



Consultancy Ref No: 04/IT/Central/24-25

RFP for Consultancy Services-WWF Pakistan

Subject:

Hiring of Firm for Deployment, Implementation and Training of Odoo for WWF-Pakistan

Application Submission:

HIRING OF CONSULTANT



WWF-Pakistan is looking for qualified and experienced consultants for the purpose of the project titled " **HIRING OF FIRM FOR DEPLOYMENT, IMPLEMENTATION AND TRAINING OF ODOO FOR WWF-PAKISTAN**". Interested consultants who meet the eligibility criteria are encouraged to review the detailed Terms of Reference (TORs) available on the WWF-Pakistan website:

<https://wwf.org.pk/consultancy/>

To address any queries, please contact us at **mahmed@wwf.org.pk**.

The deadline for submission is **19th September 2024** at **17:00** hours.

Sealed Technical and Financial Proposal shall be submitted by mentioning Title on Envelope on below Address

**Manager Procurement & Consultancies
WWF-Pakistan Head Office, Inside Ali Institute
Ferozpur Road Lahore**

RFP – Consultancy Services

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1) INTRODUCTION & BACKGROUND

Contract type:	Consultancy/Services/After Sales Services
Duration of assignment:	1 Year from Signing of Agreement
Type of Consultant	Only Firms Gold and Silver Category Odoo Only

Background of Project & Assignment:

WWF-Pakistan, is soliciting proposals from different firms to deploy baseline Odoo. This will be a joint collaborative implementation effort by the team of WWF-Pakistan and Firm to setup a foundation for Integrated Enterprise Resource Planning (ERP). This will include baseline configuration, customization and training of Odoo. Firm will also be responsible for requirement gathering from users, documentation, After sales Services and Preparation of Training Manuals of user requirements for WWF-Pakistan business processes automation.

The objective of the task:

The objective of the assignment is to identify and select a software development/ IT firm with proven experience in configuration, customization, development and implementation in latest version of Odoo as well as process reengineering.

2) GENERAL CONDITIONS

- 1) The WWF-PAKISTAN reserves the right to reject or accept any proposal. The WWF-PAKISTAN reserves the right to proceed with the implementation of any Service, in whole or in part, as described in the Proposal.
- 2) The WWF-PAKISTAN reserves the right to engage in discussions with any BIDDER to clarify responses or discuss certain issues with regards to the proposal or services requested. The WWF-PAKISTAN has no obligation to notify the other BIDDERS of the discussions, clarifications, or other information provided by a BIDDER. Any additional information required for preparation of the BID shall be distributed to all participants at the same time.
- 3) The WWF-PAKISTAN reserves the right to award the proposal based on experience, qualification, completion date, service cost and other criteria, and not necessarily the lowest cost.
- 4) Based on the RFP BID the WWF-PAKISTAN is entitled to change/replace or omit any clause/part of the preliminary defined scope of services of the proposal. The WWF-PAKISTAN shall conduct negotiations with WWF to achieve the full compliance to the requirements.
- 5) The WWF-PAKISTAN reserves the right in the event the successful CONSULTANT fails to comply with the terms and conditions as listed, to cancel this contract and award it to another CONSULTANT without penalty or action against the WWF-PAKISTAN. The RFP does not constitute an agreement or order.
- 6) The RFP is not a binding agreement between the parties, submission of a proposal or response by a proponent is voluntary.
- 7) By submitting a bid, the BIDDER is deemed to have acknowledged all of the undertakings, specifications, terms and conditions, **WWF Fraud and Corruption Prevention and Investigation Policy (Annex 2)** contained in the RFP, and to be bound by them if the BID is accepted. All expenses incurred by the Bidder in connection with the preparation of its proposal are to be borne by the RFP participant, and the WWF-PAKISTAN shall not incur any obligation whatsoever toward the Bidder regardless of whether such bid is accepted or rejected.

3) OBJECTIVE

The high-level objectives of this project are as follows:

- a. Data Gathering regarding WWF-Processes and Implementation of Odoo.
- b. Initially the ERP should be required for 50x Users which may increase later as per the Consent of WWF-Pakistan.
- c. Add the following Odoo's Modules:
 - i. Financial Management/Donor Management
 - ii. Procurement (P2P)/Consultancy Services
 - iii. Contract Management
 - iv. HR/Payroll
 - v. Asset Management.
 - vi. Project Management
- d. Redeveloping all Templates with WWF logos, images colors, etc.
- e. Perform customization where required.
- e Development of User Training Manuals and arrange on on-site training of end users on Odoo.
- f. Training of IT staff on configuration, customization, development, and implementation of Odoo.
- g. Compilation of Software Requirements Specification (SRS) and functional specification documents. The main components should comprise but not limited to the following: -
 - i. Reengineered suggested process flow
 - ii. DFDs
 - iii. Functional requirements
 - iv. Non-functional requirements
 - v. External interface requirements
 - vi. Functional specification document
 - vii. Roadmap for new development/customization based on SRS.
 - viii. Development of User-Friendly Dashboards that can present Monthly, semiannually, Annually and Project Based Integrated Reports and Progress.

4) Deliverables

The main components and deliverables of the project are as follows:

- i. Project Charter, Inception Report
- ii. Project Schedule, Work Breakdown Structure
- iii. Fortnightly Progress Reports
- iv. Gap Analysis Report
- v. Deployment of project at on-premises
- vi. Training material
- vii. End user training
- viii. Customized Source code and related technical documentation
- ix. WWF-Pakistan IT team's Training on Odoo
- x. "As Is" document
- xi. "To Be" document
- xii. Software requirements specification document
- xiii. Functional specification document
- xiv. Roadmap for future development (project plan and deliverables)
- xv. Data Migration shall also be the responsibility of the Consultant.

Note: Deliverables might vary based on Final Discussion in Scope of Work before signing of Agreement.

5) REQUIREMENTS

The Consultant/Consultancy Firm should possess the following qualifications and expertise:

- Minimum of Five (05) local and international implementations of projects of PKR 7 million or more
- Minimum of Two (02) implementation with more than 60+ users
- Should be an official Gold or Silver partner of ERP Solution Provider.
- Must have 'Partner Centre of Expertise' certification
- Having minimum of 5 ERP certified consultants. Brief Profiles of the Consultants should be furnished

6) CORRESPONDENCE & SUBMISSION OF PROPOSAL

1. Application Submission:

Sealed Technical and Financial Proposal shall be submitted by mentioning Title on Envelope on below Address

**Manager Procurement & Consultancies
WWF-Pakistan Head Office, Inside Ali Institute
Ferozpur Road Lahore**

2. If Any **Queries** may send through Email by attention to the Following:

To: Faiza khan (fakhan@wwf.org.pk)

Cc: Muzzammil Ahmed (mahmed@wwf.org.pk)

The RFP submission deadline is mentioned on the website.

3. Any information and responses to inquiries will be made in writing and distributed by email to all proponents. Inquiries after the foregoing deadline will not receive a response.

7) FORMAT OF THE PROPOSAL

The BID submitted by the participant must be structured as per the below provided instructions:

- 1) **Application Form available at WWF-Website** - General information about the Bidder, covering, qualification and experience, CV.
- 2) **Company information including:**
 - Scope of business services
 - Years in business [5 or more year's incorporation/registration]. Please provide Registration certificate.
 - Customers / List of clientele
 - Copies of Awards / Supply Orders of similar services
- 3) **Details of relevant company experience preparing/deploying an ERP Solution. (Please provide necessary documentary evidence):**
 - Minimum of Five (5) local and international implementations of projects of PKR 7 million or more

- Minimum of Two (2) implementations with more than 60+ users
- Should be an official Gold or Silver partner of ERP Solution Provider
- Must have 'Partner Centre of Expertise' certification or equivalent
- Having a minimum of 5 ERP-certified consultants. Brief Profiles of the Consultants should be furnished

4) Details of technical roadmap to complete ERP modules including the proposed architecture/design and solution for the software applications.

- A sub-roadmap will be required for each module, comprising the ERP.
- Initial priority must be given to the Financial Module.

5) Details of staff assigned to Project:

- Total staff assigned to the development/customisation/implementation of the ERP software applications project (Please specify name, role and CV of each person)
- Total staff assigned to the project for Training purposes (Please specify name, role and CV of each person). Where same staff are involved in both tasks one CV will be sufficient with each role specified.

6) Detailed Project Implementation Schedule/Work Plan to complete:

- Design, customization, installation and deployment of specified modules in 16 weeks after contract signing
- Entire contract including training and defects period by 20 weeks after contract signing.
- Detailed Work Plan/Timelines of the Project shall be provided by the consultant at the time of submission of Proposal.

7) Details of licensed software quoted including price.

- Details of total lump sum price inclusive of applicable taxes (GST) with separate prices for each component as required in the RFQ Document.

8) Details of two referees from Private/Donor sector to whom firm/bidder has supplied ERP System

- Support capabilities
- Any other documentation to enhance proposal.

8) FINANCIAL PROPOSAL

- The proposed prices shall be provided in PKR, the total price shall include all costs related to service provision including all Direct and Indirect taxes and Out of Pocket Expenses upto max Ceiling (If Any).
- The consultant will submit the cost of the assignment in a lump sum, including all applicable taxes according to the Government of Pakistan:

S. #	Description	Unit Price [PKR]	GST [PKR]	Total Price [PKR]	Delivery/ Installation/ Completion time
1.	Design, Customization, Installation & Deployment of an ERP System along with the Training of Staff				Sixteen (16) Weeks
2.	Hosting/Deployment services of an ERP "On Cloud" for (02) Years				
3.	O&M Cost for 1 Year				Four (04) weeks post-deployment of ERP solution
4.	Total Price [PKR]				

Note:

Preference would be the OTC for implementation along with O&M and Cloud hosting cost on the third party without annual Subscription through Proper Odoo Authorization.

Per user cost shall be provided by the consultant separately to increase and decrease the User later on for calculation only.

The Payment Terms are as follows:

No.	Milestone		Payment
1	Upon Kicking Off the Project	<ul style="list-style-type: none"> Project Charter, Inception Report Project Schedule, WBS Training plan for end user and IT team 	20%
2	Requirement Gathering/Process Reengineering	<ul style="list-style-type: none"> "As Is" document "To Be" document SRS document FSD document All complete documents along with diagrams, use cases 	20%
3	Completion Implementation of Modules and User and Purchase of Subscriptions for End-user	<ul style="list-style-type: none"> Financial Module HR, Procurement/Consultancy, Project Management Modules 	30%
4	Training of Employees and Provision of User Manuals	<ul style="list-style-type: none"> Upon On/Off site training Of Employees and Provision of Training Manual against each Modules 	20%
5	Removal of Bugs/ Software Malfunctioning/Defects (if any) and provide Manual of the deployed Software/Solution.	<ul style="list-style-type: none"> After completion of Defect Liability and Testing Period of 3 Months 	10%

9) EVALUATION PROCESS

Applicant's proposal shall be evaluated based on Quality and Cost Based Selection (QCBS) method. Under QCBS both technical and financial proposals shall be evaluated as per following criteria against a maximum score of 100 points.

A) Technical Proposal (70%)

- Detailed workplan
- Expression of interest (EOI)
- Company's Profile
- Detailed methodology

B) Financial Proposal (30%)

- Detailed financial proposal which should be inclusive of all applicable taxes and out of pocket expenses. The financial proposal should follow a breakdown structure i.e., specifying cost(s) to each head and subhead
- Company's registration certificate
- NTN detail(s)
- Any legal or technical certification required for the task
- Audited Accounts Report (if available) of last FY

Note: Late/ incomplete submissions will not be accepted. Only three (03) top-ranked firms will be included in the comparative process

Conditions:

- WWF-Pakistan reserves the right to accept any proposal or reject all proposals.
- Only shortlisted consultants will be contacted for further consideration.
- Only remuneration will be paid to the consultant, the boarding and lodging will be their own responsibility

Copyrights: WWF-Pakistan will have the copyright for the entire data and reports; the consultant(s) will have no right to use the data/reports in any form or publication.

10) DOCUMENTATION AND CONFIDENTIALITY

All documents completed based on requirements of the present RFP shall be the property of the WWF-Pakistan, and shall not without the consent of the WWF-Pakistan be used, reproduced or made available to third parties beyond what is necessary in respect of the fulfillment of the Project. All documents issued and information given to the BIDDER shall be treated as confidential.