**University Meets Microfinance II**

**The final evaluation of the University Meets Microfinance II (UMM).**

**Technical Proposal**

**Reference: UMM\_EVAL\_PP**

**Submission date:**

**Contacts**

Name:

Status:

Address:

Email:

Telephone:

Name:

Status:

Address:

Email:

Telephone:

**Submission letter**

*Date, place*

**Title of the tender:**

Dear Sir or Madam:

***Name of the consulting firm*** offers its professional services as consultant for the project: ***title of the project.***

We hereby submit our technical proposal. As specified in the Terms of Reference, in addition to this present technical proposal a financial proposal is presented separately.

Should you give a favorable response to this proposal, we commit to deliver the totality of the services defined in the contract on time as per the calendar stipulated by Positive Planet.

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

Yours sincerely,

*Responsible:*

Signature \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

*Name of signatory*

*Position*

*Organization*

*Email*

**Contents**

*The Consultant is expected to apply the following guidelines. Positive Planet might reject any proposal submitted under another format and size. The Consultant is nevertheless granted to apply its own graphic charter.*

*The Consultant is expected to replace this page by a detailed overview according to its Technical Proposal, including the page number.*

1. **Comments on the Terms of Reference 🡪** 2 pages **max**
2. **Methodology**
3. Challenges and issues at stake 🡪 1 page **max**
4. Description of activities 🡪 10 pages **max**
5. Planning 🡪 2 pages **max**
6. **Working team and experience**
7. Team Organigram 🡪 1 page **max**
8. Composition and tasks repartition 🡪 1 page **max**
9. Team members’ short biographies 🡪 ½ page per specialist **max**

**Annex 1 – Presentation of the Consultant 🡪** 3 pages **max**

**Annex 2 – References 🡪** 1 page per reference **max**

**Annex 3 – Detailed CV (European Union Format) 🡪** no size limit

1. **Comments and/or suggestion on the Terms of Reference**

[*Present and justify here any modifications to the Terms of Reference your consulting firm/organization would like to propose, if there are any, to perform the assignment better and more effectively (e.g. deleting some activity that you find unnecessary, adding others or proposing a different phasing of the activities). Such suggestions should be concise and incorporated in your Proposal.*]

1. **Methodology**
2. **Challenges and issues at stake**

[*Present and justify here any challenges and issues related to the thematic of the UMM initiative and the targeted countries. Explain whether the designed solutions were relevant or not regarding the maturity stage of the UMM partners and beneficiaries.]*

1. **Description of activities**

*[In this sub section 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 TOR 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 Terms of Reference.]*

1. **Planning**

*[Indicative format below. The expected planning must be broken down by week, and present the activities, milestones, critical path and deliverables.]*

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| **N°** | **Activity[[1]](#footnote-1)** | **Weeks[[2]](#footnote-2)** | | | | | | | | | | | | |
| **1** | **2** | **3** | **4** | **5** | **6** | **7** | **8** | **9** | **10** | **11** | **12** | **n** |
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1. **Working team and experience**

*[In this sub section 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.]*

1. **Team Organigram**

*[The Consultant is expected to propose a synthetic schema that present the whole team and links between the team members and their specific attributions.]*

1. **Composition and tasks repartition**

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| --- | --- | --- | --- | --- | --- |
| Name of Staff & associated Firm[[3]](#footnote-3) | Area of Expertise Relevant to the Assignment | Designation for this Assignment[[4]](#footnote-4) | Assigned Tasks or Deliverables | Location[[5]](#footnote-5) | Number of Days |
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1. **Team members’ short biographies**

*[The Consultant is expected to give a brief insight regarding the ability of each team member to conduct its tasks and responsibilities according to his past experience.]*

**Annex 1 – Presentation of the Consultant**

[*Briefly describe the background and organization of your consulting firm/organization and the sub consultant/s that your consulting firm/organization proposes to engage for this assignment.*]

**Annex 2 – References**

[*Using the format below, provide information on at least 3 previous consulting assignments similar to the assignment subject of this solicitation for which your consulting firm/organization and the sub consultants for this assignment were engaged either individually as distinct corporate entities or jointly as members of an association or consortium of corporate entities. Please use one box for each assignment and use extra sheets, as necessary. Similar experience during the last 5 years only will be relevant.*]

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| --- | --- |
| Assignment name: | Approx. value of the contract (in current US$): |
| Country:  Location within country: | Duration of assignment (months): |
| Name of Client & contact: | Total No. of staff-months of the assignment: |
| Contact Person, Title/Designation, Tel. No./Address: |  |
| Start date (month/year):  Completion date (month/year): | No. of professional staff-months provided by your consulting firm/organization or your sub consultants: |
| Name of associated Consultants, if any: | Name of senior professional staff of your consulting firm/organization involved and designation and/or functions performed (e.g. Project Director/Coordinator, Team Leader): |
| Description of Project: | |
| Description of actual services provided by your staff within the assignment: | |

**Annex 3 – Detailed CV (European Union Format)**

**Curriculum vitae**

**Proposed role in the project:**

**Category:**

**Staff of <name of the firm>**

Family name:

First names:

Date of birth:

Passport holder:

Education:

|  |  |
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| Institution  (Date from - Date to) | Degree(s) or Diploma(s) obtained: |
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**Language skills:** Indicate competence on a scale of 1 to 5 (1 - excellent; 5 - basic)

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| --- | --- | --- | --- |
| Language | Reading | Speaking | Writing |
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Membership of professional bodies:

**Other skills:** (e.g. Computer literacy, etc.)

Present position:

Years within the firm:

**Key qualifications:** (Relevant to the project)

Specific experience in the region:

|  |  |
| --- | --- |
| Country | Date from - Date to |
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Professional experience

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| --- | --- | --- | --- | --- | --- |
| Date from - Date to | Location | | Company& reference person[[6]](#footnote-6) (name & contact details) | Position | Description |
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Other relevant information (e.g., Publications)

**Certification**

I certify that (1) to the best of my knowledge and belief, this CV correctly describes me, my qualifications, and my experience; (2) that I am available for the assignment for which I am proposed; and (3) that I am proposed only by one Offeror and under one proposal.

I understand that any wilful misstatement or misrepresentation herein may lead to my disqualification or removal from the selected team undertaking the assignment.

Date:

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

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, etc. For phased assignments indicate activities, delivery of reports, and benchmarks separately for each phase. [↑](#footnote-ref-1)
2. Duration of activities shall be indicated in the form of a bar chart. [↑](#footnote-ref-2)
3. Indicate if the proposed staff is an employee or agent of your consulting firm/organization or a sub consultant. [↑](#footnote-ref-3)
4. Title or position as described in the TOR or otherwise named in your proposed Organization and Staffing under Section D, sub section (c). [↑](#footnote-ref-4)
5. Relative to the assignment subject of the Contract, indicate if the staff/consultant local or international. [↑](#footnote-ref-5)
6. The Contracting Authority reserves the right to contact the reference persons. If you have any objection to this fact, kindly state so and provide a justification [↑](#footnote-ref-6)