



GOVERNMENT OF SAMOA

RECRUITMENT OF A TECHNICAL ADVISOR



The Government of Samoa (GoS) is seeking to recruit a Technical Advisor to provide technical support to the Ministry of Finance (MoF) and Samoa Trust Estates Corporation (STEC) under Phase II of the Public Finance Management Reform Programme.

The purpose of the assignment is to assist the MoF and STEC in conducting a study in order to review STEC's current operations and financial performance, its legal mandates and core functions and its organisational and governance structures. MoF and STEC also seek recommendations on necessary changes to enable STEC to make best use of its land assets so as to improve its financial performance in the short term as well as establishing STEC as a commercially viable and profitable enterprise in the medium to longer term.

Detailed Terms of Reference and information on the application procedure are available from the following web sites (ref: PFMR/2011/13): www.mof.gov.ws. The deadline for submission is 10:00am local Samoan time on Monday 9th January 2012. Applications must be submitted to: Secretary Tender's Board, 4th Floor, Central Bank Building, MoF, Apia, Samoa. For clarification or further information contact: Ms. Elita Tooala ó email: elita.tooala@mof.gov.ws Tel: +685 34321, or Patea Loli Malo Setefano ó email: patea@stec.ws Tel: +685 21515.



GOVERNMENT OF THE INDEPENDENT STATE OF SAMOA

MINISTRY OF FINANCE

**PROCUREMENT OF A TECHNICAL ADVISOR FOR THE
PUBLIC FINANCE MANAGEMENT REFORM PROGRAMME
PHASE 2**

REQUEST FOR QUOTATION

RFQ Reference: PFMR/2011/13

December 2011

Letter of Invitation

Dear Sir,

1. Request for Quotations

The MoF, hereinafter the Procuring Entity, intends to apply funds received through the Government of Samoa, Public Finance Management Reform Program Phase 2 for the recruitment of a Technical Advisor to provide technical support to MoF and STEC in conducting a study to review STEC's current operations and financial performance, its legal mandates and core functions and its organisational and governance structures. MoF and STEC also seek recommendations on necessary changes to enable STEC to make best use of its land assets so as to improve its financial performance in the short term as well as establishing STEC as a commercially viable and profitable enterprise in the medium to longer term.

2. Eligibility of Consultants.

The individual 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 (CV + Cost Estimate) for the services described in Annex 1 of this RFQ.

4. Curriculum Vitae

You are hereby invited to submit your 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.

6. Preparation and Submission of Quotations

Quotations must be delivered with one original and two copies. The 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 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, losing 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 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, namely VAGST and withholding tax. However, the Principal is responsible for forwarding the value of the tax charged by the Consultant on the Consultancy Fee direct to the Ministry of Revenue. This means that the value of the tax charged by the Consultant on the Consultancy Fee will not be included in payments made to the Consultant under the Contract. Withholding tax is not payable if the consultant is paying income tax in his country of residence. The Consultant must quote fee rates excluding any taxes payable in Samoa.

8. Evaluation Procedure

a) Evaluation of CVs

The Evaluation Committee shall evaluate the 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.

CVs will be evaluated in accordance to the following criteria:

Criteria	Maximum score
Qualifications	15
Relevant experience as a technical advisor, as required for this assignment	60
Experience in training and capacity building	15
Experience in developing countries and Pacific islands	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: $S = 75\% St + 25\% Sf$

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.

9. Date for Submission

You are requested to provide your quotation at the latest by **10:00am (local Samoan time) on Monday 9th January 2012.**

10. Validity of Quotation

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

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

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

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

13. If you require further information on the assignment and the local conditions, you may contact Elita Tooala at the following phone number and address: elita.tooala@mof.gov.ws Tel: +685 34321, SOE Monitoring Division, MoF, Level 7, CBS Building, Private Bag, Apia, Samoa **OR** Patea Loli Malo Setefano at the following phone number and address: patea@stec.ws Tel: +685 21515, STEC, Vaitele Tai, Samoa.

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

Yours sincerely,

Lavea Tupaimatuna Iulai Lavea
CHIEF EXECUTIVE OFFICER
MINISTRY OF FINANCE

Annex 1

TERMS OF REFERENCE

Phase 2 of the Public Finance Management Reform Plan

STEC Technical Advisor

1. Background

The Samoa Trust Estate Corporation (STEC), formerly Western Samoa Trust Estates Corporation (WSTEC), has been the largest enterprise in the country and a major contributor to Samoa's economy in the last 50 years. STEC has managed considerable areas of public land since becoming a public corporation in 1961. It has been responsible for commercial agriculture on its plantation land and for undertaking commercial enterprises (coconuts, cocoa, coffee, bananas, livestock etc). The overall objective of the Corporation is to carry out land development, agricultural management and related business activities that operate under private commercial principles on behalf of the Government. It is governed by the Western Samoa Trust Estates Corporation Act of 1977.

Today, STEC is only a shadow of its former self due to a number of restructuring activities such as the transfer of land holdings to the Samoa Land Corporation in 1990. This was primarily aimed at reducing STEC's indebtedness to the Government and to enable the privatisation of some of its operations. STEC now owns considerably less land, a skeleton workforce and has struggled to become profitable. STEC's land assets include about 6500 acres in Upolu and 7739 acres in Savai'i, a combined estimated market value of ST\$200 million. The Corporation has focused in the past ten years on coconuts harvesting and cattle farming with little to no investment in replanting or rehabilitation of its plantations leaving most of its land to lie idle. Approximately 600 acres of plantation land at its Mulifanua estate have been leased to private business operators and neighbouring communities as a deliberate strategy to generate cash flow for the Corporation.

There is now a renewed urgency to refocus attention on developing a medium term strategy to make the STEC a commercially viable and profitable enterprise. This strategy will be based primarily on leasing out land for the rehabilitation and the commercialisation of its plantations with strong emphasis on high value and niche type crops (cocoa, coffee, copra, taro of the export variety etc). Also it will focus on leasing out land for fruit trees for agro processing and value adding targeting both the export markets and import substitution. STEC will also review its existing strategy for cattle farming with the objective of managing a transition to leasing out appropriate cattle farming land whilst ensuring conformity with Government environment protection and water catchment rehabilitation policies. Implementing this strategy will necessitate a review of the Corporation's current legal mandate, core business, organisational and governance structure as well as the re-validation of its land assets following the enactment of the Western Samoa Trust Estates Corporation Reconstruction Act 1990. The strategy will need to be supported by a prioritised and costed work programme as well as an M & E framework to enable the Board and Government to monitor STEC's performance.

The current Management have been in place since January 2011. Based on STEC's experience in primary production and plantation management in the last two decades a Draft Development Strategy (DS) 2011 ó 2016 to guide STEC's development work and performance has been prepared for the next 5 years. The strategy is directly linked to the national policies on sustainable and economic development as per *Strategy for the*

Development of Samoa (SDS) 2008-2012. This draft strategy will need to be reviewed to take into account Government's policy to promote private sector development as the main engine for growth. STEC must review its inter-relationship with the private sector and its potential to support appropriate investment in commercial agriculture, whilst promoting sound sustainable land management and minimising negative environmental impacts. This approach would require close cooperation with the Environment Sector, the Water Sector and the Agriculture Sector. The aim would be to align STEC's development priorities and strategies with the recently approved Agriculture Sector Plan, 2011 to 2015, and other national strategies such as the Samoa Diagnostic Trade Integrated Study 2010 and the Fruit and Vegetable Strategy. This new direction will need to consider provision of land for commercial farming through long-term commercially based lease arrangements whilst moving away from direct development of land in agriculture.

To this effect, STEC is seeking technical assistance to review its current operations and financial performance, its legal mandates and core functions and its organisational and governance structures. Further, STEC seeks recommendations on necessary changes to enable the Corporation to make best use of its land assets so as to improve its financial performance in the short term as well as establishing STEC as a commercially viable and profitable enterprise in the medium to longer term.

2. PURPOSE

The main objectives of the TA are to:

- i. Reinvigorate or re-engineer STEC's operating performance and profitability.
- ii. Propose changes to the Act that clearly define the legal mandate and core functions of STEC as well as the confirmation of land assets under its ownership following the enactment of the Western Samoa Trust Estates Corporation Reconstruction Act 1990.
- iii. Reorganize or refocus STEC's organizational structure and governance framework to effectively support the implementation of the Corporation's commercial mandates and development strategies.
- iv. Refocus or re-engineer STEC operations to align with the development goal and strategies of the recently approved *Agriculture Sector Plan, 2011 – 2015, the Samoa Tourism Sector Plan, Samoa Trade Diagnostic Trade Study and the Fruit and Vegetable Strategy*. The re-engineering will also take into impacts on the *Water Sector and Environmental objectives of Government*.
- v. Re-position of STEC as a strategic partner to private sector investors in the agriculture, trade and tourism sectors focusing on the provision of land through long-term lease arrangements offered through transparent and competitive tendering. The ultimate objective will be to promote appropriate investment for production of high value adding crops, and niche type products in Samoa, whilst respecting environmental regulations and ensuring sustainable practices.

3. DETAILED TASKS

- i. The consultant(s) will make recommendations and review the key objectives and priority actions for implementation in STEC's Development Strategy 2011 to 2016

- and develop a prioritised and costed programme for reorientation of STEC's role away from direct engagement in commercial farming towards the provision of land through long-term lease arrangements to promote private sector investment in agriculture. The recommendations may be presented as a series of options for the restructuring of the organization and the transition towards a streamlined profitable entity.
- ii.* The consultant(s) will formulate a Plan of Sustainable Land Use for the Corporation's agriculture based developments taking into account Government environmental and water resource policies working in close consultation with MNRE. This will ensure the sustainable adaptation and management of land assets meet the commercial performance objectives. This will also contribute to the achievement of the strategic objectives of the Samoa Trade, Tourism and Agricultural Sector Plans, whilst contributing positively to the Water and Environmental Sector objectives.
 - iii.* The consultant(s) will review the current policy and terms of the leasing of 500 acres of STEC land at Mulifanua to private business owners. It will also make recommendations on changes to both the policy and lease terms to ensure these leases are in the best commercial interests of STEC. The consultant(s) will ensure that the purposes for the leases and standards of developments on these leaseholds are consistent with the development of facilities and services in and around this location as well as minimizing any environmental impacts. Such development should be complimentary to the needs of the International Airport as the main gateway to Samoa and the general development of the area as a quality resort/hotel and tourism related township.
 - iv.* The consultant(s) will review the organizational structure and governance framework of the Corporation and make recommendations on changes to enable the implementation of its development strategy and work programme over the next 5 years. This will include the development and strengthening of the management capacity of STEC and its systems in the areas of human resource management and development framework, performance management and records management to ensure STEC will be resourced with a cadre of versatile managerial and technical personnel to implement and deliver its core business and mandates.
 - v.* The TA will undertake a review of the Western Samoa Trust Estates Corporation Act 1977 which provides the legal governance framework for the Corporation. The TA will also review the Western Samoa Trust Estates Corporation Reconstruction Act 1990 and any other related legislation, which may affect the ownership of its land assets and future operations. Also it will make recommendations on feasible changes to enable the STEC Board to develop and invest these assets in improving operating performance and sustained profitability. This will also contribute to achieving the development outcomes sought by Government in the agriculture and trade sectors.

The above work will be undertaken through a participatory and consultative approach involving the private sector, the Farmers Association, the Chamber of Commerce, the Tourism Authority, the Hotels Association, the Ministry of Agriculture, MNRE (including the Water Sector Coordination Unit), and the SOE Monitoring Division, and UTOS amongst others. The proposed strategic plan will be presented for discussion at a public stakeholders forum including the key stakeholders identified above.

4. LOCATION AND TIMEFRAME

The consultant(s) will be based in Apia, Samoa, for a total period of 50 working days. The timing of the TA will be agreed in advance between the consultant(s), STEC CEO and CEO of the Ministry of Finance.

5. EXPERTS PROFILE

The consultant(s) must have extensive relevant experience in commercial land management, leasing arrangements, sustainable land management, sustainable agriculture development, and corporate governance. The consultant(s) is expected to have relevant degree with at least 10 years of relevant work experience. Experience in developing countries, and in Pacific Island countries, in particularly Samoa, is preferred. Must be fluent in English and have excellent writing skills.

REPORTS AND OUTPUTS

The consultants will be required to produce within the first 5 days an Inception Report (with a summary situational analysis and workplan), a 2nd progress report within 30 days of the duration of the assignment highlighting progress, options for the future development of STEC and issues that needs to be clarified. The Final Report will include a Strategic Plan for the future development of STEC with a detailed implementation plan against a timeframe. The Report will include a detailed financial analysis of STEC and a detailed business plan with a roadmap to profitability. The full findings and recommendations will be presented for consideration and implementation. Each visit should start and end with a briefing and debriefing session including details of the agreed future work programme and achievements to date.

ADMINISTRATIVE INFORMATION

The consultant(s) will work under the overall supervision of the CEO of STEC and CEO of MOF.

Reports are to be submitted to the CEO STEC and copy to CEO MOF

The consultants will be provided with the necessary office space and facilities as required. The consultant will be expected to provide his own computer for the study. Reports must be presented in 10 hard copies and with soft copies in word and PDF format.

6. PAYMENT PROCEDURE

Fees will be payable on approval of each agreed milestone report. The Final payment will be arranged after approval of the consultant's Final Report.

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

NOTE: The daily fee rate must be **inclusive of all costs**, medical insurance, etc, but excluding from VAGST/withholding tax payable in Samoa and return airfares for the expert for each mission foreseen within the contract. **The fee rates will be based on 5 working days per week.** A separate per diem will be paid for each night spent in Samoa. No fees or per diems will be paid for travel days. The expert will be expected to provide his own laptop computer. Separate funds will be available for training events. **Fees and per diem must be quoted in Samoan Tala or Australian Dollars**

(2) **Reimbursables**

	<i>Rate(Samoan Tala or AUD as applicable) for return flight</i>	<i>Number</i>	<i>Total (Samoan Tala, or AUD as applicable)</i>
(a) International Travel	_____ (insert number)	3 return flights	_____ (insert number)
Sub-total (2)			

TOTAL COST (Samoan Tala /AUD as applicable)* _____ (insert number)

* Currency applicable must be clearly indicated.

Signed:

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