**TECH Forms**

Form TECH-1: Technical Proposal Submission Form

[Location, Date]

To: [Name and address of Client]

To whom it may concern:

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 Proposal. We are hereby submitting our Proposal, which includes this Technical Proposal, and a Financial.

We are submitting our Proposal in association with: [Insert a list with full name and address of each associated Consultant if submitting as an association]

We hereby declare that all the information and statements made in this Proposal are true and accept that any misinterpretation contained in it may lead to our disqualification.

If negotiations are held during the period of validity of the Proposal, i.e., before the date indicated in Paragraph Reference 2.6 of the RFP, we undertake to negotiate on the basis of the proposed staff, methodology and approach. Our Proposal is binding upon us and subject to the modifications resulting from Contract negotiations.

We undertake, if our Proposal is accepted, to initiate the consulting services related to the assignment.

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:

Name of Firm:

Address:

Form TECH-2: Firm’s Organization and Experience

A - Organization

[Provide here a brief (two pages) description of the background and organization of your firm/entity and each associate for this assignment.]

B - Experience

[Using the format below, provide information on each assignment for which your firm, and each associate for this assignment, was legally contracted either individually as a corporate entity or as one of the major companies within an association, for carrying out consulting services similar to the ones requested under this assignment. Use not more than 20 pages.]

|  |  |
| --- | --- |
| Assignment name: | Approx. value of the contract (in current US$ or Euro): |
| Country:  Location within country: | Duration of assignment (months): |
| Name of Client: | Total No of staff-months of the assignment: |
| Address: | Approx. value of the services provided by your firm under the contract (in current US$ or Euro): |
| Start date (month/year):  Completion date (month/year): | No of professional staff-months provided by associated Consultants: |
| Name of associated Consultants, if any: | Name of senior professional staff of your firm involved and functions performed (indicate most significant profiles such as Project Director/ Coordinator, Team Leader): |
| Narrative description of Project: | |
| Description of actual services provided by your staff within the assignment: | |

Firm’s Name:

Form TECH-3: Comments and Suggestions on the Terms of Reference and on Counterpart Staff and Facilities to be Provided by the Client

On the Terms of Reference

[Present and justify here any modifications or improvement to the Terms of Reference you are proposing to improve performance in carrying out the assignment (such as deleting some activity you consider unnecessary, or adding another, or proposing a different phasing of the activities). Such suggestions should be concise and to the point, and incorporated in your Proposal.]

Form TECH-4: Description of Approach, Methodology and Work Plan for Performing the Assignment

[Technical approach, methodology and work plan are key components of the Technical Proposal. You are suggested to present your Technical Proposal (Not more than 40 pages, inclusive of charts and diagrams) divided into the following three chapters:

1. Technical Approach and Methodology,
2. Work Plan, and
3. Organization and Staffing,

a) Technical Approach and Methodology. In this chapter you should explain your understanding of the objectives of the assignment, approach to the services, methodology for carrying out the activities and obtaining the expected output, and the degree of detail of such output. You should highlight the problems being addressed and their importance, and explain the technical approach you would adopt to address them. You should also explain the methodologies you propose to adopt and highlight the compatibility of those methodologies with the proposed approach.

b) Work Plan. In this chapter you should propose the main activities of the assignment, their content and duration, phasing and interrelations, milestones (including interim approvals by the Client), and delivery dates of the reports. The proposed work plan should be consistent with the technical approach and methodology, showing understanding of the Terms of Reference and ability to translate them into a feasible working plan. A list of the final documents, including reports, drawings, and tables to be delivered as final output, should be included here. The work plan should be consistent with the Work Schedule of Form TECH-8.

c) Organization and Staffing. In this chapter you should propose the structure and composition of your team. You should list the main disciplines of the assignment, the key expert responsible, and proposed technical and support staff.]

Form TECH-5: Team Composition and Task Assignments

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Professional Staff | | | | |
| Name of Staff | Firm | Area of Expertise | Position Assigned | Task Assigned |
|  |  |  |  |  |
|  |  |  |  |  |
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Form TECH-6: Curriculum Vitae (CV) for Proposed Professional Staff

**1. Proposed Position** [only one candidate shall be nominated for each position]:

**2. Name of Firm** [Insert name of firm proposing the staff]:

**3. Name of Staff** [Insert full name]:

**4. Date of Birth**: **Nationality**:

**5. Education** [Indicate college/university and other specialized education of staff member, giving names of institutions, degrees obtained, and dates of obtainment]:

**6. Membership of Professional Associations**:

**7. Other Training** [Indicate significant training since degrees under 5 - Education were obtained]:

**8. Countries of Work Experience**: [List countries where staff has worked in the last ten years]:

**9. Languages** [For each language indicate proficiency: good, fair, or poor in speaking, reading, and writing]:

**10. Employment Record** [Starting with present position, list in reverse order every employment held by staff member since graduation, giving for each employment (see format here below): dates of employment, name of employing organization, positions held.]:

From [Year]: To [Year]:

Employer:

Positions held:

|  |  |
| --- | --- |
| **11. Detailed Tasks Assigned**  [List all tasks to be performed under this assignment] | **12. Work Undertaken that Best Illustrates Capability to Handle the Tasks Assigned**  [Among the assignments in which the staff has been involved, indicate the following information for those assignments that best illustrate staff capability to handle the tasks listed under point 11.]  Name of assignment or project:  Year:  Location:  Client:  Main project features:  Positions held:  Activities performed: |

**13. Certification:**

I, the undersigned, certify that to the best of my knowledge and belief, this CV correctly describes myself, my qualifications, and my experience. I understand that any wilful misstatement described herein may lead to my disqualification or dismissal, if engaged.

Date:

[Signature of staff member or authorized representative of the staff] Day/Month/Year

Full name of authorized representative:

Form TECH-7: Staffing Schedule1

|  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| N° | **Name of Staff** |  | Staff input (in the form of a bar chart)2 | | | | | | | | Total staff-week input |
| **1** | | **2** | **3** | **4** |  | **5** | **6** | **7** | **Total** |
| 1 |  |  | |  |  |  | |  |  |  |  |
| 2 |  |  | |  |  |  | |  |  |  |  |
| 3 |  |  | |  |  |  | |  |  |  |  |
| n |  |  | |  |  |  | |  |  |  |  |
| **Grand Total** | | | | | | | | | | |  |

1 For Professional Staff the input should be indicated individually; for Support Staff it should be indicated by category (e.g.: draftsmen, clerical staff, etc.).

2 Weeks are counted from the start of the assignment. For each staff indicate separately staff input.

Form TECH-8 Work Schedule

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **N°** | **Activity**1 | **Weeks**2 | | | | | | |
| **1** | **2** | **3** | **4** | **5** | **6** | **7** |
| 1 |  |  |  |  |  |  |  |  |
| 2 |  |  |  |  |  |  |  |  |
| 3 |  |  |  |  |  |  |  |  |
| 4 |  |  |  |  |  |  |  |  |
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|  |  |  |  |  |  |  |  |  |
| n |  |  |  |  |  |  |  |  |

1 Indicate all main activities of the assignment, including delivery of reports (e.g.: inception, interim, and final reports), and other benchmarks such as Client approvals. For phased assignments indicate activities, delivery of reports, and benchmarks separately for each phase.

2 Duration of activities shall be indicated in the form of a bar chart.

**Annex 4**

**Company Profile Form**

Please respond to all questions.

Company details - vendor’s name

|  |
| --- |
| Name: |

General Information

|  |  |  |
| --- | --- | --- |
| Primary contact for sales/client services |  | |
| Address |  | |
|  |  | |
|  | Postal Code: Country: | |
| Telephone: | | Fax: |
| E-mail: | | Web site: |
| Parent company, if any |  | |
| Subsidiaries, Associates, and/or Overseas Rep(s), if any |  | |
| Year established |  | |
| Registration Number |  | |
| Type of organization | Public enterprise ( )  Private company ( )  Organization sponsored (assisted by Government) ( )  Other (please specify): ….. ( ) | |
| Type of Business | Manufacturer ( )  Retailer ( )  Authorized Agent ( )  Consulting Company ( )  Other (please specify): ….. ( ) | |
| Summary of main business activities |  | |
| No. of employees  (by location) |  | |
| Staff turnover rate |  | |
| In-house working language (s) |  | |
| Bank Name:  Bank Address:  Account Holder:  Account Number:  IBAN:  SWIFT: |  | |

Prior experience with international organizations

|  |
| --- |
| List contracts with international organizations in the last three years  BRIEFLY list recent contracts that used relevant tools, technologies, and techniques:  Attach additional sheets if necessary. |
| 1 |
| 2 |
| 3 |

Environmental Policy

|  |
| --- |
| Does your company have a written statement of its environmental policy?  YES ( ) Please attach copy NO ( ) |

Contract disputes

|  |
| --- |
| List any disputes your company has been involved in over the last three years |
|  |
|  |

References

|  |
| --- |
| List suitable reference projects and contacts.  What options would there be for a site visit to a reference project and/or the vendor’s site? |
| 1 |
| 2 |
| 3 |

Partners

|  |
| --- |
| If this is a part bid, list relevant recent experience of working with partners.  Are there already formal or informal preferred partnership agreements in place? |
| 1 |
| 2 |
| 3 |

Conflict of interest

|  |
| --- |
| Are there any likely circumstances or contracts in place that may introduce a conflict of interest with the parties to this contract? If so, explain how this will be mitigated |
| 1 |
| 2 |

Certification

I, the undersigned, confirm that the information provided in this annex is correct. In the event of changes, details will be provided.

Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Title: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_