



# Guidelines for Preparing Responsive Proposals for Consultancy Services

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## Lumpsum Contracts

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PPRA

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Further information may be  
obtained on [www.ppra.go.tz](http://www.ppra.go.tz)

## **1.0 INTRODUCTION**

When Procuring Entities advertise Consultancy assignments they aim at obtaining maximum competition from the Firms. This can only be achieved if Firms submit commercially, technically and financially responsive proposals, so that eventually they are compared on their price.

Normally the evaluation of proposals for consultancy services is conducted as follows:

### **1.1 Technical Proposal**

- a) Examination of administrative and technical conformity of the proposals, in particular, compliance with the conditions laid down in the Request for Proposal (RFP), to the draft contract and the terms of reference
- b) Proposals that survive examination under para (a) above are then subjected to detailed technical evaluation and awarded scores in accordance with the criterion stipulated in the RFP document.

To avoid collusion, the evaluation of technical proposal is done by an evaluation committee of not less than five members who are required to work independently to evaluate the proposals by applying the criteria and sub-criteria stipulated in the RFP.

### **1.2 Financial Proposal**

The financial proposals of the firms evaluated under para (b) above, and scoring above the minimum score indicated in the RFP document will be opened and evaluated as follows

- a) The financial proposals are again examined as per para 1.1 (a) above.
- b) Examination of conformity to technical proposal in terms of the main inputs of the services to be provided and the amount of sub-consultancy which should not exceed 25%.
- c) Proposals that survive examination under para 1.2 (a) and (b) above are then subjected to detailed financial evaluation and awarded scores in accordance with the criterion stipulated in the RFP document
- d) Finally the technical and financial scores are combined in accordance with the proportion stipulated in the RFP document in the case of Quality and Cost Based Selection.

Detailed information on the evaluation of proposals are contained in the Guideline on the Evaluation of Technical and Financial Proposal and Preparation of Evaluation Report – Selection and Employment of Consultants of 2014 issued by the Public Procurement Authority (PPRA). The document is available in PPRA’s website.

Experience shows that few firms make it to the last stage of financial comparison. In most tenders more than 75% of firms are dropped in the first and the second stage of evaluation of technical proposal thus defeating the whole process of competition in tendering.

This guideline is intended to assist firms to prepare responsive proposals in conformity with the RFP documents.

In the tender process, we normally use the Standard Tender Documents (STD’s) which aims at:-

- a) increasing predictability and uniformity in the tender process,
- b) increasing efficiency of the tender process and reduce costs,
- c) reducing unresponsive proposals and thus increasing competition; and
- d) reducing preparation and review time.

For the Consultancy Services, it is recommended that Procuring Entities use the Standard Request for Proposals for Selection and Employment of Consultants ~~Lumpsum~~Lump sum Contracts ~~of~~of 2014 prepared by the PPRA.

It is unfortunate that many firms do not spend enough time to acquaint themselves with the content of the RFP documents. In particular the firms are required to understand all contents of the Information to Consultants (ITC) and the Proposal Data Sheet (PDS). These sections of the RFP document are important since they narrate to the firms on how to prepare their proposals; the list of documents to be submitted; how to seek clarifications during the preparation of the proposal; how, when and where to submit proposals and how the proposals will be evaluated.

Other important sections in the RFP document are the Standard Form of Contract (SFC) and Special Conditions of contract (SCC). These documents explain terms of execution of the contract. Some of the provisions in these documents have a cost implication to the firm, so it is important that the firm understands them and their effect in terms of costs.

Most Firms spend a lot of time on the Terms of Reference (ToR) Section since this is where they are able to see nature and magnitude of the services to be executed. However

in some occasions they fail to comprehend and appreciate the Clients' scoping, technical, reporting, and completion requirements, thus ending in submitting proposals that are non-responsive thus leading to rejection.

The RFP documents also provide sample forms for submitting various information in the proposal. The firms should ensure that these forms are properly filled, signed and stamped as appropriate.

In addition firms are required to read and understand the Public Procurement Act of 2011 and Public Procurement Regulations, 2013 (GN. No. 446)

## **2.0 CHECKLIST FOR SUBMISSION OF A RESPONSIVE PROPOSAL**

The following is a checklist aimed at assisting firms to prepare a responsive proposal in accordance with the Standard Request for Proposals for Selection and Employment of Consultants of 2014 for Lumpsum Contracts prepared by the PPRA. The document is available in PPRA Web Site.

- 2.1 Ensure that you have read and understood the contents of the RFP document and decide whether you are able to submit a responsive and a compliant proposal. This stage is important to enable you to save cost and money for preparing a proposal which you are absolutely aware that you can not meet its tendering and execution requirements. To tender or not to tender is one of the most important decisions that a firm has to make before starting the process of preparing a proposal.
- 2.2 Further to para. 2.1, list down all issues that you need to seek clarifications from the Client. Use the procedure shown in ITC Clause 9.
- 2.3 Ensure that your proposal is complete, properly filled, and properly signed in accordance with ITC Clause 26.
- 2.4 Make sure that you submit all the documents required in the proposal as per ITC Clause 17 and 19.
- 2.5 Check that all documents, interlineations, erasures or over writing are initialed as per ITC Clause 26.
- 2.6 Ensure that the proposal is submitted in the language of the proposal as per ITC Clause 14.

- 2.7 Make sure that you meet eligibility requirements as per ITC Clause 4 and 6 and Regulation 6 of the Public Procurement Regulations of 2013 (GN. No. 446) also available in PPRA's website.
- 2.8 Do not forget to attach business license and relevant registration documents.
- 2.9 Familiarize yourself with local conditions and take them into account in preparing the proposal and you attend site visit as required under ITC Clause 7.
- 2.10 Remember to attach documents to prove technical and financial ability to perform the contract.
- 2.11 Make sure that your financial proposal is in accordance with ITC Clause 19.
- 2.12 Ensure that you are in agreement with the provided period of validity of proposals as per ITC Clause 25.
- 2.13 Ensure that you are in agreement with the proposed completion period.
- 2.14 Ensure that you are aware of the criteria to be used for the evaluation of proposal as per ITC Clauses 36, 38, 39 and 40 and ensure compliance.
- 2.15 Make sure that your proposed payment schedule is in conformity with SFC and SCC Clause 54.
- 2.16 Ensure that you are aware with the contents of the SFC and SCC and their cost implication during the execution of the contract.
- 2.17 Ensure that your proposal is properly addressed and sealed in accordance with ITC Clause 27.
- 2.18 Ensure that your proposal is submitted at the right time and at the correct address as per ITC Clause 28.
- 2.19 Ensure that you are not engaged in corrupt, fraudulent, collusive and coercive practices in accordance with ITC Clause 3.
- 2.20 And finally ensure that you are aware of "Review of Procurement Decisions" as outlined in part G of ITC.

### **3.0 CONCLUSION**

It should be appreciated that the guideline is an attempt to bring to the attention of firms, important provisions in the RFP documents. It should not be taken as a replacement of the RFP documents. Firms still have the responsibility of reading carefully the RFP documents for each particular proposal and to ensure that their proposals comply with the provisions of such documents. However, it is our expectation that by reading this guideline, firms will find it easy to understand the relevant proposal documents for specific proposals in which they are participating.