(iii) {insert type of tax}	
Total Estimate for Indirect Local Tax:	

Footnote: Payments will be made in the currency(ies) expressed above (Reference to ITC 16.3).

FORM FIN-3 BREAKDOWN OF REMUNERATION

When used for Lump-Sum contract assignment, information to be provided in this Form shall only be used to demonstrate the basis for the calculation of the Contract's ceiling amount; to calculate applicable taxes at contract negotiations; and, if needed, to establish payments to the Consultant for possible additional services requested by the client. This Form shall not be used as a basis for payments.

No.	**Name**	**Position (as in TECH-6)**	**Person-month Remuneration Rate**	**Time Input in Person/Month** (from TECH-6)	{*Currency as in FIN-2*}
	Key Experts				
K-1			[*Home*]		
			[*Field*]		
K-2					
	Non-Key Experts				
N-1			[*Home*]		
N-2			[*Field*]		
				Total Costs	

Consultant's Representations Regarding Costs and Charges
(Model Form I)

(Expressed in {insert name of currency*})

Personnel		1	2	3	4	5	6	7	8
Name	Position	Basic Remuneration Rate per Working Month/Day/Year	Social Charges[1]	Overhead[1]	Subtotal	Profit[2]	Away from Home Office Allowance	Proposed Fixed Rate per Working Month/Day/Hour	Proposed Fixed Rate per Working Month/Day/Hour[1]
Home Office									
Client's Country									

{* If more than one currency is used, use additional table(s), one for each currency}

1. Expressed as percentage of 1
2. Expressed as percentage of 4

FORM FIN-4 BREAKDOWN OF REIMBURSABLE EXPENSES

When used for Lump-Sum contract assignment, information to be provided in this Form shall only be used to demonstrate the basis for calculation of the Contract ceiling amount, to calculate applicable taxes at contract negotiations and, if needed, to establish payments to the Consultant for possible additional services requested by the clint. This form shall not be used as a basis for payments.

N°	**Type of Reimbursable Expenses**	**Unit**	**Unit Cost**	**Quantity**	{Currency as in FIN-2}
___	{e.g., Per diem allowances**}	{Day}		___	
___	{e.g., International flights}	{Ticket}		___	
___	{e.g., In/out airport transportation}	{Trip}			
	{e.g., Communication costs between Insert place and Insert place}				___
	{ e.g., reproduction of reports}				___
	{e.g., Office rent}				___
	....				___
	{Training of the client's personnel – if required in TOR}				___
				Total Costs	

Legend*:*

"Per diem allowance" is paid for each night the expert is required by the Contract to be away from his/her usual place of residence. Client can set up a ceiling.

Section 5. Terms of Reference

1. Background

The Microfinance Investment Support Facility for Afghanistan (MISFA) was set up in 2003 at the invitation of the Afghan government — to get donor coordination right from the start and avoid the counter-productive efforts that have emerged from conflicting donor objectives in other post-conflict situations. It was established as a vehicle through which the Afghan Government and international donors could channel technical assistance and funding to build Afghanistan's microfinance sector. MISFA was the first facility of its kind, pooling diverse donor funding mechanisms and converting them into streamlined, flexible support to microfinance institutions in Afghanistan, tailored to local priorities and accompanied by technical assistance and strong performance monitoring. MISFA has currently 5 Microfinance institutions. Key indicators can be found at http://misfa.org.af/site_files/14249486491.pdf

MISFA is also implementing Targeting Ultra Poor (TUP) programs through Consultant's. Two programs are already completed and third in progress. Seven other programs are expected to start in 2015.

This Terms of Reference are meant for MISFA to engage a consulting firm or an independent organization herein after referred as the, "Consultant", following any suitable donor of MISFA procurement guidelines to deliver the expected outputs as outlined in Sections 3 below, and achieve the purpose and objectives. The GIS web-based MISFA-MIS will be developed under this assignment as an essential tool for reporting to achieve comparative, quality, timely and efficient monitoring and implementation reporting of the partners in an automated form.

2. Objectives of the Assignment (Summary)

The overall long term objective of the consultancy is to establish reliable and sustainable online tools and MIS capacity within the Microfinance Investment Support Facility for Afghanistan (MISFA) for careful information feeding, survey, database and reporting tool that improves the information management efficiency of MISFA and its partners. This will help MISFA to properly manage, plan, design, implement and evaluate the partners in the Microfinance sector in the future. This will be achieved through the MISFA-MIS by a GIS-web-enabled information system, data storage, management and comparative reporting process.

Therefore, the immediate objective now is to assess the current existing internal procedures and design, develop, establish and operationalize a comprehensive framework as an initial step towards the long term objective. The Consultant is therefore expected to keep the long term objective in his plans during the system requirement, design and implementation of the assignment.

At operational level, the specific objectives of the assignment are development and integration MIS for below five modules:

1. Targeting Ultra Poor (TUP)
2. Microfinance / Monthly Performance Report (MPR)
3. Microfinance / Performance Standard Scoring Tool (PSST)
4. Progress out Poverty Index (PPI)
5. Knowledge Management & Learning platform (KM&L)
6. Partner Deliverables Tracking (PDT)

7. Action Plan Implementation Tracking (APIT)
8. Geographic Information System (GIS)

3. Objectives of the Assignment (Detail) / Scope of Work

MISFA-MIS will have below five modules. Requirement of each module is mentioned in detail under each module, but not limited to:

3.1 Targeting Ultra Poor (TUP)

The TUP Program provides beneficiaries with a package of inputs over a two year period, including the transfer of productive assets, training, subsistence support, and basic health care. The aim of the program is to graduate ultra-poor households out of safety net programs to income earning activities as well as linking them with microfinance programs. As a result, income within the household groups is expected to increase in addition to overall wellbeing such as health. The impact of this investment has been estimated with a range of scenarios.

TUP Expectations

1. TUP staff should be able to generate dynamic online data entry forms, templates, surveys, as per their finalized questionnaire format. Questionnaire is composed of different modules and each module has several indicators. Each indicator has "Unit" and "Target". Questionnaire of each donor is different from one another.
2. TUP staff should be able to assign users with pre-defined authentication for data entry purposes.
3. The authorized data entry users of assigned partners / MISFA staff should be able enter the collected data into MISFA-MIS-TUP.
4. TUP staff should be able to generate comparative data in different analyzed format from different surveys of same beneficiaries as below:
   - 4.0 Current survey data/value with Target value.
   - 4.1 Current survey data/value with Baseline Survey value.
   - 4.2 Baseline Survey with Target value.
5. TUP staff should be able to generate progress and financial reports with different criteria (indicators, duration, beneficiary type and etc.).
6. TUP staff should be able to upload pictures, narratives in word format, PDF files etc.

3.2 Microfinance / Monthly Performance Report (MPR)

MPR is collected from current five partners of MISFA, and it monitors the performance partners on monthly basis. MPRs of all partners carried out by sub-section of Monitoring and Supervision

Department (MSD). Assessments of partners are done on monthly basis in MS Excel sheets. MPR is composed of several standard templates in MS Excel sheet. List is given below:

1. Income statement
2. Balance sheet
3. Portfolio summary
4. Branch data sheet
5. Provincial
6. Performance Tracking
7. Narrative report

Each excel sheet is composed of different indicators under sub-section. Most of the values are entered by partners/ users and reported to MISFA on monthly basis, while some cells (ratios) are auto-calculated with predefined functions and formulae. These excel sheets will be provided to Consultant for further detailed review during requirement phase of MISFA-MIS.

MPR Expectations

1. The authorised users of all partners should be able export their excel sheet data into MIS automatically.
2. MISFA-MIS-MPR staff should be able to evaluate and generate the individual and consolidated reports of all partners.
3. MISFA-MIS-MPR staff should be able to generate customized periodic comparative report of each partner separately, as well as cumulative performance of all partners.
4. The reports are uploaded/submitted in Afghani currency, the system should be able to translate that into USD using an exchange rate which will is entered by MISFA.
5. The reporting system should enable timely outputs as early as by 15th day of every month for previous month's MPRs.
6. The reports generated by MISFA should be exportable in Excel, pdf, word formats.

3.3 Performance Standard Scoring Tools (PSST) / Assessment Report

MISFA has developed 22 performance standards against which each partner is assessed annually, the assessment tool comprises of:

1. Assessment Questions (240 Questions with answer options and scoring).
2. Risk Level Vs Risk Score.
3. Standard wise score summary (Result of "Assessment Questions" sheet)
4. Additional Steps.

PSST Expectations

1. The database should have current 240 questions with answer option and scoring criteria. Team lead MSD should be able to add/remove some questions. Authorized users should be able to select an answer option for each question. Based on selected answers, data base should provide scoring on single click. The questions sheet has:

1.0 Q No Cum
1.1 Category Name
1.2 Q No (Standard)
1.3 Standard Name
1.4 Principle
1.5 Options
1.6 Risk Level
1.7 Risk Score
1.8 Answer
1.9 Risk Level
1.10 Risk Score
1.11 Docs Reviewed & Review Tools
1.12 Comments & Gaps

2. MISFA-MIS-Administrator should be able to assign users with pre-defined authentication for data entry purposes.
3. The authorised data entry users of assigned MISFA staff should be able enter the collected data into MISFA-MIS-PSST module.
4. PSST staff should be able to generate comparative data in different analysed format from partners.
5. PSST staff should be able to generate analysed summary score with different criteria Standards, Date, duration, etc.
6. Authorized users should be able to upload PDF, word, excel and etc. files.

3.4 Progress out Poverty Index (PPI)

MISFA conducts PPI survey on annual basis (frequency may change) to evaluate and analyse the overall change in poverty of microfinance clients and probably TUP beneficiaries. About 2,000 sample size of baseline survey was conducted from MF beneficiary in 2014.So far the survey tools are finalized by MISFA. Survey is conducted by partners, while data entry analysis and reporting is performed done by MISFA. Currently the data entry and analysis of survey is conducted in MS Excel sheets. It is time consuming to generate different periodic comparative reports manually. The questionnaire is written in both English and Dari language. The Consultant should propose suggestions for solutions of bi-language MIS options.

PPI Expectations

1. PPI staff should be able to generate dynamic online data entry forms, templates, surveys, as per their finalized questionnaire format.
2. PPI staff should be able to assign users with pre-defined authentication for data entry and/or report generation purposes.

3. The authorised data entry users of assigned partners or MISFA staff should be able enter the collected data into MISFA-MIS-PPI.
4. PPI staff should be able to generate customized comparative data in different analysed format from different surveys of same beneficiary.

3.5 Knowledge Management and Learning (KM&L)

MISFA has recently established a KM&L Department and seeks to promote data and information sharing within MISFA, with and between partners and MFIs and with the wider microfinance community ('the public'). It would therefore have 3 user groups:

1. Internal MISFA
2. MISFA partners
3. Microfinance sector-public

K&ML Expectations

1. Attractive and user friendly front-end and interfaces for public1, non-expert users
2. Based on principle of all information being 'open' unless decision is actively taken to ' close' information e.g. confidential information internal to MISFA
3. Organised around targeted users
4. Integrated and linked with gateways to other sites and systems i.e. MISFA website; MISFA MIS; AMA microview
5. Ability to collect and analyze KM&L system analytics, metrics and tracking functionality of users and usage
6. Ability to create individual user profiles
7. Ability to search (key words) and navigate
8. Ability to post and download documents
9. Categorised (functional and thematic) digital information library/repository of products, documents and tools
10. Interactive knowledge sharing, collaboration and discussion groups space (where multiple users can connect and work together)
11. Facility for online learning
12. Webinar facility (open source)
13. Microfinance Jobs portal
14. Comments and message board
15. Blog space

[1] 'Public' is defined as users from the wider microfinance community such as non-MISFA partners, donors, institutes, microfinance professionals from other countries

Knowledge management and learning survey functionality will be available as part of the functionality of PPI (paragraph 3.4.1. above).

3.6 Partner Deliverables Tracking (PDT)

MISFA keep the record of Deliverables of Partners in excel sheet currently, by using following fields:

Main columns (Attributes)

1. Partner
2. Agreement Number
3. Signed on
4. Expires on
5. Tracking Sheet Last Updated
6. Loan fund
7. Operating Grant

Sub-Columns (Attributes)

8. Sr. No.
9. Ref. Section (e.g. Proposal)
10. Ref. Sub-Section
11. Ref. Page #
12. Deliverable (Activity/Product/Report)
13. Target
14. Target date
15. Applicability (Yes/No/NA)
16. Progress (%)
17. Compliance Status
18. Remarks

PDT Expectations

1. MISFA-MIS should be able to track the above mentioned fields of PDT excel sheet.
2. PDT module should prompt the responsible staff (MISFA / relevant partner) to take necessary actions, considering to ‘Status’, ‘End Date’ of each of pending deliverable. Business rules will be discussed and agreed during Software Requirement Specification (SRS) phase of the contract.
3. PDT module should be able to generate customized report by Status, End-Date and etc.
4. This module must have flexibility to accept the change by adding/ removing any required/ un-required fields.

5. Consulting firm should propose additional columns (Attributes) / features to facilitate for smooth process of PDT.

3.7 Action Plan Implementation Tracking (APIT)

MISFA keep the record of Actions Plan of Partners in excel sheet on annual basis, by using following fields:

Main Columns (Attributes)

1. Partner
2. Report date
3. Updated by
4. Update Date

Sub-Columns (Attributes)

5. Sr. No
6. Review Area
7. Gap
8. Recommendation
9. Action Agreed by OXUS
10. Updated Timeline
11. Responsibility
12. Status update

APIT Expectations

1. MISFA-MIS should be able to track the above mentioned fields of PDT excel sheet.
2. Consulting firm should propose additional columns (Attributes) / features to facilitate for smooth process of PDT via MISFA-MIS.
3. PDT module should prompt the responsible staff (MISFA and relevant partner) to take necessary actions, considering the 'Status', 'End Date' etc. of each pending Action. Business rules will be discussed and agreed during Software Requirement Specification (SRS) phase of the contract.
4. PDT module should be able to generate customized report by Status, Date etc.
5. This module must have flexibility to accept the change by adding/ removing any required/ un-required fields.

3.8 Geographic Information System (GIS) Expectations

The online GIS application will be used to plot all the data entered into MISFA-MIS system over a GIS map. The online GIS application should have below features:

1. Generate module wise gradient maps filtered by date, indicator, partner, budget, status etc.

2. Generation provincial and districts wise maps for modules & indicator data.
3. Plot all modules of information over map using GPS coordinates.
4. Plot data over Google Maps, using Google APIs and Google imagery.

4. Technical and Administrative Features of MISFA-MIS

3.9 Users

There will be three types of users; type of users may differ considering the nature of each module. Each user will have login credentials to enter into the system.

3.9.1 Administrator

The administrator will be having the following roles:

1. User creation
2. Reset passwords
3. Inquiring the system
4. Generating reports
5. Granting access over reports and client information to the users
6. Viewing and generating log reports
7. Defining roles for any user i.e. whether he should upload the data, or use the system for inquiry or both.

3.9.2 Partner User

This user will belong to a MISFA's partner. There are two roles under this category:

1. Data upload

   The user will be able to upload data into the system.

2. Data inquiry

   This user will be able to inquiry the system to check the client's current loan details.

3.9.3 Central User

This user will be created for audit purpose and will not belong to any MISFA's partner. His role should be defined by the administrator.

3.10 Documentation

Source code and user manual should be provided along with the software. The source code should be well commented. All modules and their functionalities, outputs and parameters should be well documented in the form of a technical document, so that it could be used by MISFA for future development or any subsequent contractor taking over the software development task.

3.11 Functional Requirements

There should be format rules and restrictions on the data, so that if any mandatory field is missing or is not in proper format, the data should not be uploaded at all and error line should be highlighted.

The upload process should be fully functional and all testing scenarios should be considered i.e. wrong data, wrong file format, missing any mandatory field, error or any hardware failure etc. during data upload.

3.12 Principles of information sharing

The principle of being an organization whose culture seeks to share knowledge and learning, both internally and externally, should be enshrined within the system, so that all information is accessible, unless specific decisions have been made to keep certain information 'private' due to confidentiality, for example.

3.13 Reports

The system should be able to generate and export the custom reports to excel. The choice of selection criteria may differ from module to module. Selection criteria for each module will be discussed and finalized during the requirement phase.

3.14 Performance Requirements

The system should be designed in such a way that it could be accessible through a minimum bandwidth of 128 kbps.

3.15 Security Requirements

3.15.1 Logs

To keep track of system usage, logs should be created every single time system is accessed and used. These logs include:

1. Login logs
2. Data modification logs
3. Inquiry logs
4. Data upload logs

The logs should include information about user, IP addresses, time and type of activity.

3.15.2 Security

Security measures should be taken so that any third party could not access the data during upload. Options for providing maximum security should be provided such as secure VPN for data upload etc.

3.16 Software Quality Attributes

1. The system should be user friendly and any excessive-scrolling should be avoided to view data.
2. All error and confirmation messages should be displayed where required.
3. Should be aligned with the keyboard as much as possible i.e. enter key should work for confirmation etc.
4. Textboxes validation should be done, i.e. any wrong input should not be accepted. For example in a text box for telephone number only numbers should be the acceptable input.
5. The system should be fully functional and free of bugs.
6. The system should be flexible enough to endure future changes.
7. Maintenance is required in case of bugs or future modifications.
8. The database should be designed keeping in mind consistency, data integrity and performance.
9. Kindly mention the tools (programming language) that you will be using to develop the frontend and backend.

5. Overall Objectives

In addition to that from institutional objectives point of view the MISFA-MIS system will be an asset for MISFA, contributing to the strengthening of institutional capacity by creating the GIS-Web-enabled information management and reporting system:

1. Time saving: the MISFA staff will be able to save a lot of time by generating online automatic reports.
2. Data accessibility: all the data will be stored ina centralized repository, and can be accessed by any authorized user (stakeholders) at any time and from anywhere one has internet connectivity and a computer.
3. Data accuracy: due to system validation the project-sensitive data will not be in error-prone excel spread-sheet, or damages due to computer troubleshooting.
4. System availability: the project leaders and concerned stakeholders can update project data at any time resulting in more efficient data input and utilization.
5. Data security: the data will be dealt with IT standards with recurrent backups to ensure data integrity and availability.
6. Data in real-time: the nominated MISFA staff working on the system will be able to access real-time reports and/or with alerts enabled against delayed report inputs.
7. Report customization: the system will also allow all concerned individuals from MISFA management, the Donors and any other stakeholders to generate customized information for any specific analysis as required by accessing the custom reports (Performance Reports) online.

8. Maps / visual display of outputs: GIS module of MISFA-MIS will display the outputs of MISFA in maps (visual) format to all stakeholders.
9. Quality data: insightful charts and graphs, real-time alerts for critical data points will be integral part of the system which enhances the reporting quality.
10. Management tool: the system is a handy tool for project management to monitor the comparative performance periodically, including financial disbursements of partners.
11. Impact assessment tool: the MISFA-MIS will be an asset for decisions maker for future. It helps in using the information for planning as well.
12. Choosing the best Data Security Methodology for keeping Data secure during the transition from Inbound to outbound and vies versa.
13. Reliable Data Accessibility in terms of minimum Bandwidth requirement and meeting the compatibility and accessibility standards of the current technologies.
14. Principle of information sharing and learning will be enshrined as 'open' unless specific information is identified as being 'closed' for purposes of confidentiality.

6. Outline of the Tasks and Responsibilities

1. The Consultant will provide the client an update on the plan of action for the implementation of the assignment, staring from existing system evaluation to system design and online report generation.
2. The Consultant will establish and maintain coordination with the MISFA teams and the key technical staff from both at the MISFA management and Partner levels in the exchange of information, to work jointly in the design of the MISFA-MIS.
3. The Consultant then will develop and introduce web-forms for field information surveys, to be filled online by the project concerned staff under overall supervision of the technical unit. The filled data will comprise MISFA information, values, disbursement and etc. The system will enable real time information updates and generate reports every month and quarter.
4. Separate web-forms for each partner will be introduced for complete data updates to be aggregated in the MPR formats.
5. The Consultant will introduce web-enabled customized reports by providing suitable options for the system users. The customized reports are normally brief and specific, but require self-generated charts and tables build in the system. The Consultant will ensure that this important facility is built in and available to the Client.

7. System Accessories

1. The web reporting system will have filters that can control the errors in budgets, numbers, percentages, etc.
2. The system will enable triggered alerts for critical reported information or when the data entry task is delayed.
3. The Consultant will enable periodic data backups in the system.
4. It should be possible to access the system from the official website of MISFA i.e. www.misfa.org.af

8. Operation, Hosting and Maintenance

1. The Consultant will be responsible for debugging and commissioning of the system at the completion of the design stage.
2. The Consultant will be responsible for hosting of the system at the completion of the design stage for one year. Consultant is required to provide work plan for long-term hosting.
3. The Consultant will carry out the system maintenance and fix any troubleshooting that occurs during the period of the contract up to one year after the completion.
4. The consultant is required to provide work plan and quotation for providing technical support, maintenance, customization and up gradation of the software for long term after mandatory one year maintenance period. The long term contract may or may not be awarded at the time of award of this contract.
5. The Consultant will provide the Client a package of guidelines for proper system operation and safeguard at the initial stage of the assignment, and similarly other package of guidelines will be conveyed to the Client for the post System development usage.

9. Staffing and Training

The Consultant will make available qualified professionals and specialists for the implementation of this assignment, and train the project staff at the management office on the operation of the system. The project focal staff will be trained on user control and system confidentiality measures.

10. Contract Duration

The duration of the contract will include the development of the system and one year maintenance. The Consultant will propose development duration and prepare a detailed work plan dividing the assignment into activities by modules and phases.

11. Duty Station

The Consultant will perform the tasks from Kabul and his regional offices (if applicable), with as and when needed base training in MISFA.

12. Reporting Requirement of Assignment

The Consultant is responsible to provide Progress Report on fortnightly basis on status of activities and deliverables. The Consultant should propose any solution to the delayed activities. The Consultant should report on-time, subject to any major issue faced during the implementation of assignment.

Before finalizing the solution, the consultant should give a presentation on system to persons nominated by MISFA management. At the end of the assignment, the Consultant will submit the EOA (End of Assignment) together with the other specific reports and manuals. The Consultant will hand over the product to the Client in DVDs with electronic instruction guides.

13. Data, Services & Facilities to be Provided by the Client

The MISFA shall provide the following to the Consultant:

1. Facilitate access to email addresses of project staff stationed in the regions and central offices.
2. Facilitate access to and interviews with any authority or personnel as well as facilitation of security logistics for any field movements to the regional offices as required.
3. Nominate the staff operating the system at the management and regional levels.
4. Nominate the project counterparts to be trained by the Consultant.
5. All the project needful documents in demand by the Consultant that can facilitate and help in producing timely and best quality reports.
6. All the reporting templates, spreadsheets, forms etc. that are currently in use for the reporting process by client will be provided to the Consultant in electronic versions.
7. All other relevant data available, including maps as required.

Qualifications Required for the Key Personnel

#	Proposed Person for Position (Maximum Points)	General Qualifications [40%]	Adequacy for assignment [60%]	Total 100%
1	Project Manager Should devote 100% time to the project. This position is responsible for the overall quality and quantity of the project.	Minimum Master Degree in Computer Science / Information management or similar field. PMP certified will be preferred	Minimum 5 years of work experience managing large MIS / Database projects	
2	System Analyst Should devote 100% time to the project. This position is responsible for the requirement and design of MISFA-MIS	Minimum Bachelor's Degree in Computer Science / Information management / BA or similar field.	Minimum 5 years of work experience in analyzing large and medium MIS / Database projects	
3	System Design Specialist Should devote 100% time to the project. This position is responsible for the design of MISFA-MIS	Minimum Bachelor's Degree in Computer Science / Information management or similar field.	Minimum 5 years of work experience in designing large and medium MIS / Database projects	
4	Software Developer Should devote 100% time to the project. This position is responsible for the programming and coding of MISFA-MIS	Minimum Bachelor's Degree in Computer Science / Information management or similar field.	Minimum 5 years of work experience in programming and coding of large and medium MIS / Database projects	
5	GIS Specialist / Programmer Should devote 100% time to the project. This position is responsible for the GIS related activities	Minimum Bachelor's Degree in Computer Science / Information management or GIS.	Minimum 2 years of work experience in GIS	

I. Appendices

Appendix A – Terms of Reference

[This Appendix shall include the final Terms of Reference (TORs) worked out by the client and the Consultant during the negotiations; dates for completion of various tasks; location of performance for different tasks; detailed reporting requirements and list of deliverables against which the payments to the Consultant will be made; Client's input, including counterpart personnel assigned by the client to work on the Consultant's team; specific tasks or actions that require prior approval by the client.

Insert the text based on the Section 7 (Terms of Reference) of the ITC in the RFP and modified based on the Forms TECH-1 through TECH-5 of the Consultant's Proposal. Highlight the changes to Section 7 of the RFP]

……………………………………………………………………………………………

Appendix B - Key Experts

[Insert a table based on Form TECH-6 of the Consultant's Technical Proposal and finalized at the Contract's negotiations. Attach the CVs (updated and signed by the respective Key Experts) demonstrating the qualifications of Key Experts.]

……………………………………………………………………………………………………

Appendix C – Breakdown of Contract Price

[Insert the table with the unit rates to arrive at the breakdown of the Total Contract Price. The table shall be based on [Form FIN-3 and FIN-4] of the Consultant's Proposal and reflect any changes agreed at the Contract negotiations, if any. The footnote shall list such changes made to [Form FIN-3 and FIN-4] at the negotiations or state that none has been made.]