**JAMAICA SOCIAL INVESTMENT FUND**

**ISO 14001:2004 CERTIFIED**

**“INVESTING FOR COMMUNITY DEVELOPMENT”**

# Expression of Interest (EOI) Submission- Standard Forms

**Consultant Firm for Country Project Framework, Country Project Completion reports and impact Assessment for the Basic Needs Trust Fund Programme**

1. **TEMPLATE OF EOI Submission Letter**

Location:………………………….

Date: ....................................

To:

The Managing Director

Jamaica Social Investment Fund

Ground Floor, The Dorchester

11 Oxford Road

Kingston 5

Ladies/Gentlemen:

We, the undersigned, offer to provide the consulting services for \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ in accordance with your Expression of Interest (EOI) notice dated \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ and our EOI. We are hereby submitting our EOI as per the instructions provided.

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

Yours sincerely,

Authorized Signature:

Name and Title of Signatory:

Name of Firm:

Address:

Seal of the Firm:

**Important Notice**

***The documents submitted with the Expression of Interest (EOI) must contain sufficient information to enable a comprehensive assessment of the Firm to be carried out. The information submitted will form the basis on which the scoring will be carried out and will determine the ranking of the Firm or whether or not the Firm is shortlisted.***

***Additional documents or forms may be submitted in response this request for Expression of Interest (EOI).***

1. **Description of the Firm**

**1. Information of Firm**

|  |
| --- |
| **FIRM** |
| Name of the Firm: |
| Address: |
| Telephone No.: |
| Fax No.: |
| Email: |
| Date of Registration: |
| Type of firm: |
| TCC No.: |
| Contact Person: |
| Name: |
| Designation: |

**2. Legal Documents**

For verification purposes the firm shall submit:

* Copies of company’s registration documents and
* Tax compliance certificate

**3. Company Profile and Organization Structure**

Provide a brief (two pages) description of the background and organization of your firm/entity and each associate for this assignment. In this section the Firm shall also provide the following information:

* Brief company profile covering its:
  + Objectives,
  + Working areas,
  + General experience
  + Organization structure.
  + Include Company profile (if available)
* To be completed using **[Form TECH 2 (a)]**

1. **Human Resources Available with the Firm**

* Provide the information in the following table. The firm/s shall provide information about professional staff that is available to the firm and who form a part of the organization structure of the firm; **no** CVs are required to be submitted at this stage.

|  |  |  |  |
| --- | --- | --- | --- |
| **Name of Staff** | **Position** | **Qualification** | **Years of Experience** |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

1. **Experience of the Firm**

**4. Information Regarding Experience of the** **Firm/s**

1. Specific Experience of the Firm: (*To be inserted as outlined in the Terms of Reference*)
2. To be completed using **[Form TECH 2 (b)]**

**Summary**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Name of Project/ Location** | **Client Name and Address** | **Start Date** | **Completion Date** | **Description of work** |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |

1. **Evaluation Criteria & Sub-Criteria**

**6. Evaluation Criteria & Sub-Criteria [***To be modified for each assignment***]**

|  |  |
| --- | --- |
| **Criteria, Sub-Criteria** | **Weighting (Points)** |
| 1. **Consultant’s General Experience [Tech Form 2 (b)]** | **15** |
| 1. *General Experience in relevant sector [as per EOI]*  * ***5 or more evaluation reports of social and economic projects for government or international agencies/organizations completed.*** * ***3-4 evaluation reports of social and economic projects for government or international agencies/organizations completed.*** * ***Up to 2 evaluation reports of social and economic projects for government or international agencies/organizations completed.*** |  |
| 1. **Consultant’s Specific Experience [Tech Form 2 (b)]** | **45** |
| 1. *Specific Experience of Firm [as per EOI]*  * ***10 years’ or more experience using triangulated qualitative and quantitative research methodologies*** * ***7-9 years’ or more experience using triangulated qualitative and quantitative research methodologies*** * ***4-6 years’ or more experience using triangulated qualitative and quantitative research methodologies*** * ***1-3 years’ or more experience using triangulated qualitative and quantitative research methodologies*** * ***7 years’ experience conducting assignments requiring the use of Statistical Package for Social Sciences (SPSS) and NVivo.*** * **4-6 years’ experience conducting assignments requiring the use of Statistical Package for Social Sciences (SPSS) and NVivo.** * ***1-3 years’ experience conducting assignments requiring the use of Statistical Package for Social Sciences (SPSS) and NVivo.*** * ***Eight years’ experience using PLA and other participatory research methodologies*** * ***5-7 years’ experience using PLA and other participatory research methodologies*** * ***3-4 years’ experience using PLA and other participatory research methodologies*** * ***1-2 years’ experience using PLA and other participatory research methodologies*** * ***7 years’ experience using Cost Benefit Analyses, Cost Effectiveness Analysis, Break-Even; etc. especially as it relates to social and economic investments).*** * ***4-6 years’ experience using Cost Benefit Analyses, Cost Effectiveness Analysis, Break-Even; etc. especially as it relates to social and economic investments).*** * ***1-3 years’ experience using Cost Benefit Analyses, Cost Effectiveness Analysis, Break-Even; etc. especially as it relates to social and economic investments).*** |  |
| 1. **Organizational Capacity** | **40** |
| * ***Team Leader with a minimum of eight years’ experience in Designing/developing, monitoring and evaluating (including impact assessments) of social and economic projects/programmes*** * ***Less than 8 years but more than 4 years*** * ***Four years’ experience or less*** * ***Additional key expert with at least seven years’ experience conducting financial analysis of social and economic infrastructure and/or social investments.*** * ***Less than 7 years but more 4 years conducting financial analysis of social and economic infrastructure and/or social investments.*** * ***Four years or less conducting financial analysis of social and economic infrastructure and/or social investments.*** |  |
| **Total Points** | **100** |
| **Minimum Required Points to be Shortlisted** | **75** |

Form TECH-2: Consultant’s Organization and Experience

A - Consultant’s Organization

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

B - Consultant’s 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 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:

**A QUICK GUIDE TO**

**CONSULTANTS QUALIFICATION SELECTION (CQS) METHOD**

Consultants Qualification Selection Method (CQS) is used when, based on the nature and complexity of the project, the issuing of a Request for Proposal (RFP) is not required.

Below is the evaluation and award process for CQS.

1. Requests for Expressions of Interest (REOI) are published in the Newspapers **or** if the estimated budget is below the threshold for advertisement will be sent to qualified Firms on the JSIF database
2. If the REOI is published Firms are advised to check the JSIF website where they can download the Expressions of Interest Standard Form (EOISF) and Terms of Reference (TOR) which includes Evaluation Criteria **or** If not published, REOIs and the relevant documents will be sent to qualified Firms from the JSIF database
3. Consultancy Firms will submit the Expressions of Interest Standard Form and the relevant documents required (these documents are listed in the EOISF) on the date specified
4. The Firms who express interest will be evaluated based on the Evaluation Criteria in the TOR
5. On completion of the evaluation, the Firm that achieves the highest score will be invited to submit a combined Technical and Financial Proposal
6. The Technical and Financial Proposal will be assessed to ensure that the requirements of the TOR are met and the proposal is in keeping with the project’s estimated budget. Thereafter, the Firm will be invited to negotiate a contract
7. If the Client (JSIF) and the Firm cannot reach an agreement the Firm with the next highest score will be invited to submit a combined Technical and Financial Proposal
8. If negotiations between JSIF and the Firm is successful, a contract will be entered into with the Firm
9. The unsuccessful Firms will be written to, advising them of the Firm that was awarded the Contract.