

**GOVERNMENT OF PAKISTAN
PLANNING COMMISSION
M/O PLANNING, DEVELOPMENT & SPECIAL INITIATIVES
(PROJECTS WING)**

A	Criteria	Unit
1	General experience in consultancies	5 years
2	No of projects for which consultancy services provided	5
3	Relevant experience related to M&E	5 years
4	Relevant experience related to M&E in Public sector	3 years
5	Financial turnover per annum (last three years)	10 million
B	Categories of qualification: 1. Roads 2. Water/Dams 3. Power 4. Health 5. Education 6. Buildings 7. Climate change	
C	Information required with proposal (EOI): a. Firm's profile b. Valid Registration with the relevant professional body (e.g. PEC etc.) and Provincial Revenue Authority. c. Registration with SECP, Registrar of Firms, Chamber of Commerce, or any other body depicting legal status of Firm, Company or organization. d. National Tax Registration & provision revenue authorities (GST) number with active taxpayer status. e. Undertaking by the firm / company on a legal paper/stamp paper/Letter Head that it is currently not blacklisted by any Federal, Provincial, State or Local Government department and/or by any Government owned Company/ Foundation / Authority.	

The proposals may reach the office of the undersigned on or before 5th August 2021 by 1430 hrs which shall be opened on the same date at 1500 hrs. For detailed TORs of the assignment, please visit the following page: www.pc.gov.pk & www.ppra.org.pk

S.R Usmani
Project Director
Strengthening of Ministry of Planning, Development and Special Initiatives in M&E of PSDP Projects,
PPMI Complex, H-8/1, Islamabad
Ph# 051-9269768

TERMS OF REFERENCE: PROVISION OF M&E SERVICES

ABSTRACT:

The Expression of Interest is meant to pre-qualify – based on a pre-defined criteria – a list of M&E firms which could be contracted immediately for specialized M&E tasks, mainly (i) third party verifications; and (ii) external evaluations. Through this advertisement, the Planning Commission of Pakistan will (i) establish a pool of pre-qualified firms; (ii) invite them for selected completion on specific M&E tasks, by issuing task-based ToRs; (iii) award contracts to selected firms based on the suitability of their technical and financial proposals; and iv) commission M&E tasks.

The ToRs for the Provision of M&E Services provides the detailed background, objective, scope, criteria and contract awarding process.

ABOUT PLANNING COMMISSION OF PAKISTAN

The Planning Commission is one of the core institutions of the Government of Pakistan with a mandate to undertake policy research, provide medium- to long-term economic vision of the country and play a central role in public sector development planning, management and monitoring. The Planning Commission comes under Ministry of Planning, Development and Reforms, and works in close collaboration with the Ministry of Finance (MoF), other federal ministries and departments and with provincial governments.

Some of the key planning documents produced and managed by the Planning Commission are:

- Pakistan Vision 2025
- Medium-term Development Framework (3 year rolling development programme)
- Public Sector Development Programme (annual development programme, with projects and budget allocations by ministry/ division)
- Manual for Development Projects

ABOUT PUBLIC SECTOR DEVELOPMENT PROGRAMME (PSDP)

The Public Sector Development Programme (PSDP) is an important document – developed annually and as part of the budget – that reflects the public sector investments on development programmes and projects prepared by the Federal Government and its ministries/ division.

The PSDP is designed to induce growth as set out in the Vision 2025, accelerate economic growth, ensure equitable socio-economic development across the regions and provinces, and create an enabling environment for private sector investments. The PSDP only reflects projects and programme being funded by the Federal Government, and these are in addition to resources that are invested by provincial and local governments for the development in country.

The PSDP projects are implemented and managed by the sponsoring ministries and executed by different departments/institutions, whereas Planning Commission provides oversight, coordination, monitoring and evaluation role.

The PSDP for 2021-22 has 1,198 projects with an outlay of Rs. 900 billion. 360 projects are mega projects costing Rs. 2 billion and above. The projects are spread all over the country, and in a range of sectors such as:

- Infrastructure development, including projects relating to the construction of large dams and water conservation systems; large-scale bridges, roads, highways and motorways; inter-provincial and regional connectivity projects, airport, energy and housing, public health and education facilities, etc.
- Social sector, including health, education, social protection, increasing employment and livelihood opportunities, reducing regional disparities, sustainable development goals achievement programmes, youth programmes, etc.
- Productive sectors, including enhancing agricultural productivity & ensuring food security; SMEs, industries and large-scale manufacturing; services sector and building knowledge economy, expo centres etc.
- Environment and climate change, including projects relating to climate change mitigation and adaption, green Pakistan programme, etc.
- Special development packages, including the Accelerated Development Plan for Southern Balochistan, Karachi Transformation Plan, Socio-Economic Development of Gilgit Baltistan, Sindh Development Plan for 14+ Priority Districts and enhanced allocation for Newly Merged Districts of Khyber Pakhtunkhwa., etc. meant to addressing regional disparities.

THE PSDP M&E FRAMEWORK FOR DEVELOPMENT PROJECTS

The M&E Framework of the PSDP is set to achieve the following objectives:

- Ensure timely execution of the projects within the parameters of procurement and other rules and regulations i.e. within time, allocated resources and as per defined quality standards.
- Achieve the intended results at output, outcome, and impact level. The results defined in the PC-1 document of each project, with contribution/ attribution of the project towards Vision 2025, and the SDG's agenda for 2030 at outcome and impact level.
- Generate evidence and learning for PCP, federal ministries and departments at an operational as well as strategic level. The operational level learning aims to inform the design, implementation, management, etc of the individual/ selected projects; while strategic level learning aims to inform the investment choices of the Government of Pakistan by providing evidence-based recommendations on relevance, effectiveness, impact and value for money aspects of selected projects.
- Promote transparency and accountability, by strengthening performance management function and credibility of reporting on physical and financial progress, as well on intended results.

PLANNING PROFORMAE – AND WHERE M&E SYSTEM FITS IN?

	PC-I PROFORMA	PC-II PROFORMA	PC-III PROFORMA	PC-IV PROFORMA	PC-V PROFORMA
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Planning cycle/ process	Project planning/ design document, with information on project title, location, objectives, implementation arrangement, budget and financial plan, results, etc. along-with names and designations of government officials who developed, checked and approved the project PC-1.	Feasibility study of a large-scale development project, including complete survey and experts' opinions on justification of project.	Quarterly progress report, including details on physical, financial progress, achievement of milestones and identification of bottlenecks/ challenges.	Project completion report, including self-assessment of project financial and physical progress and internal analysis of project outputs.	Project impact assessment report, in comparison with baseline, mid-term evaluation and with regard to operation and maintenance.
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The internal M&E system of the Planning Commission is designed around the following:

DATA/ INFORMATION MANAGEMENT SYSTEM (IMS)

- The IMS involves digitalization of PC-Is documents, entering key numerical information of the projects on the data/MIS, updating progress reports of the projects
- The information is processed, analyzed to generate meaningful information on physical and financial status of projects.

MONITORING

- Desk-based monitoring, through system-based tracking of implementation of project activities including physical and financial progress.
- Internal field-based monitoring/ verification, by undertaking physical monitoring/verification, using checklist, against either reported progress, or a defined criteria.
- Third-party verification, by engaging independent/ external firms to undertake physical, site-based monitoring/verification, using checklist, against either reported progress, or a defined criteria.

EVALUATION

- Formative mid-term evaluation of selected ongoing projects through mix-method approach (as appropriate, cost-effective) to assess the relevance (justification), efficiency (physical & financial progress) and effectiveness (contribution or intended contribution towards outputs/outcomes) of the projects.
- Summative, project end-evaluations of selected projects which are completed and for which PC-IV's (project completion reports) are received. In most cases, these evaluations will be done using non-experimental, mixed-method approaches (as appropriate, but cost-effective) with focus on
- Impact evaluation using experimental approaches for selected, flagship projects, and where evaluation findings would lead to define future investments of the government.

PURPOSE

- To identify, prelist and engage M&E firms for monitoring and evaluation of selected PSDP projects. Specifically, the Planning Commission intends to engage services of external firms, having specialization in M&E and related sectoral and geographical experience to undertake M&E of selected PSDP projects on behalf of the Commission.

The objective is to:

- Engage professional/ specialized firms with experience and expertise in undertaking M&E of large scale, complex and multidisciplinary projects; and
- Brining in external, expert's perspective on delivery, relevance, efficiency, effectiveness, impact and sustainability of PSDP funded projects.

SCOPE OF WORK:

Since the PSDP for 2021-22 has 1,198 projects, with an outlay of Rs. 900 billion, spanning across various geographical areas and sectors, **the scope of M&E tasks** is narrowed to following

- **Technical focus** for external firms would be around (i) third-party verification of selected projects, through task-based ToRs; and (ii) formative, summative and impact evaluation of selected projects as identified by the Planning Commission, through task-based ToRs
- **Thematic or sector focus** of assigned M&E tasks would be around multiple sectors such as infrastructure development, social sector, productive sectors, environment and climate change etc.
- **Geographical focus** of the assigned M&E tasks would be around provinces, regions and districts of Pakistan.

The M&E tasks would require the following sub-tasks from selected firms:

- Inception report, defining the objectives, scope, methodology, sampling, data collection tools, data analysis approach, field plan, outline of the M&E report, and overall timelines of the M&E task.
- Data collection, both primary and the secondary data; quantitative and qualitative, using data collection tools and formats as agreed/ approved in the inception report.
- Analysis and presentation of findings to the PCP/ M&E focal persons and other staff as PCP would deem relevant.
- Development of a draft report, as per the outline approved in the inception report.
- Receiving and incorporating PCP's feedback and comments in the draft report
- Finalizing and submitting the report, written in English, formatted and copy-edited.

KEY CONSIDERATIONS FOR PRE-QUALIFIED M&E FIRMS

Considering the breadth and depth of PSDP's projects, Planning Commission is inviting the expression of interest from all interested firms, meeting the eligibility criteria, for provision of M&E services. There is no limit on numbers of pre-qualified firms, as the M&E tasks are enormous and require range of firms with M&E expertise to deliver the function. Also, the Planning Commission understands that no individual firm can deliver all the evaluations, considering the number of projects which need to be monitored and evaluated, the diversity in projects' sectors, and the geographical spread; therefore, a pool of firms would resolve the challenge of finding appropriate contractor/ firm for individuals M&E tasks.

The general qualification for eligible firms for prelisting would be as follows:

- Extensive experience of designing, managing and delivering M&E assignments, particularly third-party verification and external evaluations.
- Highly specialized data management, collection, analysis, interpretation and presentation skills
- Demonstrated experience in use of technology and advance statistical software for data collection, analysis and presentation
- Sectoral experience, with specialization in one or more preferential areas of Planning Commission and around PSDP projects (infrastructure, energy, communication, education, health, housing, climate change, large dams, etc.)
- Geographical experience, with existence and outreach in one or more geographical areas of the Planning Commission and around PSDP projects (urban/ rural; districts, regional, provincial, or national)

PROCUREMENT PROCESS - PROCEDURES OF OPEN COMPETITIVE BIDDING (AS PER PPRA RULES)

Single stage – one envelope procedure will be followed for the pre-qualified of M&E firms. This means that each bid (submitted by interested firms) will comprise of one single envelope containing the technical proposal on below mentioned criteria points. All bids received will be opened by the evaluation committee for review, approval and notification of pre-qualified firms.

S. #	CRITERIA POINT	TOTAL SCORE	SCORING CRITERIA
1	Relevant experience and past performance	50	
	Relevant experience in designing, managing and delivering M&E assignments, particularly third-party verification and external evaluations	20	Years of experience <ul style="list-style-type: none"> • 10-years or more: 15-20 marks • 5-9 years: 8-14 marks • 4-years or less: 0-7 marks The certificate of satisfactory completion of past M&E projects (from clients) will be used to define scores within each range.
	Experience of working with the Federal and/or provincial governments (in public sector, and related to planning, appraisal, implementation, and monitoring and evaluation of development projects)	10	Number of assignments <ul style="list-style-type: none"> • 10 or more: 8-10 marks • 6-9 assignments: 4-7 marks • Less than 5: 0-3 marks The certificate of satisfactory completion of past M&E projects from relevant government department will be used to define scores within each range.
	Highly specialized data management, collection, analysis, interpretation and presentation skills	10	Certified software with subscription – list of software <ul style="list-style-type: none"> • Statistical analysis (advance): 0-3 marks • Descriptive analysis: 0-3 marks • Qualitative analysis: 0-2 marks • Interpretation/ Presentation: 0-2 marks

S. #	CRITERIA POINT	TOTAL SCORE	SCORING CRITERIA
	Sectoral experience, with specialization in one or more preferential areas of Planning Commission and around PSDP projects (infrastructure development, social sector, productive sectors, environment and climate change, etc.)	10	Number of PSDP project sectors <ul style="list-style-type: none"> • 3 or more sectors: 7-10 marks • 2-3 sectors: 4-6 marks • 1 sector: 0-3 marks
2	Capabilities with respect to personnel, technology & geographical coverage	25	
	Core team of M&E and sectoral professional (current)	15	Team on payroll <ul style="list-style-type: none"> • M&E professionals: 4 marks • Sectoral experts: 2 marks • Data analysts: 2 marks • Field-based/ enumerators: 2 marks
	Geographical experience, with existence and outreach in one or more geographical areas of the PSDP projects	10	Presence in Pakistan's geographical area (direct/ firm's offices/ staff or through partners <ul style="list-style-type: none"> • All four provinces: 7-10 marks • One or more provinces: 3-6 marks • Federal (only): 1-3 marks
3	Financial position	15	
	Annual turnover in PAK Rupees (last three years, verified from financial and audit reports)	10	Annual turnover in PAK Rupees (last three years, verified from financial and audit reports) <ul style="list-style-type: none"> • PKR. 20 million or more: 10 marks • PKR. 11-19 million: 5-9 marks • PKR. 10 million or less: 0-4 marks
	- Audited reports	5	Number of years for which audit reports are available <ul style="list-style-type: none"> • 3 or more years: 5 marks • 1-2 years: 1-4 marks
4	Appropriate managerial capability	10	
	Governance & management structure	5	Availability of system <ul style="list-style-type: none"> • Yes: 1-5 marks • No: 0 marks
	Financial and HR management system: 0-3 marks	5	Availability of system (manuals, software etc.) <ul style="list-style-type: none"> • Yes: 1-5 marks • No: 0 marks
	Total	100	

STEP-WISE PROCESS TO SELECT AND ENGAGE M&E FIRMS

Step-1. Long list of pre-qualified firms, based on the prescribed criteria (see main advertisement). The qualified, selected firms will be notified of their selection. No format contract will be signed at this stage; however, Planning Commission will be bound to consider these first for any M&E outsourcing activity. In case of a written

decline by these pre-qualified firms, the Planning Commission will contract beyond these firms to delivery M&E task(s).

Step-2. Sharing of M&E task-based ToRs with pre-qualified firms for technical and financial proposal. This will be issued internally among pre-qualified firms (based on their technical capability, interest, geographical outreach, financial competitiveness etc.), and the most appropriate will be offered a task-based contract. The contracts will be deliverable based i.e. payments will be in tranches and linked to key deliverables/outputs in the ToRs.

Step-3. Closure of contract, with feedback and certificate on quality of TOR's delivery. These would be used to (i) provide appreciation certificates to firms exceeding expectations (against ToRs); (ii) constructive feedback to firms meeting or moderately meeting expectations (against ToRs); and (iii) warnings/ exclusions from per-qualified list of firms to those firms who fail to meet expectations.