



**GOVERNMENT OF SAMOA**  
**RECRUITMENT OF**  
**ORGANISATION PERFORMANCE**  
**ASSESSMENT EXPERT**



The Government of Samoa is seeking to recruit an Organisation Performance Assessment Expert to provide technical support to the Ministry of Finance under Phase I of the Public Finance Management Reform Programme with financial support from Public Sector Improvement Facility (AusAID and NZAID).

The purpose of the assignment is to assist the State Owned Enterprise Monitoring Division in developing and piloting an organization performance assessment tool to be implemented in collaboration with the respective SOE management.

Detailed Terms of Reference and information on the application procedure are available from the following web sites (ref: PFMR/2010/01): [www.mof.gov.ws](http://www.mof.gov.ws) and [www.samoapsif.gov.ws](http://www.samoapsif.gov.ws). The deadline for submission is 13.00 local Samoan time on Monday 23<sup>rd</sup> August 2010. Applications must be submitted to: Secretary Tender's Board, 4<sup>th</sup> Floor, Central Bank Building, Ministry of Finance, Apia, Samoa. For clarification or further information contact: Justina Sau–email: [justina.sau@mof.gov.ws](mailto:justina.sau@mof.gov.ws) Tel: +685 34321



**GOVERNMENT OF THE INDEPENDENT STATE OF SAMOA**

**MINISTRY OF FINANCE**

**PROCUREMENT OF ORGANISATION PERFORMANCE  
ASSESSMENT EXPERT FOR THE PUBLIC FINANCE  
MANAGEMENT REFORM PROGRAMME PHASE 1**

**REQUEST FOR QUOTATION**

**RFQ Reference: PFMR/2010/01**

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**July 2010**

## Letter of Invitation

Dear Sir,

### 1. Request for Quotations

The Ministry of Finance, hereinafter the Procuring Entity, intends to apply funds from the Public Sector Improved Facility for the Procurement of a Organisation Performance Assessment Expert to provide technical support for the implementation of the Public Finance Management Reform Plan Phase 1 in the Ministry of Finance.

### 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 “Cost Estimate of Services and Schedule of Rates”. **Please note that the maximum budget available for the fees component of this contract is 150,000 Samoan Tala (equivalent to 54,600 USD).**

### 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 RFP 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**

**4<sup>th</sup> Floor, Central Bank Building  
Ministry of Finance,  
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.

**7. 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:

<b>Criteria</b>	<b>Maximum score</b>
Qualifications	15
Relevant experience in experience in undertaking institutional performance assessments	40
Experience in change management of State Owned Enterprises or public Bodies	30
Experience in developing countries and Pacific islands	15
<b>TOTAL</b>	<b>100</b>

**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:

$S_f = 100 \times P_i / P_m$ , 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 75% and the financial quotation 25%. The global score is determined as follows:  $S = 75\% S_t + 25\% S_f$

Where:  
S is the global score  
S<sub>t</sub> is the score of the technical proposal  
S<sub>f</sub> 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 **1pm (local Samoan time) on Monday 23<sup>rd</sup> August 2010.**

**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 Justina Sau at the following phone number and address: [justina.sau@mof.gov.ws](mailto:justina.sau@mof.gov.ws) Tel: +685 34321, SOE Monitoring Division Division, Ministry of Finance, Level 3, CBS Building, Private Bag, Apia, Samoa.

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

Yours sincerely,

Tupaimatuna Iulai Lavea  
**CHIEF EXECUTIVE OFFICER**  
**MINISTRY OF FINANCE**

# **Annex 1**

## **TERMS OF REFERENCE**

### **Phase 1 of the Public Finance Management Reform Plan**

#### **Organisation Performance Assessment Expert**

##### **1. Background**

The Ministry of Finance in Samoa is seeking to recruit an Organisation Development expert as part of its Public Finance Management (PFM) Reform Plan. The initial phase of the PFM reform programme has focused on strengthening Government's financial management systems with limited consideration of the performance of State Owned Enterprises (SOEs). Two Public Expenditure and Financial Accountability (PEFA) assessment have been undertaken to monitor progress in strengthening PFM systems. However, these assessments have not included the financial management performance of State Owned Enterprises (SOE) or Public Trading Bodies and Public Beneficial Bodies, which have a critical impact on Government's performance in delivering services. The SOE Monitoring Division (SOEMD) in the Ministry of Finance has been established to monitor and assess the performance of Public Bodies. It was also mandated in 2001 to enforce the application of the Public Bodies (Performance and Accountability) Act 2001 and Regulations 2002. There have been concerns with regards to the performance of SOEs and their capacity to operate as commercial entities and generate revenue. There are currently 16 Public Trading Bodies, 8 Public Beneficial Bodies and 3 Public Mutual Bodies established in Samoa and monitored by SOEMD.

Technical support is being financed from the Public Sector Improvement Facility (with support from NZAID and AusAID) to provide a number of short and medium term experts to the Ministry of Finance for capacity building support and training for implementation of the first phase of the PFM Reform plan. The following experts have been providing technical and capacity building support in 2009/10:

- One Public Accounts expert for a period of 27 months (24 working months)
- One IT Accounts Software expert for 102 working days with intermittent visits
- One public sector Performance Monitoring expert for 120 working days with intermittent visits
- One Budgeting/Forward Estimates expert for 66 working days with intermittent visits
- One Debt management expert for 22 working days with 2 visits

##### **2. PURPOSE**

To assist the SOEMD in developing and piloting an organization performance assessment tool to be implemented in collaboration with the respective SOE management.

##### **3. DETAILED TASKS**

- i. Design a guideline and methodology for SOEMD to undertake organization performance assessments of Public Trading Bodies and Public Beneficial Bodies in Samoa. The guideline should be linked to the application of the methodology, which

should build on international experience in undertaking such assessments and must involve representatives of the organization concerned to ensure ownership of the results. The objective of the self-assessment exercise will be to motivate managers to take action on reforms or improvements where appropriate as well as provide a more indepth understanding of the performance of Public Bodies by SOEMD. The methodology should aim to focus on the core systems of the organization, particularly budgeting, planning and financial systems and governance that influence its outputs and performance. The methodology should aim to assess the business performance of the organisation and the quality of its customer services.

- ii. Once agreement has been reached on the methodology the consultant will assist SOEMD to pilot the organization self-assessments. The piloting will commence with training of SOEMD personnel as facilitators of the methodology. The consultant will provide on the job support and facilitation for the piloting exercise. The pilots will be conducted in one Public Trading Body, the Samoa Water Authority, and one Public Beneficial Body, the Samoa Sports Facilities Authority.
- iii. Assist SOEMD and the organization concerned in the preparation of a report on organization self-assessment undertaken with the main findings and identification of core systems, which need to be strengthened to impact on performance.
- iv. Make adjustments as necessary to the methodology based on the lessons learnt from the two pilot assessments.
- v. Prepare a final report detailing the guide to the methodology and providing a full toolkit for implementation of future organization performance self-assessments that can be applied in Samoa. The toolkit should include training powerpoint presentation, checklists, performance indicators and other tools for use as part of the performance assessment system.

## **1. METHODOLOGY**

During his first mission the expert will be required to develop a conceptual approach to undertake the organisation performance assessments based on a review of existing documentation and legislation relating to public bodies in Samoa. The consultant will develop an understanding of the institutional set up, core systems and challenges for the two public bodies, which will pilot the organisation performance assessment approach. Together with SOE counterpart staff initial consultation will be held with the senior managers of these organisations in order to obtain their support for the exercise. Other stakeholders will also be consulted including the responsible line-Ministry officials, members of the boards and key sector stakeholders, where appropriate. The consultant will then prepare a proposed methodology for undertaking the 2 pilot organisation self-assessments. The tool should be designed to be undertaken by the staff of the concerned organisation with support from the personnel of the SOEMD Division. It should aim to assess the performance of the core systems of the Public Body, which impact on the delivery of services. This should include a focus on financial systems and financial performance as well as forward planning, budgeting and performance monitoring. As far as possible the methodology should be based on objective rather than subjective criteria to measure performance.

Once the proposed methodology has been approved the consultant will return and assist the team to undertake the two pilot performance assessments. This will include formal training for

the core teams who will undertake the organisation performance assessment with participants from SOEMD and the pilot organisations.

During his final visit the consultant will assist the assessment teams with writing up the reports on the organisation performance assessments based on an agreed format including information of reforms underway and recommendations for future reform actions or improvements. The consultant will provide a final report detailing the methodology including adjustments based on lessons learned during the pilot assessments.

## **2. LOCATION AND TIMEFRAME**

The consultant will be based in Apia, Samoa, for a series of three inputs. The first inception mission will be approximately 3 weeks (15 working days) with a follow-up mission of approximately 4 weeks (20 working days) and a final mission of approximately 3 weeks (15 working days) bringing the total to 50 working days. The timing of each mission will be agreed in advance between the consultant and the ACEO, SOEMD. The work should be completed by 30<sup>th</sup> June 2011.

## **3. EXPERTS PROFILE**

An organisation development expert with experience in undertaking institutional performance assessments and SOE re-engineering. The consultant is expected to have a relevant degree to Masters level with 15 years of relevant work experience. Experience in the Pacific island nations would be preferred.

## **4. REPORTS AND OUTPUTS**

The consultant will be required to produce a report after each visit. Each visit should start and end with a briefing and debriefing session including details of the agreed future work programme and achievements to date. In addition the expert will be required to produce revisions to the detailed guide for undertaking Organisational performance assessments with a related toolkit of resources as part of his final report.

## **5. ADMINISTRATIVE INFORMATION**

The expert will work under the overall supervision of the Deputy CEO Policy with day-to-day supervision from the ACEO SOE Monitoring Division. The expert will also be required to work with the pilot organisations, the Manager of SWA and the Manager of the Sport facilities Authority.

Reports will be submitted to the Deputy CEO and the ACEO with copies to the members of the PFM Reform Task Force.

The consultant will be provided with the necessary office space and facilities as required. The expert is required to provide his own laptop computer.

## **6. PAYMENT PROCEDURE**

Fees and reimbursement of airfares will be payable after acceptance of the consultants final report for each mission.



## 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.)

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

**NOTE:** The daily fee rate must be **inclusive of all costs, per diem (both working and weekend days), accommodation, living expenses** 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.** The expert will be expected to provide his own laptop computer. Separate funds will be available for training events.

(2) **Reimbursables**

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

**TOTAL COST (Samoan Tala /USD as applicable)\*** \_\_\_\_\_ (insert number)

\* Currency applicable must be clearly indicated.

Signed:

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