



# **REQUEST FOR PROPOSALS**

**RFP# CI- 2020-02**

**SUPPLY OF CLIENT RELATIONSHIP MANAGEMENT (CRM) SOFTWARE**

March 10, 2020



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**Section I****LETTER OF INVITATION**

Dear Madam/Sir,

**Subject: SUPPLY OF CLIENT RELATIONSHIP MANAGEMENT SOFTWARE**

1. The Jamaica Promotions Corporation (JAMPRO) seeks to implement a new Client Relationship Management (CRM) system to address the challenges experienced with the organisation's existing CRM system. JAMPRO's existing CRM system does not fully address all the needs of its various departments and as a result it hampers the ability of the departments to meet their deliverables on a timely basis. The overall objective is to implement a new CRM system based on detailed business requirements which will improve the sales and promotions process.
2. JAMPRO, through this RFP# CI- 2020-02, is now seeking to contract the services of a firm to identify and supply the software that is consistent with the needs of the organisation.
3. You are invited to submit your proposal for this in accordance with the requirements outlined in **Section V- Terms of Reference**.
4. The evaluation criteria, which will be used, is designed to ensure that the service provider selected is the bidder who submits the most advantageous proposal taking into account the criteria outlined in **Section V – Business Requirements**.
5. Your proposal should be accompanied by:
  - a. A copy of a valid Tax Compliance Certificate (TCC) or Tax Compliance Letter (TCL) for local bidders. At the time of the contract award, overseas bidder shall present to the Procuring Entity, a valid Tax Compliance Certificate.
  - b. National Contracts Commission (NCC) Certificate for local bidders. Foreign bidders shall register with the NCC prior to the contract being awarded.
6. A Consultant will be selected under quality-cost procedures described in this RFP, in accordance with the Government of Jamaica Handbook of Public Sector Procurement Procedures which can be found at the following website: [www.mof.gov.jm](http://www.mof.gov.jm).
7. Please inform us in writing at the following address upon receipt – [procurement@jamprocorp.com](mailto:procurement@jamprocorp.com) whether you will submit a proposal alone or in association.

Sincerely,

Gabriel Heron  
**Vice President – Marketing**



## Section II

### INSTRUCTIONS TO CONSULTANT

#### Definitions

“Procuring Entity” means the agency with which the selected Consultant signs the Contract for the Services.

“Consultant” means any entity or person that may provide or provides the Services to the Procuring Entity under the Contract.

“Contract” means the Contract signed by the Parties and all the attached documents listed in its Clause 1, that is the General Conditions (GC), the Special Conditions (SC), and the Appendices.

“Data Sheet” means such part of the Instructions to Consultants used to reflect specific country and assignment conditions.

“Day” means calendar day.

“Government” means the Government of Jamaica

“Instructions to Consultants” (Section 2 of the RFP) means the document which provides short-listed Consultants with all information needed to prepare their Proposals.

“LOI” (Section 1 of the RFP) means the Letter of Invitation being sent by the Procuring Entity to the short-listed Consultants.

“Personnel” means professionals and support staff provided by the Consultant or by any Sub-Consultant and assigned to perform the Services or any part thereof; “Foreign Personnel” means such professionals and support staff who at the time of being so provided had their domicile outside the Government’s country; “Local Personnel” means such professionals and support staff who at the time of being so provided had their domicile inside the Government’s country.

“Proposal” means the Technical Proposal and the Financial Proposal.



“RFP” means the Request for Proposal to be prepared by the Procuring Entity for the selection of Consultants, based on the SRFP.

“SRFP” means the Standard Request for Proposals, which must be used by the Procuring Entity as a guide for the preparation of the RFP.

“Services” means the work to be performed by the Consultant pursuant to the Contract.

“Sub-Consultant” means any person or entity to whom the Consultant subcontracts any part of the Services.

(p) “Terms of Reference” (TOR) means the document included in the RFP as Section 5 which explains the objectives, scope of work, activities, tasks to be performed, respective responsibilities of the Procuring Entity and the Consultant, and expected results and deliverables of the assignment.

## **1. Introduction**

1.1 The Procuring Entity named in the Data Sheet will select a consulting firm/organization (the Consultant) from those listed in the Letter of Invitation, in accordance with the method of selection specified in the Data Sheet.

1.2 The shortlisted Consultants are invited to submit a Technical Proposal and a Financial Proposal, or a Technical Proposal only, as specified in the Data Sheet, for consulting services required for the assignment named in the Data Sheet. The Proposal will be the basis for contract negotiations and ultimately for a signed Contract with the selected Consultant.

1.3 Consultants should familiarize themselves with local conditions and take them into account in preparing their Proposals. To obtain first-hand information on the assignment and local conditions, Consultants are encouraged to attend the pre-proposal conference if one is specified in the Data Sheet. Attending the pre-proposal conference is optional. Consultants should contact the Procuring Entity’s representative named in the Data Sheet to arrange for their visit or to obtain additional information on the pre-proposal conference. Consultants should ensure that these officials are

advised of the visit in adequate time to allow them to make appropriate arrangements.

- 1.4 The Procuring Entity will timely provide at no cost to the Consultants the inputs and facilities specified in the Data Sheet, assist the firm in obtaining licenses and permits needed to carry out the services, and make available relevant project data and reports.
- 1.5 Consultants shall bear all costs associated with the preparation and submission of their proposals and contract negotiation. The Procuring Entity is not bound to accept any proposal and reserves the right to annul the selection process at any time prior to Contract award, without thereby incurring any liability to the Consultants.

*N.B. GOJ reserves the right not to award a contract to any party with whom we are currently in litigation or in the past engaged in litigation.*

**Conflict of Interest**

- 1.6 GOJ policy requires that Consultants provide professional, objective, and impartial advice and at all times hold the Procuring Entity's interests paramount, strictly avoid conflicts with other assignments or their own corporate interests and act without any consideration for future work.

1.6.1 Without limitation on the generality of the foregoing, Consultants, and any of their affiliates, shall be considered to have a conflict of interest and shall not be recruited, under any of the circumstances set forth below:

**Conflicting activities**

- (i) A firm that has been engaged by the Procuring Entity to provide goods, works or services other than consulting services for a project, and any of its affiliates, shall be disqualified from providing consulting services related to those goods, works or services. Conversely, a firm hired to provide consulting services for the preparation or implementation of a project, and any of its affiliates, shall be disqualified from subsequently providing goods or works or services other than consulting services resulting from or directly related to the firm's consulting



services for such preparation or implementation. For the purpose of this paragraph, services other than consulting services are defined as those leading to a measurable physical output, for example surveys, exploratory drilling, aerial photography, and satellite imagery.

**Conflicting assignments**

- (ii) A Consultant (including its Personnel and Sub-Consultants) or any of its affiliates shall not be hired for any assignment that, by its nature, may be in conflict with another assignment of the Consultant to be executed for the same or for another Procuring Entity. For example, a Consultant hired to prepare engineering design for an infrastructure project shall not be engaged to prepare an independent environmental assessment for the same project, and a Consultant assisting a Procuring Entity in the privatization of public assets shall not purchase, nor advise Procuring Entities of, such assets. Similarly, a Consultant hired to prepare Terms of Reference for an assignment should not be hired for the assignment in question.

**Conflicting relationships**

- (iii) A Consultant (including its Personnel and Sub-Consultants) that has a business or family relationship with a member of the Procuring Entity's staff who is directly or indirectly involved in any part of (i) the preparation of the Terms of Reference of the assignment, (ii) the selection process for such assignment, or (iii) supervision of the Contract, may not be awarded a Contract, unless the conflict stemming from this relationship has been resolved in a manner acceptable to the GOJ throughout the selection process and the execution of the Contract.

1.6.2 Consultants have an obligation to disclose any situation of actual or potential conflict that impacts their capacity to serve the best interest of their Procuring Entity, or that may reasonably



be perceived as having this effect. Failure to disclose said situations may lead to the disqualification of the Consultant or the termination of its Contract.

1.6.3 No agency or current employees of the Procuring Entity shall work as Consultants under their own Ministries, Departments or Agencies. Recruiting former government employees of the Procuring Entity to work for their former Ministries, Departments or Agencies is acceptable provided no conflict of interest exists. When the Consultant nominates any government employee as Personnel in their technical proposal, such Personnel must have written certification from their government or employer confirming that they are on leave without pay from their official position and allowed to work full-time outside of their previous official position. Such certification shall be provided to the Procuring Entity by the Consultant as part of his technical proposal.

**Unfair Advantage**

1.6.4 If a shortlisted Consultant could derive a competitive advantage from having provided consulting services related to the assignment in question, the Procuring Entity shall make available to all shortlisted Consultants together with this RFP all information that would in that respect give such Consultant any competitive advantage over competing Consultants.

**Fraud and Corruption**

1.7 The Government of Jamaica requires that Bidders, Suppliers, Contractors, and Consultants, observe the highest standard of ethics during the procurement and execution of such contracts. In pursuit of this policy, GOJ:

defines, for the purposes of this provision, the terms set forth below as follows:

“corrupt practice” means the offering, giving, receiving, or soliciting, directly or indirectly, of anything of value to influence the action of a public official in the procurement process or in contract execution;





“fraudulent practice” means a misrepresentation or omission of facts in order to influence a procurement process or the execution of a contract, to the detriment of Government of Jamaica and includes collusive practice among bidders (prior to or after bid submission) designed to establish bid prices at artificial non-competitive levels and to deprive Government of the benefits of free and open competition;

“collusive practice” means a scheme or arrangement between two or more bidders, with or without the knowledge of the Procuring Entity, designed to establish bid prices at artificial non-competitive levels or to influence the action of any party in the procurement process or the execution of a contract; and

“coercive practice” means harming or threatening to harm, directly or indirectly, persons or their property to influence their participation in the procurement process or affect the execution of a contract;

will reject a proposal for award if it determines that the Bidder recommended for award has, directly or through an agent, engaged in corrupt, fraudulent, collusive or coercive practices in competing for the Contract in question;

will sanction a firm or individual, including declaring them ineligible, either indefinitely or for a stated period of time, to be awarded a GOJ-financed contract if it at any time determines that they have, directly or through an agent, engaged, in corrupt, fraudulent, collusive or coercive practices in competing for, or in executing, a GOJ-financed contract; and

will have the right to require that a provision be included in Bidding Documents and in contracts financed by GOJ, requiring bidders, suppliers, contractors and consultants to permit GOJ to inspect their accounts and records and other documents relating to the Bid submission and contract performance and to have them audited by auditors appointed by the GOJ.

- 1.8 Consultants shall furnish information on commissions and gratuities, if any, paid or to be paid to agents relating to this proposal and during execution of the assignment if the Consultant is awarded the Contract, as requested in the Financial Proposal submission form (Section 4).
- Origin of Goods and Consulting Services**
- 1.10 Goods supplied and Consulting Services provided under the Contract may originate from any country except where:
- the procurement is covered under a Free Trade Agreement
  - a multilateral funding agency policy which limits the origin.
  - the procurement is limited to local consultants
- Only one Proposal**
- 1.11 Shortlisted Consultants may only submit one proposal. If a Consultant submits or participates in more than one proposal, such proposals shall be disqualified. However, this does not limit the participation of the same Sub-Consultant, including individual experts, to more than one proposal.
- Proposal Validity**
- 1.12 The Data Sheet indicates how long Consultants' Proposals must remain valid after the submission date. During this period, Consultants shall maintain the availability of Professional staff nominated in the Proposal. The Procuring Entity will make its best effort to complete negotiations within this period. Should the need arise however, the Procuring Entity may request Consultants to extend the validity period of their proposals. Consultants who agree to such extension shall confirm that they maintain the availability of the Professional staff nominated in the Proposal, or in their confirmation of extension of validity of the Proposal, Consultants could submit new staff in replacement, who would be considered in the final evaluation for contract award. Consultants who do not agree have the right to refuse to extend the validity of their Proposals.
- 2. Clarification and Amendment of RFP Documents**
- 2.1 Consultants may request a clarification of any of the RFP documents up to the number of days indicated in the Data Sheet before the proposal submission date. Any request for clarification must be sent in writing, or by standard electronic means to the Procuring Entity's



address indicated in the Data Sheet. The Procuring Entity will respond in writing, or by standard electronic means and will send written copies of the response (including an explanation of the query but without identifying the source of inquiry) to all Consultants. Should the Procuring Entity deem it necessary to amend the RFP as a result of a clarification, it shall do so following the procedure under para. 2.2.

- 2.2 At any time before the submission of Proposals, the Procuring Entity may amend the RFP by issuing an addendum in writing or by standard electronic means. The addendum shall be sent to all Consultants and will be binding on them. Consultants shall acknowledge receipt of all amendments. To give Consultants reasonable time in which to take an amendment into account in their Proposals the Procuring Entity may, if the amendment is substantial, extend the deadline for the submission of Proposals.

**3. Preparation of Proposals**

- 3.1 The Proposal (see para. 1.2), as well as all related correspondence exchanged by the Consultants and the Procuring Entity, shall be written in the language (s) specified in the Data Sheet.
- 3.2 In preparing their Proposal, Consultants are expected to examine in detail the documents comprising the RFP. Material deficiencies in providing the information requested may result in rejection of a Proposal.
- 3.3 While preparing the Technical Proposal, Consultants must give particular attention to the following:
- (a) If a shortlisted Consultant considers that it may enhance its expertise for the assignment by associating with other Consultants in a joint venture or sub-consultancy, it may associate with either (a) non-shortlisted Consultant(s), or (b) shortlisted Consultants if so indicated in the Data Sheet. A shortlisted Consultant must first obtain the approval of the Procuring Entity if it wishes to enter into a joint venture with non-shortlisted or shortlisted Consultant(s). In case of association with non-shortlisted Consultant(s), the shortlisted Consultant shall act as association leader. In case of a joint venture, all partners shall be jointly and severally liable and shall

indicate who will act as the leader of the joint venture.

- (b) The estimated number of Professional staff-months or the budget for executing the assignment shall be shown in the Data Sheet, but not both. However, the Proposal shall be based on the number of Professional staff-months or budget estimated by the Consultants.

For fixed-budget-based assignments, the available budget is given in the Data Sheet, and the Financial Proposal shall not exceed this budget, while the estimated number of Professional staff-months shall not be disclosed.

- (c) Alternative professional staff shall not be proposed, and only one curriculum vitae (CV) may be submitted for each position.

**Language**

- (d) Documents to be issued by the Consultants as part of this assignment must be in the language(s) specified in the Reference Paragraph 3.1 of the Data Sheet. If Reference Paragraph 3.1 indicates two languages, the language in which the proposal of the successful Consultant will be submitted shall govern for the purpose of interpretation. It is desirable that the firm's Personnel have a working knowledge of the Procuring Entity's national language.

**Technical Proposal Format and Content**

- 3.4 Depending on the nature of the assignment, Consultants are required to submit a Full Technical Proposal (FTP), or a Simplified Technical Proposal (STP). The Data Sheet indicates the format of the Technical Proposal to be submitted. Submission of the wrong type of Technical Proposal will result in the Proposal being deemed non-responsive. The Technical Proposal shall provide the information indicated in the following paragraphs from (a) to (g) using the attached Standard Forms (Section 3). Paragraph (c) (ii) indicates the recommended number of pages for the description of the approach, methodology and work plan of the STP. A page is considered to be one printed side of A4 or letter size paper.

- (a) (i) For the FTP only: a brief description of the Consultants' organization and an outline of recent experience of the Consultants and, in



the case of joint venture, for each partner, on assignments of a similar nature is required in Form TECH-2 of Section 3. For each assignment, the outline should indicate the names of Sub-Consultants/ Professional staff, duration of the assignment, contract amount, and Consultant's involvement. Information should be provided only for those assignments for which the Consultant was legally contracted by the Procuring Entity as a corporation or as one of the major firms within a joint venture. Assignments completed by individual Professional staff working privately or through other consulting firms cannot be claimed as the experience of the Consultant, or that of the Consultant's associates, but can be claimed by the Professional staff themselves in their CVs. Consultants should be prepared to substantiate the claimed experience if so requested by the Procuring Entity.

- (ii) For the STP the above information is not required and Form TECH-2 of Section 3 shall not be used.
- (b) (i) For the FTP only: comments and suggestions on the Terms of Reference including workable suggestions that could improve the quality/ effectiveness of the assignment; and on requirements for counterpart staff and facilities including: administrative support, office space, local transportation, equipment, data, etc. to be provided by the Procuring Entity (Form TECH-3 of Section 3).
- (ii) For the STP Form TECH-3 of Section 3 shall not be used; the above comments and suggestions, if any, should be incorporated into the description of the approach and methodology (refer to following sub-para. 3.4 (c) (ii)).
- (c) (i) For the FTP, and STP: a description of the approach, methodology and work plan for performing the assignment covering the following subjects: technical approach and methodology, work plan, and organization and



staffing schedule. Guidance on the content of this section of the Technical Proposals is provided under Form TECH-4 of Section 3. The work plan should be consistent with the Work Schedule (Form TECH-8 of Section 3) which will show in the form of a bar chart the timing proposed for each activity.

(ii) For the STP only: the description of the approach, methodology and work plan should normally consist of 10 pages, including charts, diagrams, and comments and suggestions, if any, on Terms of Reference and counterpart staff and facilities.

(d) The list of the proposed Professional staff team by area of expertise, the position that would be assigned to each staff team member, and their tasks (Form TECH-5 of Section 3).

(e) Estimates of the staff input (staff-months of foreign and local professionals) needed to carry out the assignment (Form TECH-7 of Section 3). The staff-months input should be indicated separately for home office and field activities, and for foreign and local Professional staff.

(f) CVs of the Professional staff signed by the staff themselves or by the authorized representative of the Professional Staff (Form TECH-6 of Section 3).

(g) For the FTP only: a detailed description of the proposed methodology and staffing for training, if the Data Sheet specifies training as a specific component of the assignment.

3.5 The Technical Proposal shall not include any financial information. A Technical Proposal containing financial information may be declared nonresponsive.

**Financial Proposals**

3.6 The Financial Proposal shall be prepared using the attached Standard Forms (Section 4). It shall list all costs associated with the assignment, including (a) remuneration for staff (foreign and local, in the field and at the Consultants' home office), and (b) reimbursable expenses indicated in the Data Sheet. If appropriate, these costs should be broken down by activity and, if appropriate, into foreign and local

expenditures. All activities and items described in the Technical Proposal must be priced separately; activities and items described in the Technical Proposal but not priced, shall be assumed to be included in the prices of other activities or items.

**Taxes**

- 3.7 The Consultant may be subject to local taxes (such as: value added or sales tax, social charges or income taxes on nonresident Foreign Personnel, duties, fees, levies) on amounts payable by the Procuring Entity under the Contract. The Procuring Entity will state in the Data Sheet if the Consultant is subject to payment of any local taxes. Any such amounts shall not be included in the Financial Proposal as they will not be evaluated, but they will be discussed at contract negotiations, and applicable amounts will be included in the Contract.

In accordance with the Government of Jamaica Handbook of Public Sector Procurement Procedures November, 2008 (<http://www.mof.gov.jm>) the Bidder shall have to demonstrate that they have paid such taxes, duties, fees and other impositions as may be levied in Jamaica.

- 3.8 Consultants may express the price of their services in a maximum of three freely convertible currencies, singly or in combination. The Procuring Entity may require Consultants to state the portion of their price representing local cost in the national currency if so indicated in the Data Sheet.
- 3.9 Commissions and gratuities, if any, paid or to be paid by Consultants and related to the assignment will be listed in the Financial Proposal Form FIN-1 of Section 4.

**4. Submission, Receipt, and Opening of Proposals**

- 4.1 The original proposal (Technical Proposal and, if required, Financial Proposal; see para. 1.2) shall contain no interlineations or overwriting, except as necessary to correct errors made by the Consultants themselves. The person who signed the proposal must initial such corrections. Submission letters for both Technical and Financial Proposals should respectively be in the format of TECH-1 of Section 3, and FIN-1 of Section 4.
- 4.2 An authorized representative of the Consultants shall initial all pages of the original Technical and Financial Proposals. The authorization shall be in the form of a written power of attorney accompanying the Proposal or in any other form demonstrating that the representative



has been duly authorized to sign. The signed Technical and Financial Proposals shall be marked “ORIGINAL”.

- 4.3 The Technical Proposal shall be marked “ORIGINAL” or “COPY” as appropriate. The Technical Proposals shall be deposited in the TENDER BOX provided at the address referred to in para. 4.5 and in the number of copies indicated in the Data Sheet. All required copies of the Technical Proposal are to be made from the original. If there are discrepancies between the original and the copies of the Technical Proposal, the original governs.
- 4.4 The original and all copies of the Technical Proposal shall be placed in a sealed envelope clearly marked “TECHNICAL PROPOSAL” Similarly, the original Financial Proposal (if required under the selection method indicated in the Data Sheet) shall be placed in a sealed envelope clearly marked “FINANCIAL PROPOSAL” followed by the name of the assignment, and with a warning “**DO NOT OPEN WITH THE TECHNICAL PROPOSAL.**” The envelopes containing the Technical and Financial Proposals shall be placed into an outer envelope and sealed. This outer envelope shall bear the submission address, reference number and title, and be clearly marked “**DO NOT OPEN, EXCEPT IN PRESENCE OF THE OFFICIAL APPOINTED, BEFORE [insert the time and date of the submission deadline indicated in the Data Sheet]**”. 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 be case for Proposal rejection. If the Financial Proposal is not submitted in a separate sealed envelope duly marked as indicated above, this will constitute grounds for declaring the Proposal non-responsive.
- 4.5 The Proposals must be sent to the address indicated in the Data Sheet and received by the Procuring Entity no later than the time and the date indicated in the Data Sheet, or any extension to this date in accordance with para. 2.2. Any proposal received by the Procuring Entity after the deadline for submission shall be returned unopened.
- 4.6 The Procuring Entity shall open the Technical Proposal immediately after the deadline for their submission. The envelopes with the Financial Proposal shall remain sealed and securely stored.



- 5. Proposal Evaluation**
- 5.1 From the time the Proposals are opened to the time the Contract is awarded, the Consultants should not contact the Procuring Entity on any matter related to its Technical and/or Financial Proposal. Any effort by Consultants to influence the Procuring Entity in the examination, evaluation, ranking of Proposals, and recommendation for award of Contract may result in the rejection of the Consultants' Proposal.
- Evaluators of Technical Proposals shall have no access to the Financial Proposals until the technical evaluation is concluded.
- Evaluation of Technical Proposals**
- 5.2 The evaluation committee shall evaluate the Technical Proposals on the basis of their responsiveness to the Terms of Reference, applying the evaluation criteria, sub-criteria, and point system specified in the Data Sheet. Each responsive Proposal will be given a technical score (St). A Proposal shall be rejected at this stage if it does not respond to important aspects of the RFP, and particularly the Terms of Reference or if it fails to achieve the minimum technical score indicated in the Data Sheet.
- Financial Proposals for QBS**
- 5.3 Following the ranking of technical Proposals, when selection is based on quality only (QBS), the first ranked Consultant is invited to negotiate its proposal and the Contract in accordance with the instructions given under para. 6 of these Instructions.
- Public Opening and Evaluation of Financial Proposals (only for QCBS, FBS, and LCS)**
- 5.4 After the technical evaluation is completed the Procuring Entity shall notify those Consultants whose Proposals did not meet the minimum qualifying mark or were considered non-responsive to the RFP and TOR, that their Financial Proposals will be returned unopened after completing the selection process. Where possible the financial proposals should be opened publicly. In this case, the Procuring Entity shall simultaneously notify in writing Consultants that have secured the minimum qualifying mark, of the date, time and location for opening of the Financial Proposals. The opening date should allow Consultants sufficient time to make arrangements for attending the opening. Consultants' attendance at the opening of Financial Proposals is optional.
- 5.5 Financial Proposals shall be opened publicly in the presence of the Consultants' representatives who



choose to attend. The name of the Consultants, and the technical scores of the Consultants shall be read aloud. The Financial Proposal of the Consultants who met the minimum qualifying mark will then be inspected to confirm that they have remained sealed and unopened. These Financial Proposals shall be then opened, and the total prices read aloud and recorded. Copy of the record shall be sent to all Consultants.

- 5.6 The Evaluation Committee will correct any computational errors. When correcting computational errors, in case of discrepancy between a partial amount and the total amount, or between word and figures the formers will prevail. In addition to the above corrections, as indicated under para. 3.6, activities and items described in the Technical Proposal but not priced, shall be assumed to be included in the prices of other activities or items. In case an activity or line item is quantified in the Financial Proposal differently from the Technical Proposal, (i) if the Time-Based form of contract has been included in the RFP, the Evaluation Committee shall correct the quantification indicated in the Financial Proposal so as to make it consistent with that indicated in the Technical Proposal, apply the relevant unit price included in the Financial Proposal to the corrected quantity and correct the total Proposal cost, (ii) if the Lump-Sum form of contract has been included in the RFP, no corrections are applied to the Financial Proposal in this respect. Prices shall be converted to a single currency using the selling rates of exchange, source and date indicated in the Data Sheet.
- 5.7 In case of QCBS, the lowest evaluated Financial Proposal (Fm) will be given the maximum financial score (Sf) of 30 points. The financial scores (Sf) of the other Financial Proposals will be computed as indicated in the Data Sheet. Proposals will be ranked according to their combined technical (St) and financial (Sf) scores.
- 5.8 In the case of Fixed-Budget Selection, the Procuring Entity will select the firm that submitted the highest ranked Technical Proposal within the budget. Proposals that exceed the indicated budget will be rejected. In the case of the Least-Cost Selection, the Procuring Entity will select the lowest proposal among those that passed the minimum technical score. In both cases the evaluated proposal price according to para. 5.6 shall be

considered, and the selected firm is invited for negotiations.

- 6. Negotiations**
- 6.1** Negotiations will be held at the date and address indicated in the Data Sheet. The invited Consultant will, as a pre-requisite for attendance at the negotiations, confirm availability of all Professional staff. Failure in satisfying such requirements may result in the Procuring Entity proceeding to negotiate with the next-ranked Consultant. Representatives conducting negotiations on behalf of the Consultant must have written authority to negotiate and conclude a Contract.
- Technical negotiations**
- 6.2** Negotiations will include a discussion of the Technical Proposal, the proposed technical approach and methodology, work plan, and organization and staffing, and any suggestions made by the Consultant to improve the Terms of Reference. The Procuring Entity and the Consultants will finalize the Terms of Reference, staffing schedule, work schedule, logistics, and reporting. These documents will then be incorporated in the Contract as “Description of Services”. Special attention will be paid to clearly defining the inputs and facilities required from the Procuring Entity to ensure satisfactory implementation of the assignment. The Procuring Entity shall prepare minutes of negotiations which will be signed by the Procuring Entity and the Consultant.
- Financial negotiations**
- 6.3** If applicable, it is the responsibility of the Consultant, before starting financial negotiations, to contact the local tax authorities to determine the local tax amount to be paid by the Consultant under the Contract. The financial negotiations will include a clarification (if any) of the firm’s tax liability in the Procuring Entity’s country, and the manner in which it will be reflected in the Contract; and will reflect the agreed technical modifications in the cost of the services. In the cases of QCBS, Fixed-Budget Selection, and the Least-Cost Selection methods, unless there are exceptional reasons, the financial negotiations will involve neither the remuneration rates for staff nor other proposed unit rates. For other methods, Consultants will provide the Procuring Entity with the information on remuneration rates described in the Appendix attached to Section 4 - Financial Proposal - Standard Forms of this RFP.

- Availability of Professional staff/experts**      6.4      Having selected the Consultant on the basis of, among other things, an evaluation of proposed Professional staff, the Procuring Entity expects to negotiate a Contract on the basis of the Professional staff named in the Proposal. Before contract negotiations, the Procuring Entity will require assurances that the Professional staff will be actually available. The Procuring Entity will not consider substitutions during contract negotiations unless both parties agree that undue delay in the selection process makes such substitution unavoidable or for reasons such as death or medical incapacity. If this is not the case and if it is established that Professional staff were offered in the proposal without confirming their availability, the Consultant may be disqualified. Any proposed substitute shall have equivalent or better qualifications and experience than the original candidate and be submitted by the Consultant within the period of time specified in the letter of invitation to negotiate.
- Conclusion of the negotiations**      6.5      Negotiations will conclude with a review of the draft Contract. To complete negotiations the Procuring Entity and the Consultant will initial the agreed Contract. If negotiations fail, the Procuring Entity will invite the Consultant whose Proposal received the second highest score to negotiate a Contract.
- 7. Award of Contract**
- 7.1      After completing negotiations the Procuring Entity shall award the Contract to the selected Consultant and publish notice of the award on its website or the respective MDB website in the case of multilaterally funded contracts. The Procuring Entity shall promptly notify all Consultants who have submitted proposals. After Contract signature, the Procuring Entity shall return the unopened Financial Proposals to the unsuccessful Consultants.
- 7.2      The Consultant is expected to commence the assignment on the date and at the location specified in the Data Sheet.
- 8. Confidentiality**      8.1      Information relating to evaluation of Proposals and recommendations concerning awards shall not be disclosed to the Consultants who submitted the Proposals or to other persons not officially concerned with the process, until the publication of the award of Contract. The undue use by any Consultant of



confidential information related to the process may result in the rejection of its Proposal.



DATA SHEET

Paragraph Reference	
1.1	Name of the Procuring Entity: <b><u>Jamaica Promotions Corporation</u></b>  Method of selection: <b>Quality-Cost Based Selection (QCBS)</b>
1.2	Financial Proposal to be submitted together with Technical Proposal: Yes X__ No __  Name of the assignment is: <b><u>RFP#: CI-2020-02 - SUPPLY OF CRM SOFTWARE</u></b>
1.3	A pre-proposal conference will be held: Yes No <u>X</u>
1.4	The Procuring Entity will provide the following inputs and facilities: <ul style="list-style-type: none"> <li>• Desired Business Requirements for the CRM software</li> </ul> Reimbursable expenses are not accounted for in this project and such costs should be included in project cost proposed in the financial proposal.
1.5	Consultants shall bear all costs associated with the preparation and submission of their proposals and contract negotiation. The Procuring Entity is not bound to accept any proposal, and reserves the right to annul the selection process at any time prior to Contract award, without thereby incurring any liability to the Consultants.
1.12	Proposals must remain valid <u>120</u> days after the submission date.

2.1	Clarifications may be requested in writing not later than THREE (3) working days before the submission date. Telephone calls will not be facilitated. Any request for clarification must be sent in writing, or by standard electronic means to the Procuring Entity’s address indicated below. The Procuring Entity will respond in writing, or by standard electronic means and will send written copies of the response (including an explanation of the query but without identifying the source of inquiry) to all Bidders.
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	The address for requesting clarifications is: Jodi-Ann Jackson Jamaica Promotions Corporation (JAMPRO) 18 Trafalgar Road, Kingston 10 E-mail: <a href="mailto:jjackson@jamprocorp.com">jjackson@jamprocorp.com</a>
2.2	At any time before the submission of Proposals, the Procuring Entity may amend the RFP by issuing an addendum in writing or by standard electronic means. The addendum shall be sent to all Consultants and will be binding on them. Consultants shall acknowledge receipt of all amendments. To give Consultants reasonable time in which to take an amendment into account in their Proposals the Procuring Entity may, if the amendment is substantial, extend the deadline for the submission of Proposals.
3.1	Proposals shall be submitted in the following language: English
3.3 (a)	Consultants may associate with other Consultants: Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
3.3 (b)	The estimated number of professional staff months for the activity: <u>Seven (7) months</u>  It should be noted that there is a budget allocation of JA\$10 million for this activity, including any cost for activities outside the scope of the Terms of Reference below, but deemed necessary to complete the project.
3.4	The format of the Technical Proposal to be submitted is: FTP <input type="checkbox"/> or STP <input checked="" type="checkbox"/> The following forms must be used: <ul style="list-style-type: none"> <li>• TECH 1: Proposal Submission Form</li> <li>• TECH 4: Description of the Approach, Methodology and Work Plan for Performing the Assignment</li> <li>• TECH 5: Team Composition and Task Assignments</li> <li>• TECH 6: Curriculum Vitae (CV) for Proposed Professional Staff</li> <li>• TECH 8: Work Schedule</li> <li>• TECH 9: Client Referral Form</li> </ul>
3.4 (g)	Training is a specific component of this assignment: Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
3.5	Technical proposals should not include financial information, however, it should include a copy of the Tax Compliance Certificate/Tax Compliance Letter, as well as the National Contract Certificate (NCC) for local bidders.



	At the time of the contract award, overseas bidder shall present to the Procuring Entity, a valid Tax Compliance Certificate and shall register with the NCC prior to the contract being awarded. A Technical Proposal containing financial information may be declared non-responsive.
3.6	Financial proposals should include the relevant forms: <ul style="list-style-type: none"> <li>• FIN-1 Financial Proposal Submission Form</li> <li>• FIN-2 Summary of Costs</li> <li>• FIN-3 Breakdown of Costs by Activity</li> </ul>
3.7	Amounts payable by the Procuring Entity to the Consultant under the contract to be subject to local taxation: Yes <u>X</u> No__  If affirmative, the Procuring Entity will deduct and pay such taxes on behalf of the Consultant.  At the time of the contract award overseas bidder shall present to the Procuring Entity a valid Tax Compliance Certificate/Letter. Local bidders shall submit their Tax Compliance Certificate/Letter at the time of bid submission.
3.8	Consultant to state cost in the national currency: Yes <u>X</u> or No __
4.3	Consultant must submit the original and FOUR copies of the Technical Proposal in a sealed envelope clearly marked 'TECHNICAL PROPOSAL' and the original of the Financial Proposal in a separate envelope labelled 'FINANCIAL PROPOSAL'. The submission must be made in one envelope consisting of BOTH envelopes.
4.4	The envelopes containing the Technical and Financial Proposals shall be placed into an outer envelope and sealed. This outer envelope shall bear the submission address, reference number and title, and be clearly marked "DO NOT OPEN, EXCEPT IN PRESENCE OF THE TENDER OFFICER, BEFORE THURSDAY, March 24, 2020.
4.5	The Proposal submission address is:  JAMAICA PROMOTIONS CORPORATION 18 TRAFALGAR ROAD, KINGSTON 10 ATTENTION: MRS. JODI-ANN JACKSON <b><u>RFP# CI-2020-02 SUPPLY OF CRM SOFTWARE</u></b>  Proposals must be submitted no later than the following date and time: <b><u>Tuesday, March 24, 2020 @10:00 a.m. GMT,</u></b> and should be deposited in the Tender Box labelled: RFP# CI-2020-02 located beside





	<p>the Security/Receptionist desk in the lobby at JAMPRO’s Head Office, 18 Trafalgar Road, Kingston 10.</p> <p>The Bid/Tender Opening will take place on <b><u>Tuesday March 24, 2020 at 10:15 a.m.</u></b></p> <p>No late submissions will be accepted.</p>
<p><b>5.2</b></p>	<p>Criteria, sub criteria, and point system for the evaluation of Simplified Technical Proposals are:</p> <p style="text-align: right;"><u>Points</u></p> <p>i. Specific experience of the Consultants relevant to the assignment:</p> <ul style="list-style-type: none"> <li>• Past record of performance on contracts with Government Agencies and private sector with respect to such factors as cost effectiveness, quality of work, ability to meet schedules and complete services in a timely manner. References should complete at least two client referral forms. [10]</li> </ul> <p style="text-align: right;"><i>Total points for criterion (i): [10]</i></p> <p>ii. Adequacy of the proposed methodology and work plan in responding to the Terms of Reference. Consultant’s technical understanding of the Scope of Work as evidenced by:</p> <ul style="list-style-type: none"> <li>• Ability to execute the service required in a value-oriented manner [7]</li> <li>• Proposed approach to executing stated Scope of Work [25]</li> <li>• Demonstration of software assurance [8]</li> </ul> <p style="text-align: right;"><i>Total points for criterion (ii): [40]</i></p> <p>iii. Key professional staff qualifications and competence for the assignment [20]</p> <p style="text-align: right;"><i>Total points for criterion (iii): [20]</i></p> <p>iv. Suitability of the transfer of knowledge Programme (training) [5]</p> <p style="text-align: right;"><i>Total points for criterion (iv): [5]</i></p> <p>v. Joint venture with an independent Jamaican firm, or the incorporation of national experts into the work team. Jamaican-based sole bidders will be awarded full marks. [5]</p> <p style="text-align: right;"><i>Total points for criterion (v): [5]</i></p> <p style="text-align: right;"><b>Total points for the all five criteria: [80]</b></p> <p>The minimum technical score required to pass is: <b><u>60</u></b> Points</p>



<b>5.4</b>	Those proposals meeting the minimum technical score will proceed to the financial evaluation, which will be done publicly. Proposals not meeting the minimum score will be notified and removed from the process.
<b>5.7</b>	The formula for determining the financial scores is the following $S_f = 20 \times F_m / F$ , in which $S_f$ is the financial score, $F_m$ is the lowest price and $F$ the price of the proposal under consideration.  Proposal with the lowest cost will have satisfied the following criteria: <ul style="list-style-type: none"><li>- Cost related to 1-year licence</li><li>- Cost related to 4-year licence</li><li>- Consideration of any applicable discount</li></ul>
<b>6.1</b>	Expected date and address for contract negotiations: <u>Wednesday, April 8, 2020</u> <u>18 Trafalgar Road</u> <u>Kingston 10</u>
<b>7.2</b>	Expected date for commencement of consulting services Wednesday, April 15, 2020

## Section III

### Technical Proposal - Standard Forms

Refer to Reference Paragraph 3.4 of the Data Sheet for format of Technical Proposal to be submitted, and paragraph 3.4 of Section 2 of the RFP for Standard Forms required and number of pages recommended.

- TECH-1 Technical Proposal Submission Form
- TECH-4 Description of the Approach, Methodology and Work Plan for Performing the Assignment
- TECH 5 Team Composition and Task Assignments
- TECH-6 Curriculum Vitae (CV) for Proposed Professional Staff
- TECH-8 Work Schedule
- TECH-9 Client Referral Form

Form TECH-1      Technical Proposal Submission Form

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[Location, Date]

To: [Name and address of Procuring Entity]

Dear Sirs:

We, the undersigned, offer to provide the consulting services for [Insert title of assignment] in accordance with your Request for Proposal dated [Insert Date] and our Proposal. We are hereby submitting our Proposal, which includes this Technical Proposal, and a Financial Proposal sealed under a separate envelope<sup>1</sup>.

We are submitting our Proposal in association with: [Insert a list with full name and address of each associated Consultant]<sup>2</sup>

We hereby declare that all the information and statements made in this Proposal are true and accept that any misinterpretation contained in it may lead to our disqualification.

If negotiations are held during the period of validity of the Proposal, i.e., before the date indicated in Paragraph Reference 1.12 of the Data Sheet, we undertake to negotiate on the basis of the proposed staff. Our Proposal is binding upon us and subject to the modifications resulting from Contract negotiations.

We undertake, if our Proposal is accepted, to initiate the consulting services related to the assignment not later than the date indicated in Paragraph Reference 7.2 of the Data Sheet.

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

We remain,

Yours sincerely,

Authorized Signature [In full and initials]: \_\_\_\_\_

Name and Title of Signatory: \_\_\_\_\_

Name of Firm: \_\_\_\_\_

Address: \_\_\_\_\_

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1 [In case Paragraph Reference 1.2 of the Data Sheet requires to submit a Technical Proposal only, replace this sentence with: "We are hereby submitting our Proposal, which includes this Technical Proposal only."]

2 [Delete in case no association is foreseen.]

Form TECH-4 Description of Approach, Methodology and Work Plan for  
Performing the Assignment

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(For small or very simple assignments the Procuring Entity should omit the following text in *Italic*)

*[Technical approach, methodology and work plan are key components of the Technical Proposal. You are suggested to present your Technical Proposal (50 pages, inclusive of charts and diagrams) divided into the following three chapters:*

- a) Technical Approach and Methodology,*
- b) Work Plan, and*
- c) Organization and Staffing,*

*a) Technical Approach and Methodology. In this chapter you should explain your understanding of the objectives of the assignment, approach to the services, methodology for carrying out the activities and obtaining the expected output, and the degree of detail of such output. You should highlight the problems being addressed and their importance, and explain the technical approach you would adopt to address them. You should also explain the methodologies you propose to adopt and highlight the compatibility of those methodologies with the proposed approach.*

*b) Work Plan. In this chapter you should propose the main activities of the assignment, their content and duration, phasing and interrelations, milestones (including interim approvals by the Procuring Entity), and delivery dates of the reports. The proposed work plan should be consistent with the technical approach and methodology, showing understanding of the TOR and ability to translate them into a feasible working plan. A list of the final documents, including reports, drawings, and tables to be delivered as final output, should be included here. The work plan should be consistent with the Work Schedule of Form TECH-8.*

*c) Organization and Staffing. In this chapter you should propose the structure and composition of your team. You should list the main disciplines of the assignment, the key expert responsible, and proposed technical and support staff.]*



Form TECH-6 Curriculum Vitae (CV) for Proposed Professional Staff

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1. **Proposed Position** [*only one candidate shall be nominated for each position*]: \_\_\_\_\_

2. **Name of Firm** [*Insert name of firm proposing the staff*]: \_\_\_\_\_

\_\_\_\_\_

3. **Name of Staff** [*Insert full name*]: \_\_\_\_\_

4. **Date of Birth:** \_\_\_\_\_ **Nationality:** \_\_\_\_\_

5. **Education** [*Indicate college/university and other specialized education of staff member, giving names of institutions, degrees obtained, and dates of obtainment*]: \_\_\_\_\_

\_\_\_\_\_

6. **Membership of Professional Associations:** \_\_\_\_\_

\_\_\_\_\_

7. **Other Training** [*Indicate significant training since degrees under 5 - Education were obtained*]: \_\_\_\_\_

\_\_\_\_\_

8. **Countries of Work Experience:** [*List countries where staff has worked in the last ten years*]: \_\_\_\_\_

\_\_\_\_\_

9. **Languages** [*For each language indicate proficiency: good, fair, or poor in speaking, reading, and writing*]: \_\_\_\_\_

\_\_\_\_\_

**10. Employment Record**

[*Starting with present position, list in reverse order every employment held by staff member since graduation, giving for each employment (see format here below): dates of employment, name of employing organization, positions held.*]:

From [Year]: \_\_\_ To [Year]: \_\_\_\_\_

Employer: \_\_\_\_\_

Positions held: \_\_\_\_\_

<p><b>11. Detailed Tasks Assigned</b></p> <p><i>[List all tasks to be performed under this assignment]</i></p>	<p><b>12. Work Undertaken that Best Illustrates Capability to Handle the Tasks Assigned</b>  <i>[Among the assignments in which the staff has been involved, indicate the following information for those assignments that best illustrate staff capability to handle the tasks listed under point 11.]</i></p> <p>Name of assignment or project: _____</p> <p>Year: _____</p> <p>Location: _____</p> <p>Procuring Entity: _____</p> <p>Main project features: _____</p> <p>Positions held: _____</p> <p>Activities performed: _____</p>
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**13. Certification:**

I, the undersigned, certify that to the best of my knowledge and belief, this CV correctly describes myself, my qualifications, and my experience. I understand that any wilful misstatement described herein may lead to my disqualification or dismissal, if engaged.

\_\_\_\_\_  
*[Signature of staff member or authorized representative of the staff]*      Date: \_\_\_\_\_  
*Day/Month/Year*

Full name of authorized representative: \_\_\_\_\_





Form TECH-9 Client Referral Form  
JAMPRO  
18 Trafalgar Road, Kingston 10, Jamaica

Re: \_\_\_\_\_  
(Consultant)

**CLIENT'S REFERRAL FORM**

Please rate the quality of the consultancy services offered by the named company by circling (where applicable) the relevant score for the quality criteria

Excellent = 4      Good = 3      Satisfactory = 2      Unsatisfactory = 1

- |    |   |   |   |   |   |
|----|---|---|---|---|---|
| 1. | How would you rate the overall quality of the service received? | 4 | 3 | 2 | 1 |
| 2. | Specifically, how would you rate the following:                 |   |   |   |   |
| A. | Quality/Relevance of the Content                                | 4 | 3 | 2 | 1 |
| B. | Presentation of Report  | 4 | 3 | 2 | 1 |
| C. | Quality of Assigned Staff                                       | 4 | 3 | 2 | 1 |
| D. | Ability to deliver within the required time                     | 4 | 3 | 2 | 1 |
| E. | Level of Professionalism  | 4 | 3 | 2 | 1 |

3. Would you use the service of the consultant again? Yes \_\_\_\_\_ No \_\_\_\_\_  
If no, why not: \_\_\_\_\_

4. Please give general comments on the consultant's performance. (Attach additional sheet if space is inadequate)

Name: \_\_\_\_\_

Job Title: \_\_\_\_\_

Signature: \_\_\_\_\_

Contact Number/s: \_\_\_\_\_

Company Name: \_\_\_\_\_

**N.B. PLEASE AFFIX YOUR SEAL/STAMP AND RETURN TO THE COMPANY THAT YOU ARE RECOMMENDING**

## Section IV

### Financial Proposal - Standard Forms

Financial Proposal Standard Forms shall be used for the preparation of the Financial Proposal according to the instructions provided under para. 3.6 of Section 2. Such Forms are to be used whichever is the selection method indicated in para. 4 of the Letter of Invitation.

FIN-1 Financial Proposal Submission Form

FIN-2 Summary of Costs

FIN-3 Breakdown of Costs by Activity

Form FIN-1 Financial Proposal Submission Form

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[Location, Date]

To: [Name and address of Procuring Entity]

Dear Sirs:

We, the undersigned, offer to provide the consulting services for [Insert title of assignment] in accordance with your Request for Proposal dated [Insert Date] and our Technical Proposal. Our attached Financial Proposal is for the sum of [Insert amount(s) in words and figures<sup>1</sup>]. This amount is subject to local taxation in the absence of a 3% Tax Exemption Certificate and will be deducted at source and paid to TAJ on behalf of the consultant.

Our Financial Proposal shall be binding upon us subject to the modifications resulting from Contract negotiations, up to expiration of the validity period of the Proposal, i.e. before the date indicated in Paragraph Reference 1.12 of the Data Sheet.

Commissions and gratuities paid or to be paid by us to agents relating to this Proposal and Contract execution, if we are awarded the Contract, are listed below<sup>2</sup>:

Name and Address of Agents	Amount and Currency	Purpose of Commission or Gratuity
_____	_____	_____
_____	_____	_____
_____	_____	_____

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

We remain,

Yours sincerely,

Authorized Signature [In full and initials]: \_\_\_\_\_

Name and Title of Signatory: \_\_\_\_\_

Name of Firm: \_\_\_\_\_

Address: \_\_\_\_\_

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1 Amounts must coincide with the ones indicated under Total Cost of Financial proposal in Form FIN-2.

2 If applicable, replace this paragraph with: “No commissions or gratuities have been or are to be paid by us to agents relating to this Proposal and Contract execution.”

Form FIN-2 Summary of Costs

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Item	Costs			
	J\$	J\$	J\$	J\$
Total Costs of Financial Proposal <sup>1</sup>				

1 Indicate the total costs, net of local taxes, to be paid by the Procuring Entity in each currency. Such total costs must coincide with the sum of the relevant Subtotals indicated in all Forms FIN-3 provided with the Proposal.

Form FIN-3 Breakdown of Costs by Activity<sup>1</sup>

<b>Group of Activities (Phase):<sup>2</sup></b> _____ _____	<b>Description:<sup>3</sup></b> _____ _____			
<b>Cost component</b>	<b>Costs</b>			
	<i>J\$<sup>1</sup></i>	<i>J\$<sup>1</sup></i>	<i>J\$<sup>1</sup></i>	<i>J\$<sup>1</sup></i>
Remuneration <sup>5</sup>				
Reimbursable Expenses <sup>5</sup>				
Subtotals				

- 1 Form FIN-3 shall be filled at least for the whole assignment. In case some of the activities require different modes of billing and payment (e.g.: the assignment is phased, and each phase has a different payment schedule), the Consultant shall fill a separate Form FIN-3 for each group of activities. For each currency, the sum of the relevant Subtotals of all Forms FIN-3 provided must coincide with the Total Costs of Financial Proposal indicated in Form FIN-2.
- 2 Names of activities (phase) should be the same as, or correspond to the ones indicated in the second column of Form TECH-8.
- 3 Short description of the activities whose cost breakdown is provided in this Form.
- 4 Indicate between brackets the name of the foreign currency. Use the same columns and currencies of Form FIN-2.
- 5 For each currency, Remuneration and Reimbursable Expenses must respectively coincide with relevant Total Costs indicated in Forms FIN-4, and FIN-5.

## Section V

### Terms of Reference

#### CRM Software Solution

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##### **I. BACKGROUND**

Jamaica Promotions Corporation (JAMPRO) is seeking to implement a new Client Relationship Management (CRM) system to address the challenges experienced with the organization's existing CRM system. The Corporation serves as the country's national investment & export promotions agency that has responsibility for attracting new investment projects and ensuring their smooth establishment and operations within Jamaica; as well as facilitate the expansion & diversification of the country's exports profile. The management of its clients is therefore a critical element in its ability to fulfil its statutory mandate.

At present, JAMPRO's existing CRM system does not fully address all the needs of its various departments, including sales & promotions and project implementation, and as a result it hampers the ability of the departments to meet their deliverables on a timely basis. JAMPRO is currently operating a 2014 Microsoft Dynamics on-premise CRM solution. The intention is to move a secure cloud-based solution.

##### **II. CONSULTANCY OBJECTIVE**

The overall objective is to implement a new CRM system based on detailed business requirements which will improve the sales and promotions process.

##### **III. SCOPE OF SERVICES**

To realize project success, the consultant will be required to develop and execute a project plan for the development and implementation of the new CRM solution, including but not limited to:

- Stakeholder consultations with key staff members to build out the relevant workflows;
- Provide system documentation for the workflows, e.g. customizations;
- Configuring the new software solution to address CRM's mandatory functional requirements;
- Deploying & testing the solution, and
- Providing technical transfer of knowledge to the relevant identified staff members, e.g. the MIS team.

##### **IV. EVALUATION**

Evaluation of the proposals will take place in accordance with Sections 5.2, 5.4 and 5.7 in the above data sheet. Note that the formula for determining the financial scores is the following:

$S_f = 20 \times F_m / F$ , in which  $S_f$  is the financial score,

Fm is the lowest price and F the price of the proposal under consideration.

Proposal with the lowest cost will have satisfied the following criteria:

- Cost related to 1-year licence
- Cost related to 4-year licence
- Consideration of any applicable discount

## **V. METHODOLOGY**

Given the critical importance of the CRM to the operations of the organisation, a dedicated project team will be established to support the consultancy. This project team will drive the project internally and will facilitate the flow of information between the consultant and the rest of the stakeholder departments. Ultimately, final decisions on the project is subject to the review and approval by the Executive Management team.

## **VI. QUALIFICATIONS AND CHARACTERISTICS OF THE CONSULTANCY**

### **Characteristics**

- Type: Firm
- Period: Seven months
- Location: Local/International, with ability to consult directly with the relevant project team members on a regular basis.

### **Qualifications of the Consultant**

The firms should have the following qualifications and experience:

- At least 5 years' experience working on similar projects, with Team Lead having at least 3 years' experience on similar projects;
- Confirmed authorization to provide the software solution;
- Experience working with Government Ministries, Departments and Agencies (MDAs); and
- Strong interpersonal skills and demonstrated proactive approach to problem solving.

## **VII. RESPONSIBILITY**

### **Responsibilities of the Consultant**

The consultant will be required to meet and fulfil the project's deliverables as outlined in Section VI below.

### **Responsibilities of JAMPRO**

JAMPRO will provide relevant technical documents required for the successful execution of the assignment. These documents are to be used as a guide during the development and use of the software. These technical documents include but are not limited to the following:

- JAMPRO's business processes which require CRM technology component in conducting activities; and
- JAMPRO's Business and CRM Progression Requirements

## **VIII. REPORTING REQUIREMENTS AND TIME SCHEDULE FOR DELIVERABLES**



Payment will be made in keeping with the submission and acceptance of the deliverables within the stipulated timelines below. In view of the Scope of Services outlined above, the schedule being proposed is also outlined below:

<b>DELIVERABLES</b>	<b>TIME PERIOD</b>	<b>REVIEW PERIOD</b>	<b>PAYMENT</b>
<b>DELIVERABLE 1:</b> Inception Report - Work schedule	End of Week 2	1 week	10%
<b>DELIVERABLE 2:</b> Workflows Requirements analysis & conceptual design	End of Week 6	2 weeks	30%
<b>DELIVERABLE 3:</b> Pilot System Deployed	End of Week 12	1 week	30%
<b>DELIVERABLE 4:</b> User Acceptance Testing Report	End of Week 14	1 week	10%
<b>DELIVERABLE 4:</b> System Deployment	End of Week 17	1 week	10%
<b>DELIVERABLE 5:</b> Finalized Technical & User Manuals	End of Week 19	1 week	10%

#### **IX. SUPERVISION AND REPORTING REQUIREMENTS**

The Jamaica Promotions Corporation (JAMPRO) is the Contracting Authority and shall approve any contractual amendments and payments. The Consultant will submit reports & deliverables directly to the Vice President of Marketing or designate.

## ANNEX to the TERMS OF REFERENCE: BUSINESS REQUIREMENTS

### Key Business Requirements

The table below outlines JAMPRO's business needs to support detailed functional requirements for systems configuration of the CRM software to be used.

Process	Mandatory Requirement Description	Supplier (Check the feature that can be provided)
Manage enquiries	Identify type of service delivered	
Manage investment & export opportunities	Classification of clients based on stage of engagement, status in sales funnel and type of client. This should include an account management designation (e.g. key account), based on JAMPRO's 'Prime Account Management Strategy' currently being developed and should be taken into consideration once completed during implementation of the CRM software.	
	Capability to identify existing clients when creating a new contact to ensure no duplication	
	Identify type of service delivered at each stage of engagement/ sales funnel	
	Workflow capability - allow for the transition of clients between stages of client engagement/ sales funnel and between relevant departments with alerts when changes occur, and activities are assigned	
	Ability to accept/ reject/ reassign activities being transitioned from one department to another with input of reasons for rejections and reassignments	
	Ability to input multiple contacts per company, and in addition to standard contact information, input demographic information for certain specified clients – e.g. birthday, details of family members, special occasions	
	Ability to input and track multiple activities for a single client, e.g. dashboard/ snapshot	
	Ability to create contact at any stage of engagement and assign related status, e.g. lead, initial investment, re-investment based on systems controls and user access	
	Ability to tag contact with key JAMPRO interactions for each stage of engagement with client	
	Facilitate input of corporate and sector team targets, e.g. value of capital expenditure, export sales, number of jobs	
General	Allow for remote access and update CRM real time	
	Ability to import data from Microsoft Suite	
	Calendar Functionality (e.g. alert/remind the owner of a required action) tied to Microsoft Outlook Calendar	

Process	Mandatory Requirement Description	Supplier <i>(Check the feature that can be provided)</i>
	Mobile electronic device use with ability to edit the system	
	Ability to attach documents/ files	
	Compatible with a range of browsers and operating systems	
	Ability to assign tasks with timelines to employees	
	Ability to import and export data to Microsoft Suite	
	Ability to create tasks, assign and notify person(s) assigned to, mark tasks completed and close	
	Ability to identify date of update to specific fields	
	Ability to import bulk data from external databases	
	Ability to redefine stages of client engagement and sales funnel	
	Ability to attach emails to view email history and details provided	
	Ability to link a single contact with multiple companies	
	Ability to edit content in specified fields	
	Ability to add new fields based on user access	
	Ability to show/ hide fields	
Reporting, business intelligence and performance monitoring	Simple process for report creation	
	Reports must be able be exported in various formats (e.g. doc, pdf, csv, xml, txt, xls, xlsx etc)	
	System should support creation and generation of ad-hoc reports	
	Details of client enquiries by category	
	Client engagement stage and sales funnel specific reports e.g. Investment/ Export Leads, Export Orders, Investment Prospects; Sales funnel report by volume and value (by stages)	
	Client profile reports	
	Ability to create reports based on any main field(s) in the system	
	Standard dashboards for management	
	Ability to conduct key word(s) search across all fields and generate search results	
	Ability to create report on diverse mix of contacts based on defined parameters Ability to generate and export diagrams from reports - graphs, pie charts, funnels etc	
Systems administration	User access is controlled by user profile assigned to each user. Enforce role-based access for all users and restrict user access to only those functionalities assigned to the user	
	Access to all information related to clients based on user access rights tied to stages of client engagement	
	Password controls	
	Ability to limit access to sensitive data	

Process	Mandatory Requirement Description	Supplier (Check the feature that can be provided)
	Audit trail of changes in/to the system Post implementation tech support	

#### Optional Business Requirements

The table below outlines optional characteristics that would complement the mandatory functional requirements. (Note that this will not form part of the evaluation process and serves purely as an information gathering process.)

Process	Optional Requirement Description	Supplier (Check the feature that can be provided)
Manage enquiries	Interoperability with Call centre software, potential for integration	
Marketing	Create and disseminate email marketing campaign ( <i>this requirement is to be further detailed on examination of standard offering in CRM software selected</i> )	
	Ability to integrate data from social media platforms to use social media to reach customers ( <i>this requirement is to be further detailed on examination of standard offering in CRM software selected</i> )	
General	Predictive text/ auto complete search in specified fields to prompt users once information already exists in the system	
	Predictive text/ auto complete search should not be case sensitive	
	Ability to scan/upload business card to populate contact details	
	Ability to send email directly from CRM to contacts using official email address and ensuring that copy of email is recorded in MS Outlook	
	Ability to extract contact details from emails to update CRM	
Reporting, business intelligence and performance monitoring	Reports should be generated in pdf	

## Section VI

### Standard Forms of Contract

***[JAMPRO Standard Contract Template will be used]***

## CONTRACT OF SERVICES

**THIS CONTRACT** is made on the day of \_\_\_\_\_, 2019 between the **JAMAICA PROMOTIONS CORPORATION (JAMPRO)**, a Corporation established under and existing by virtue of the Jamaica Promotions Corporation Act, 1990, having its principal offices at 18 Trafalgar Road, Kingston 10 (hereinafter referred to as ("**JAMPRO**") of the **ONE PART** and [name of the Consultant and the address] (hereinafter referred to as the "**Consultant**") of the **OTHER PART**.

JAMPRO and the Consultant may hereinafter be referred to collectively as "**the Parties**" and each "**a Party**".

[List of objectives of Parties].

The Parties agree as follows:

### 1. **The Project**

[Project Outline]

### 2. **The Deliverables**

[List of Deliverables]

### 3. **Contract Sum**

3.1 JAMPRO shall pay [insert Contract Sum] (exclusive of General Consumption Tax) to the Consultant for the execution of the Project in accordance with the following payment schedule:

[Schedule of Payments]

3.2 [Method of Payment]

### 4. **Contract Term**

4.1 The Contract Term shall be for [Insert Contract Term]. For the avoidance of doubt, this Contract Term excludes those periods reserved by JAMPRO for review.

4.2 The Contract Term shall not be extended without the prior written approval of the Parties.

### 5. **Representatives**

5.1 The Representative of the JAMPRO shall be [Name of Supervising Officer].

5.2 The Representative of the Consultant shall be [Name of individual].

## **6. Representations and Warranties**

- 6.1 The Consultant warrants and undertakes to JAMPRO that he/ she has the necessary skills to undertake and complete the Project on the agreed terms.
- 6.2 The Consultant represents and warrants that he/ she shall diligently and in a professional manner complete the Project in accordance with the stipulated timeframe for delivery of the Project.

## **7. Termination**

- 7.1 Either Party may terminate the Contract by giving to the other Party [insert termination period] written notice of their intent to terminate.
- 7.2 Upon termination, the Contract Sum shall be prorated based upon the stage of the Project completed to date and the submission of an invoice for work completed to date.

## **8. Dispute Resolution**

[Insert Dispute Resolution and Rights]

## **9. Notice**

Each Party's address for service of any notice under this Contract shall be its above-mentioned address or such other address as may be specified by the Party in written notice to the other Party.

## **10. Confidentiality**

The Consultant undertakes not at any time after the date hereof to divulge any information in relation to JAMPRO's affairs or business, or method of carrying on business or to make use of the information supplied by JAMPRO by virtue of this Contract, except for purposes of the discharge by the Consultant of her obligations under this Contract, and this clause shall continue to have effect notwithstanding termination of this Contract for any cause.

On termination of this Contract, the Consultant further undertakes to return to JAMPRO all written material embodying information designated by JAMPRO as confidential and all correspondence thereof and to ensure observance of the provisions of this clause, both during the subsistence of this Contract and thereafter.

## **11. Waiver**

The failure of either Party to enforce its rights under this Contract at any time for any period shall not be construed as a waiver of such rights.

**12. Severance**

If any part, term or provision of this Contract is held to be illegal or unenforceable neither the validity nor enforceability of the remainder of this Contract shall be affected.

**13. Entire Agreement**

This Contract contains the entire agreement of the Parties and no alterations, amendments or modifications to this Contract shall be valid unless executed in writing by the Parties.

**14. Governing Law**

This Contract shall be governed and construed in accordance with the Laws of Jamaica.

**15. Jurisdiction**

Each Party agrees to submit to the jurisdiction of the Courts of Jamaica.

**IN WITNESS WHEREOF**, the Parties hereto have caused this Contract to be signed in their respective names as of the date first stated herein.

SIGNED for and on behalf of the )  
**JAMAICA PROMOTIONS** )  
**CORPORATION** by: )  
 )  
in the presence of: )  
 )

Signature: \_\_\_\_\_

\_\_\_\_\_  
**WITNESS**

SIGNED by [insert name of Consultant] )  
 )  
 )  
in the presence of: )

Signature: \_\_\_\_\_

\_\_\_\_\_  
**WITNESS**