

REQUEST FOR PROPOSAL

CONSULTANCY SERVICES REQUIRED FOR MARKETING CAMPAIGNS & OUTREACH ACTIVITIES

Empowering the Nation Together



First Women Bank Ltd.

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Section # 1



First Women Bank Limited

LETTER OF INVITATION

Ref No: FWBL-GEP/SZ/ 2016

August 22, 2016

Dear Mr. /Ms:

First Women Bank Ltd. (FWBL) invites proposals from eligible firms operating in Pakistan for consultancy services required for Marketing Campaigns & Outreach activities.

Selection of successful bidder will be carried out as per procedures prescribed in this Request for Proposals ("RFP"),

This RFP includes the following documents:

1. Invitation to the Consulting Firm
2. Scope of Work/Terms of Reference
3. Evaluation Criteria
4. Format of Technical Proposal
5. Format of Financial Proposal

Timeline for Submission of Questions by bidders on email to the undersigned for Clarifications on RFP: **August 29, 2016.**

Meeting with Bidders for Clarifications on Questions submitted via email: **August 30, 2016**

Proposals must be submitted to FWBL at the below mentioned address not later than **September 6, 2016.**

Sincerely,

Shaheen Zamir

Head of Marketing

First Women Bank Ltd. (FWBL)

Head Office, S.T.S.M. Foundation Building CL/10/20/2,

Beaumont Road ,Off Dr.Ziauddin Ahmed Road,

Civil Lines, Karachi.

Phone:+(92 21) 35657630

Email: shaheen.zamir@fwbl.com.pk

Section # 2

INVITATION TO THE CONSULTING FIRMS

Introduction

First Women Bank Ltd (FWBL) has received a grant from Aurat Foundation under its Gender Equity Program (GEP) supported by the USAID for a period of 10 months.

Under the project FWBL aims to re-launch itself as a vibrant financial institution to serve women of Pakistan by offering & developing need based financial products (both lending & Savings). The Bank fully recognizes the fact that it not only lending of money that can help women attain financial stability but it requires other ancillary supports such as: Training, awareness of their rights, understanding and outreach to market and enabling environment to fulfill their dual responsibilities.

Objectives

FWBL intends to achieve the following objectives:

1. **Increase its access to women clusters through need assessment and offering products and services needed by the target population on a continuous basis.**
 - To achieve this objective Consultant will help in developing 05 Research based products for home based workers for promoting small scale businesses while providing exposure to FWBL senior management team in analyzing research reports and developing products.
 - Expose FWBL senior team in leadership planning, and negotiation while junior management team in sales and customer service.

2. **Create public awareness about the project and its outcome and find long term partners to carry out these activities on a long term basis. Public engagements of the project initiation and closing to share outcomes.**
 - Announce the initiation of the projects to apprise the audience of its objectives, methodology and likely outcomes. Bank would like to organize a mega event for a wide range of audience including high officials from relevant ministries, international missions, social sector players, women organizations, potential clients and senior management of the Bank:

- Product awareness campaigns through product launch/ road shows, and devising seamless delivery methodology.
- Project closing ceremony to show case the results of the initiatives and success stories emerging out of this project.

SCOPE OF WORK /TERMS OF REFERENCE

Marketing, Awareness & Outreach Activities

The consulting firm will assist the bank with the following key marketing & outreach activities:

1. Grant Opening Ceremony *

FWBL will organize a grant launching ceremony in which all the stakeholders including core staff members of FWBL, entities of both public and private sectors, members of civil society, media and donors will be invited. Through this ceremony FWBL will inform stakeholders about the grant initiatives.

2. Grant closing ceremony *

FWBL will organize a grant closing ceremony to recognize the contributions of FWBL staff, home based workers and GEP partners. The ceremony will be attended by key stakeholders.

3. Financial products launching ceremony*

FWBL will organize a formal "Products Launch". This ceremony will be widely attended by banking staff, donors, and representatives from NGOs, CSOs, media and women customers who would have been facilitated by the new financial products.

Venue: Karachi or Islamabad

No. of Guests: 150 plus

***Main Tasks**

- Follow the theme and brandings (to be given)
- Help the bank in finalizing the list of participants
- Send out Invitations to all participants, including meeting chair(s), speakers, facilitators, etc;
- Follow up on invitations via telephone, email, fax;
- Identify and secure accommodation, manage boarding/lodging travel/transportation as per assigned budget.
- Send out information notes to all participants (arrival details, hotels, etc.);
- Protocol arrangements for VIPs, including arrival and departure at airport as needed
- Provide meet & greet as well as ushering services and also train FWBL staff.
- Establish strategic information desks and provide information to all participants
- Design and Develop Brand identity (including directional and livery signage street – pole flags etc.)

- Design and develop printing of promotional kits/bags, note books, pens and give-aways
 - In close cooperation with the program committee, finalize proceedings contents
 - Services of Master of Ceremony (Professional) to be hired.
 - Make arrangements for Musical Performances/Entertainment (opening & closing)
 - Arrange and manage participants' registration on site;
 - Design and make name tags/badges for all participants, speakers, Media, VIPs, etc.
 - Support the preparation, production and efficient distribution of materials
 - Organize and keep notes/minutes of all events.
 - Make arrangements for catering/tea/Dinners
 - Compile a speaker database and liaise with the speakers regarding their Presentations/papers and biographies
 - Arrange and ensure all Venues/ Meeting rooms are arranged and ready for the Meetings as required (as per specified meetings' schedule/program);
 - Ensure all required audiovisual equipment is available as required;
 - Arrange simultaneous interpretation for all sessions as required (English- Urdu if required);
 - In liaison with FWBL arrange publication of print media articles
 - High profile interviews – (Print & Electronic) during the launches
 - Preparation of Media releases, support with speech writing and editing
 - Media Monitoring
 - Oversee Video and photography during the events
 - Update and report the progress
 - The entire event will be organized in collaboration with FWBL committee. However, the overall responsibility of conducting and executing the agreed upon responsibilities will solely lie on the selected company.
 - Oversee any other event details as they may come up.
4. **Development of a Marketing Campaign:** The consulting firm will lead the development and rolling out of marketing campaigns for the newly developed **05** financial products.

5. **Financial Inclusion & Product Awareness through Road Shows: 03** Road shows*

This activity will be linked with the marketing campaign. Road shows will be designed and implemented according to the product usage. These road shows will play a vital role in marketing the product with live customers and to increase the selling and customer relations skills of the core staff.

Road shows will cover the segments of the market on smaller scale to increase financial inclusion. The road shows will be a significant part of the marketing campaign. These will be organized to attract general public- largely women (non-beneficiary group/ new clients) to promote & create awareness of the new financial products. FWBL expects to utilize GEP's "Pakistan Gender Coalition" (PGC) platform for marketing its products to GEP sub grantees so that NGOs and CSOs working on women's empowerment and development can access FWBL's services.

*The road shows will be organized in cities (where FWBL branches are located) and 17 GEP supported Universities

- The consulting firm has to develop and arrange an efficient transport system that works for the entire period. This includes collection sites and type of transport that should be made available at each specific collection sites, time of collection etc.

6. Success Stories*

The consulting firm will also develop (Print & Electronic) and share a minimum of **20 success** stories under this project. The 20 success stories will be from this proposed intervention. It will also include some stories (not all) of previous beneficiaries focusing on positive changes brought in their lives by using FWBL's new financial products. Such stories will showcase the constructive impact of continuous GEP engagements in their empowerment and the linkage with this new grant in grant cycle 10.

*To be presented at the Grant Closing ceremony

Clarification of RFP Documents

First Women Bank Ltd. ("FWBL") will follow a transparent selection criteria prescribed in the RFP as per the PPRA rules.

All the interested firms are invited to submit their proposals (the "Proposal(s)") containing a technical proposal (the "Technical Proposal") and a financial proposal (the "Financial Proposal") on the formats provided.

The selection of the successful bidder will be carried out based on the clarity, quality and alignment of the proposal with FWBL requirements as defined in the RFP. Any ambiguity in defining the deliverables, its implementation process and strategy may render the bidder disqualified from the entire procurement process or from award of score wherever applicable.

1. FWBL reserves the right to accept or reject any Proposal any time prior to the acceptance of the bid or proposal. FWBL shall, upon request, communicate to the firm, submitted the bid/proposal, the ground for its rejection but is not required to justify those grounds.
2. The sealed bids shall be submitted in two separate closed/sealed envelope- one marked as "**Technical bid**" and the other: **Financial bid**". Both these envelopes shall be kept in a separate envelope marked "REQUEST FOR PROPOSAL- **CONSULTANCY SERVICES REQUIRED FOR MARKETING CAMPAIGNS & OUTREACH ACTIVITIES** "

The proposals will be opened first in presence of all bidders and FWBL procurement Committee. The teams will be provided time slot of 30 Minutes for presenting their proposals before FWBL selection committee.

The evaluation team will study in detail to evaluate the technical proposals within 3-5 days once the technical proposal is evaluated. The financial bid of only those qualifying companies will be considered who have secured 50% and above marks.

3. Applicants are required to provide their credentials of the similar projects done earlier with some other organizations. The technical proposal will have 60% weightage for technical evaluation and 40% for the financial cost.
4. The Applicant should complete the project within the given timelines and if it fails to do so i.e. if it fails to deliver or complete the project/task within the given timelines or if it refuses to do so altogether at any stage, then FWBL will file a claim for damages caused to the bank due to failure of the contracting partner.
5. If at any stage FWBL finds that the firm is not delivering the quality services or observing any of the terms and conditions set out in the RFP, FWBL may terminate the contract. FWBL is the sole judge to evaluate the performance of the services subject to proper reasoning.
6. The minimum timeline for the completion of the project is **10 months**. This would ensure that the scope of work envisaged is on a similar context so that all the bids submitted should be for 10 months only.
7. After the selection of the successful bidder, FWBL may retain a certain portion not exceeding 20% of the total professional fee to be payable to the successful bidder for its provision of the Services to FWBL.

Technical Proposal:

Please submit evidences/attachments:

- Organization's legal name
- Firm incorporation certificate in Pakistan (governed by rules, laws and statutes of Government of Pakistan)
- Contact name with Designation
- Telephone number
- E-mail address
- Relevant Team and CVs (as per specimen)
- Undertaking to deploy the dedicated team with fulltime during the term of the project to FWBL.

- **Description of Methodology:** Not to exceed three (3) page narratives on the service provider’s methodology for executing the Proposed Approach/Objectives/Deliverables as described above.
- **Timeline:** A detailed timeline required to complete the project.
- **Capability Statement:** Not to exceed three (3) page narratives on the service provider’s capabilities to perform the scope of work indicating past experience. The service provider should include in an annex brief descriptions of previous projects implemented.
- **References:** A minimum of three (3) client references worked within the past two years on an activity that is similar to this Scope of Work. Include the contact information: company or organization, name, phone number and email.

Financial Proposal:

1. Detailed cost proposal for **implementing the Programs** that includes the following:
 - a. Proposed staff, rates, number of days needed to accomplish the work
 - b. Transportation and logistics costs item wise
 - c. Costs of events with related materials/supplies
2. The detailed cost proposal should be accompanied with a budget narrative, and supporting documentation that clearly describe how the budgeted amounts are calculated.
 - a. A brief narrative explanation and justification for each line item must be included in a separate section entitled “budget narrative” and include data to support actual costs and/or methodologies to support cost estimates. The budget narrative serves as justification for each cost included in a budget;
 - b. Please indicate the inclusion/exclusion of any applicable taxes such as VAT.

Please attach Cash Flows from Operational Activities for past 3 **years**

Disqualification Criteria:

FWBL may reject any Proposal of any applicant including but not limited to the following reasons:

- a. If any official of the firm has been in contact with any official of FWBL that has not been disclosed to FWBL prior to submission of the Proposals; or
- b. If the firm has been engaged in any *malafide* practice; or

- c. If any of the information, representation or document submitted by the firm in its Proposal or otherwise turns out to be materially incorrect or false; or
- d. If the Proposal submitted by any firm is not responsive to the RFP or does not fulfill the requirements of the RFP; or
- e. If the firm fails to provide any document or information required by RFP.

Opening of Proposals:

Initially only the Technical Proposals shall be opened on **September 7, 2016 at 12 pm**, in the presence of the bidders at FWBL Head Office. The bids that are not responsive or lack any of the required documents or do not cover any key information will be rejected at this stage.

Discussions:

If required, prior to evaluation of the Technical Proposal, FWBL may call upon any of the firm to discuss or to ask for clarification about anything contained in the Technical Proposal submitted by that Applicant as per the Regulation 3 B c (i) of Procurement of Consultancy Services Regulation 2010.

The discussions shall be conducted by the deputed personnel of FWBL to the Applicants.

The invited Applicant will, as a pre-requisite for attendance at such discussions, confirm availability of its professional staff relevant to this assignment, failing which FWBL may proceed to discuss with another invited Applicant.

Representatives discussing on behalf of the firm must have written authority to do so.

Minutes of such discussions shall be sent to all the firms.

Evaluation of Technical Proposals and Minimum Technical Threshold:

The Technical Proposals shall be evaluated by a dedicated committee on the basis of their responsiveness to this RFP in a fair and transparent manner giving each proposal a technical score in accordance with the Evaluation Criteria.

Opening of Financial Proposals of Applicants Meeting Minimum Technical Threshold:

The Financial Proposal of only those firms shall be considered, meet the Minimum Technical threshold as given above. The Financial Proposals shall be opened publicly by the dedicated Committee, with the total prices read aloud and recorded in the presence of the firm's representatives who choose to attend.

Date time and venue will be communicated accordingly to the firms through emails/ telephonically.

Successful Bidder:

Once the evaluation of both Technical and Financial Proposals is completed, the committee shall add the technical and financial score achieved by each firm and the firm scoring the highest aggregate score shall be declared as the successful bidder, subject, of course, to the approval by the competent authority of FWBL.

Evaluation Report:

After completing the evaluation, pursuant to Rule 35 of PPRA-2004 (and subsequent updates), FWBL shall announce the result of evaluation around 10-15 days prior to the award of Contract.

Project Plan:

Prior to the execution of the Contract, the successful firm will be required to submit Project Plan / Gantt chart that will illustrates the project schedule and timelines that shall be made part of the Contract.

Award of Contract:

The Contract shall be awarded to the Applicant securing the highest aggregate technical and financial score after the approval of competent authority of FWBL. The Contract shall be a time based contract as per Procurement of Consultancy Services Regulation 2010. The essential points of the Contract shall be mutually negotiated at the time of award.

Payment Criteria

The selected firm is expected to work in sequential phase and payment (in PKR) will be made to the firm in instalments as per completion of predefined modules/ phases which would be defined after mutual agreement between the awarded firm and the FWBL.

Availability of Professional Staff/Experts:

Having selected the firm on the basis of, among other things, an evaluation of proposed Professional staff, the FWBL expects to get the Contract executed by the Professional staff named in the Proposal. Before contract negotiations, the FWBL will require assurances that the Professional staff will be actually available. FWBL will not consider substitutions during contract negotiations unless both parties agree that undue delay in the selection process makes such substitution unavoidable or for reasons such as death or medical incapacity.

If this is not the case and if it is established that Professional staff were offered in the proposal without confirming their availability, the firm may be rejected. Any proposed substitute shall have equivalent or better qualifications and experience than the

original candidate and his name be submitted by the firm within the period of time specified in the letter of invitation to negotiate.

Taxes:

The firm shall be subject to all admissible duties and taxes unless exempted by the relevant tax authority for which the Applicant will have to show the necessary documents certifying the exemption.

EVALUATION CRITERIA

No.	Criteria	Weight	Score
1.	Experience of the firm related to assignment	30	
1.1	<p>Demonstrate experience in the provision of consultancy services for successful similar assignments.</p> <p>The firm will provide a proven track record of having organized events of international standards (references and contact persons will be required) and proven track record of having handled</p> <p>Provide copies of duly signed contracts with contact persons, letters of reference from at least three separate clients of Similar Assignments in the last (03) years;</p> <ul style="list-style-type: none"> • Above 3 assignments – 30 points • 3 assignments – 20 points • Below 3 assignment – 10 points 		
2.	Approach and Methodology	35	
2.1	<p>The firm shall give details on approach, strategies and methodology to ensure successful operationalization of events</p> <ul style="list-style-type: none"> • Appropriateness of Approach and Methodology – 20 points • Timeline/Work Plan – 15 points 		
3.	Qualifications and experience of key staff for the assignment	20	
3.1	<p>The lead consultant must have worked as a consultant in activities and assignments of similar nature for a minimum experience of 10 years’ in private or public organization.</p> <p>Above 10 years – 20 points 10 years – 15 points Below 10 years – 10 points</p>		

4.	Understanding of and conformity to the ToRs and additional suggestions and Presentation	15	
4.1	The consulting firm must demonstrate their understanding of and conformity to the terms of reference provided in the tender document. 05 points		
4.2	The consultant/firm will also provide additional suggestions and proposals on the Terms of Reference and the assignment. 05 points		
4.3.	Presentation: 05 points		
	Total	100	

TECHNICAL PROPOSAL - ANNEXURE

TECHNICAL PROPOSAL - ANNEXURE

KEY PERSONNEL DETAILS

No	Name	Designation	Nationality	Summary of qualifications and experience
1.				
2.				
3.				
4.				
5.				
6.				
7.				
8.				
9.				
10				

I certify that the above information is correct.

.....

(Title)

.....

(Signature) with Stamp

.....

(Date)

FINANCIAL PROPOSAL - ANNEXURE

FINANCIAL PROPOSAL - ANNEXURE

FINANCIAL QUOTATION SUBMISSION FORM (SPECIMEN)

_____ **[Date]**

First Women Bank Ltd.

Madam/Sir,

We, the undersigned, offer to provide the consulting services for (_____) *[Title of consulting services]* in accordance with your Request for Proposal dated (_____) *[Date]* and our Proposal. Our attached Financial Proposal is for the sum of (_____) *[Amount in words and figures]* inclusive of the taxes.

We remain,

Sincerely,

_____ **[Authorized Signature]**

_____ **[Name and Title of Signatory]:**

_____ **[Name of Firm]**

_____ **[Address]**

SUMMARY OF COSTS

S.No.	Description	Unit	Amount(s)
1.	Opening Ceremony	01	
2.	Development of a Marketing Campaign	05	
3.	Financial Product Launching Ceremony	01	
4.	Financial Inclusion and Product Awareness rough Road shows	03	
5.	Success Stories	20	
6.	Grant Closing Ceremony	01	

DETAILED BREAKDOWN OF PRICE PER ACTIVITY**(Amount in PKR)**

S.No.	Budget Line Items	Description	Unit Cost	No. of Units	Amount
1.	Opening Ceremony*				
2.	Development of a Marketing Campaign				
3.	Financial Product Launching Ceremony				
4.	Financial Inclusion and Product Awareness rough Road shows				
5.	Success Stories				
6.	Grant Closing Ceremony*				

Note:

Please give detailed description by referring the TORs and give item wise cost.

*Accommodation/Travel Cost will be reimbursed on actual to selected company for which company has to provide Hotel & Travel Invoices.