

GOVERNMENT OF SAMOA



RECRUITMENT OF TECHNICAL SUPPORT FOR PREPARATION OF A FINANCE SECTOR PLAN



The Government of Samoa is seeking to recruit a Facilitator/ Finance Sector Planning Expert for 50 working days to assist the Ministry of Finance in developing and formulating a Finance Sector Plan.

Detailed Terms of Reference and information on the application procedure are available from the following web site (ref: PFMR2/2011/11): www.mof.gov.ws under Services/Procurement. The deadline for submission is 10.00am local Samoan time on Monday 19th December 2011. Applications must be submitted to: Secretary Tenderø Board, 4th Floor, Central Bank Building, Ministry of Finance, Private Bag, Apia, Samoa. For clarification or further information contact: Lae Siliva ó email: lae.siliva@mof.gov.ws Tel: +685 34404



GOVERNMENT OF THE INDEPENDENT STATE OF SAMOA

MINISTRY OF FINANCE

**RECRUITMENT OF FACILITATOR/FINANCE SECTOR
PLANNING EXPERT**

REQUEST FOR QUOTATION

RFQ Reference: PFMR2/2011/11

NOVEMBER 2011

Letter of Invitation

1. Request for Quotations

The Ministry of Finance, hereinafter the Procuring Entity, intends to apply funds from AusAID (Performance-Linked Aid) for the recruitment of an Facilitator/ Sector Planning Expert(s) to assist the Ministry of Finance in Developing a Finance sector plan

2. Eligibility of Consultants.

The consultant must not have been convicted within the last year of, or currently under indictment for, a criminal offence involving corruption or other misconduct reflecting a lack of suitability to participate in procurement.

3. Terms of Reference

The Procuring Entity herewith invites quotations (COVER LETTER CV(s) + Cost Estimate) for the services described in Annex 1 of this RFQ.

4. Curriculum Vitae

You are hereby invited to submit your letter of motivation highlighting relevant experience and skills, and Curriculum Vitae (CV). Please find below in Annex 2 a sample form of a CV to be utilized when submitting your quotation.

5. Cost Estimate of Services

You should also provide a Financial Quotation. Please find below in Annex 3 a sample form of Cost Estimate of Services and Schedule of Rates. The maximum budget available for this contract is 80,000 SAT inclusive of VAGST.

6. Preparation and Submission of Quotations

Quotations must be delivered with one original and two copies. The Cover letter and CV shall be placed in a sealed envelope clearly marked "Curriculum Vitae" followed by the RFQ Number and the name of the assignment, as indicated above in the present letter.

Similarly, the Financial Quotation shall be placed in a separate sealed envelope clearly marked "Financial Quotation" followed by the RFQ Number and the name of the assignment as indicated above in the present letter and with a warning "Do Not Open With the Curriculum Vitae." The envelopes containing, respectively, the CV and the Financial Quotation shall be placed into an outer envelope and sealed. This outer envelope shall bear the submission address, RFQ number, name of the assignment, submission deadline and offer validity, and be clearly marked "Do Not Open, except during the proposal opening session." The address for submission is as follows:

**Secretary Tender's Board
4th Floor, Central Bank Building,
Beach Road
Ministry of Finance,
Private bag
Apia, Samoa.**

Submission must be by hand delivery, mail or courier. Email or fax submissions will not be accepted.

The Procuring Entity shall not be responsible for misplacement, loss or premature opening if the outer envelope is not sealed and/or marked as stipulated. This circumstance may cause the rejection of the quotation. If the Financial Quotation is not submitted in a separate sealed envelope duly marked as indicated above, this will constitute grounds for rejecting the Proposal. **The Cover letter and CV shall not include any financial information which may totally or partially disclose the quoted price.** A CV containing such financial information shall be rejected.

7. Information on tax in Samoa

This Contract is subject to taxation in Samoa. The Consultant must quote fee rates including any taxes payable in Samoa as set out in Annex 3.

7. Evaluation Procedure

a) Evaluation of CVs

The Evaluation Committee shall evaluate the Cover letter and CVs on the basis of their compliance with the requirements of the TOR, experience and qualifications of the Consultant, suitability to the assignment, language, and knowledge of local conditions. Each acceptable CV will be given a technical score (**St**). A CV shall be rejected at this stage if it fails to achieve the minimum technical score of 70 points. A team of experts with more than one CV will also be considered. In this case the evaluation will consider the expertise of the team as a whole.

CVs will be evaluated in accordance to the following criteria:

Criteria	Maximum score
Qualifications	15
Relevant experience in the development or implementation of sector plans	35
Experience in planning and facilitating participatory processes/ workshops	20
Knowledge of the Finance Sector in Samoa	20
Report writing skills	10
TOTAL	100

b) Evaluation of the Financial Quotation

The lowest quote will be noted 100 points. The formula for determining the financial score **Sf** is the following:

$$Sf = 100 \times Pi/Pm, \text{ where}$$

Sf is the point given to the quotation
Pi is the lowest quote
Pm is the price of the evaluated quotation

c) Global evaluation of the Quotation

The CV is given a weight of 80% and the financial quotation 20%. The global score is determined as follows: $S = 80\% St + 20\% Sf$

Where:

S is the global score
St is the score of the technical proposal
Sf is the score of the financial proposal

The quotation achieving the highest combined technical and financial score will be selected.

8. Date for Submission

You are requested to provide your quotation at the latest by **10am (local Samoan time) on Monday 19th December 2011.**

9. Validity of Quotation

The quotation shall remain valid for a period not less than 60 days after the deadline date specified for submission.

10. Please note that the cost of preparing a quotation and of negotiating a contract is not reimbursable as a direct cost of the assignment.

11. The following documents are attached to this Letter of Invitation:

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|---|---------|
| I. Terms of Reference | Annex 1 |
| II. Sample Format of Curriculum Vitae (CV) | Annex 2 |
| III. Sample Cost Estimate of Services and Schedule of Rates | Annex 3 |

12. If you require further information on the assignment and the local conditions, you may contact Lae Siliva at the following phone number and address: lae.siliva@mof.gov.ws. Tel: +685 34404, Address: Level 3, Ministry of Finance, Central Bank Building, Private bag, Apia, Samoa.

13. The Client is not bound to accept any of the quotations submitted.

Yours sincerely,

CHIEF EXECUTIVE OFFICER
MINISTRY OF FINANCE

Annex 1



GOVERNMENT OF SAMOA

Phase 2

Public Finance Management Reform Plan



TERMS OF REFERENCE

TECHNICAL SUPPORT FOR PREPARATION OF A FINANCE SECTOR PLAN

1. Background

The Government of Samoa has adopted a sector-wide approach for its planning framework. The Finance Sector has been identified as one of the sectors to be developed within this framework. Since 2008 the Ministry of Finance in collaboration with the Audit Office and the Ministry for Revenue has been implementing a Public Finance Management Reform Plan. In December 2010 the 2nd Phase of the PFM Reform Plan was submitted to Cabinet for approval together with a proposal to form a higher level committee to oversee the development of a Finance Sector Plan incorporating the roles of MoF, CBS, MfR, SBS and the Audit Office. This plan would build on the strategic plans already developed under the PFM Reform initiative with an enlarged scope to include the roles of CBS and SBS. The main benefits foreseen from the transition to a sector wide approach include:

- improved coordination and institutional linkages between the central agencies of Government,
- agreement on common priorities, objectives, strategies, and vision
- improved coordination with external stakeholders, in particular the private sector and development partners
- Sharing of expertise and technical support
- improved performance monitoring
- improved capacity to prioritise resources and obtain support for key reforms/actions

A Concept paper for the proposed development of the Finance Sector was presented to the CEOs of the central agencies on 9th March 2011. This led to the formation of an Advisory Committee, chaired by MoF and consisting of the head of agencies, to support the preparation and implementation of the plan. As a first step it was agreed to recruit a Finance Sector Coordinator at ACEO level based in MoF to support the initiative. The new Coordinator commenced work in September 2011. The 2nd meeting of the Advisory Committee endorsed the proposal to recruit technical support to facilitate consultations and assist with drafting a Finance Sector plan taking into account ongoing initiatives, plans and existing institutional arrangements.

2. Objective

The objective of this assignment is to assist the Finance Sector Advisory Committee to prepare a 5 year Finance Sector Plan, covering the period 2012-2017.

3. Detailed Tasks

The detailed tasks for this assignment are as follows:

- Undertake a review of existing documentation relating to the Finance sector. This includes the draft Finance Sector Issues Paper, ISPs, PFM Reform Plans and Reports, PEFA assessments, IMF and other Macro-economic reports, Corporate Plans, Annual Reports, etc.
- Facilitate internal consultations between the central agencies on the scope, problems, and opportunities relating to the development of a Finance Sector in Samoa.
- Identify key stakeholders to the Finance Sector including both Government, private sector and Non-Government for participation in the development of the sector plan. Consider in each case the level of interest and influence on outcomes.
- Hold a series of workshops to consult on the development of the sector plan involving all key stakeholders to obtain inputs and contribute to the consensus on issues, problems and opportunities leading to the drafting of a long-term vision and medium term objectives for the sector
- Draft a first outline of the Finance Sector Plan, identifying key issues/problems, options and priority objectives based on the initial review and consultations. Ensure that the views of the central agencies are well reflected in the draft. Arrange a presentation of the outline to the Advisory Committee and workshops with the main stakeholders.
- Recommend options for institutional arrangements to support the implementation and monitoring of the Finance Sector Plan utilizing existing arrangements wherever appropriate. The proposed options should include the engagement of non-Government stakeholders where appropriate.
- Propose options for key performance indicators for the Sector Plan objectives.
- Prepare a draft prioritized investment plan with timeframe for the sector action plan with information on ongoing projects/actions and future gaps requiring resources to achieve the proposed objectives.
- Present the draft Finance Sector Plan to the central agencies together with selected key stakeholders and facilitate discussions on the draft including any options presented in relation to institutional arrangements and performance measures.

4. Methodology

The consultant should make every effort to ensure the ownership of the Sector Plan by the central agencies responsible for implementation. This will be achieved through a participatory process ensuring that the key stakeholders contribute to the process and have full agreement with the wording of the visions, objectives and strategies of the sector plan. The consultant will work closely with the Finance Sector Coordinator for this assignment.

5. Outputs

The consultant will be expected to produce the following outputs:

- i. Submission of an Inception Report detailing the approach to the assignment and a detailed timeframe for implementation within the first two weeks
- ii. Submission of an outline Finance Sector Plan with the main components based on the initial review and consultations within the first two months of the assignment
- iii. Submission of a first draft Finance Sector Plan three months from the start of the assignment including options for discussion. The Plan must include the institutional arrangements for the sector, a monitoring and evaluation plan with key performance indicators and a prioritized investment plan.
- iv. Submission of a final Finance Sector Plan after consultation and provision of three weeks for comments.

6. Administrative Arrangements

The consultant will work under the overall supervision of the Finance Sector Advisory Committee with day-to-day supervision from the Finance Sector Coordinator in MoF. Working space can be made available in MoF as required. The consultant will be responsible for their own office equipment, stationary and running costs. Any workshop costs will be financed separately from this contract

7. Timeframe

The Finance Sector Plan should be developed in the period between January 2011 and June 2011. It is estimated that 50 working days will be required to complete this contract. Note that this is an output based contract and the number of working days is an estimate only.

8. Expertise Required

An individual or team with the following profile is required:

- A degree in Economics, Public Management or equivalent
- Extensive experience in sector wide approaches
- Excellent writing and communications skills in Samoan and English
- Extensive experience in organizing participatory planning process
- Good understanding of the issues facing the Finance Sector in Samoa

Annex 2

Sample Format of Curriculum Vitae (CV)

Name: _____ (insert as appropriate)

Profession: ____ (insert as appropriate)

Date of Birth: _ (insert as appropriate)

Nationality: ____ (insert as appropriate)

Membership in Professional Societies: __ (insert as appropriate)

Key Qualifications:

(Give an outline of experience and training most pertinent to tasks on assignment. Describe degree of responsibility held on relevant previous assignments and give dates and locations. Use about half a page.)

Education: (Summarize college/university and other specialized education, giving names of institution, dates attended, and degrees obtained. Use about one quarter of a page.)

Employment Record: (Starting with present position, list in reverse order every employment held. List all positions held since graduation, giving dates, names of employing organizations, titles of positions held, and locations of assignments. For experience in last ten years, also give types of activities performed and client references, where appropriate. Use about two pages.)

Languages:

(For each language indicate proficiency: excellent, good, fair, or poor in speaking, reading, and writing.)

Names and contact details (phone and email) for 2 references.

Certification: I, the undersigned, certify that to the best of my knowledge and belief, these data correctly describe me, my qualifications, and my experience.

Signed: _____

Date: _____ (insert as appropriate)

Day/Month/Year

Note Alternative CV formats which include all the above information will be accepted

Annex 3
Financial Quotation
Cost Estimate of Services and Schedule of Rates

(1) Remuneration

<i>Name</i>	<i>Rate (Samoan Tala, as applicable)* (per working day)</i>	<i>Time spent (number of working days)</i>	<i>Total (Samoan Tala, applicable)*</i>
_____ (insert as appropriate)	_____ (insert number)	50	_____ (insert number)
VAGST			
Sub-Total (1)			

NOTE: The daily fee rate must be **inclusive of** medical insurance, provision of office equipment, support services etc, and VAGST/withholding tax payable in Samoa. The expert will be expected to provide his/her own laptop computer, office space and other necessary facilities. Separate funds will be available for workshops/participatory events. **Fees must be quoted in Samoan Tala.**

Signed:

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