



भारत हेवी इलेक्ट्रिकल्स लिमिटेड

Bharat Heavy Electricals Limited

पारेषण व्यापार समूह, नोएडा/ TBG, Noida

मानव संसाधन प्रबंध / Human Resources Management

NIT NO: TBG: HRM: CSR: A041

Date: 05.10.2017

TO,

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\_\_\_\_\_  
\_\_\_\_\_

## **NOTICE INVITING TENDER**

(For conducting Impact Assessment of BHEL Corporate Social Responsibility (CSR) Project "Heal A Soul 2")

Bharat Heavy Electricals Limited (BHEL) a Maharatna PSU, India's largest Engineering and manufacturing Company is engaged in the design, engineering, manufacture, construction testing, commissioning, and servicing of wide range of products ,systems and services for the core sectors of the economy viz Power, Transmission, Industry, Transportation, Renewable energy, Oil and gas and Defence.

TBG (Transmission Business Group) Unit of BHEL intends to conduct the third party impact assessment study of Corporate Social Responsibility (CSR) Project "Heal A Soul 2"(briefed in **Annexure-A**).

Tender bids are invited for conducting Impact Assessment of the said CSR project.

**Last date for submission of Tender : Date: 27.10.2017 time: 3.00 PM**

**Opening of Techno commercial bid : Date: 27.10.2017 time: 3.30 PM**

**Opening of Price bid : to be informed to techno-commercially qualified bidder**

## Impact Assessment study

### a) Objective of the Impact Assessment Study

Assessment Criteria	Assessment Questions
Relevance	Did the overall goal match needs of the project area? Did the project's baseline data correctly address needs of the area
Efficiency	What outputs were achieved and whether they were according to the plan? Was the implementation schedule as planned? Was the project cost within planned limit? Was the fund utilization prudent?
Effectiveness & Uniqueness	Did the outputs help achieve the goal? Did the project have any unique feature? Comparing the inputs to the extent of goals achieved, can project implementation be considered to be effective? Can the project be replicated?
Impact	What were the various tangible and intangible positive and/or negative impacts (Socio-economic, Environment, Policy, Technology, and Awareness) on different stakeholders of the project?
Sustainability	Would the impacts created by the project sustain? Considering the present course of project, is the project sustainable? If not, what modifications and corrections need to be done with project execution methodology?

### b) Impact Assessment report shall cover the following:

1. Objective of the Project
2. Whether objective met. If yes, then to what extent
3. Outcome of the project are based on the conclusion of Baseline Indicators
4. Expected impacts in the long run
5. Coverage of other points as mentioned in the Objective tabulated in point a) above
6. Intangible benefits derived from completed projects

### c) Methodology, Coverage and Sampling Plan:

- I. The selected agency has to visit the NGO and interact with various stakeholders including beneficiaries, project implementation agency and their representatives, BHEL's CSR co-coordinators, public authorities etc. for the purpose of study. The agency would design actual sampling plan, as per the demand/nature of the project
- II. Agency has to submit a brief research proposal and questionnaire, describing the proposed research methodology to be adopted including methods and tools to be used for data collection; manpower requirements defined for the study, keeping in view geographical distribution of samples.
- III. **Sample size:** at least 30 % of total beneficiaries of each chapter/centre covered in CSR Project "Heal A Soul-2"

- d) **Eligibility of Agency for carrying out Impact Assessment study**  
(Evaluation would be done as per **Annexure B**)

The Agency applying to carry out Impact Assessment must fulfil the following conditions:

1. The Agency may be a Government Undertaking / Registered Company / Registered Consultancy Firm / Registered Non-Government Organization / Academic Institution, specializing in conducting Impact Assessment.
2. The Agency must have a minimum of **three years' experience** of carrying out Impact Assessment in the domain of Corporate Social Responsibility/ Sustainability Services/ Community Development Projects financed by any Central Ministry/ World Bank/ NABARD and/or other international donor institution (e.g., ADB, EU etc) or Central / State Public Sector Enterprise.
3. leader/head leading the team of impact assessment study must have **post graduate qualification** specialised in Social Science/Economics/ Management/ Project research/Math/Statistics/Philosophy/Social Works as part of the curriculum and must have experience of **at least 3 years**.

e) **How to Apply?**

It is two part tender bid. It should contain three envelopes namely 1,2 and 3.

Envelope 1	<p>It should contain Techno-commercial bid covering signed copy of all pages of this NIT, all annexures, work order/letter from client; PG certificate and CV of key persons and all relevant documents. All documents must be signed and stamped. It must be sealed properly. It must <b>not</b> contain Quoted Price bid. Following information should be prominently <b>written</b> on envelope:</p> <p><b>Envelope 1: Part-I Techno-commercial Bid</b>  <b>For : Impact assessment of BHEL CSR Project "Heal A Soul 2"</b>  <b>Ref: NIT NO: TBG: HRM: CSR: A041 date:05.10.2017</b>  <b>Submitted by: Name and seal of competent person of the agency, with contact no.</b></p>
Envelope 2	<p>It should contain only one document i.e. Quoted Price in the format <b>Annexure-C</b>. It must be signed and stamped. It must be clearly filled. Envelope must be sealed properly. Following information should be prominently <b>written</b> on envelope:</p> <p><b>Envelope 2: Part-II Price Bid</b>  <b>For : Impact assessment of BHEL CSR Project "Heal A Soul 2"</b>  <b>Ref: NIT NO: TBG: HRM: CSR: A041 date:05.10.2017</b>  <b>Submitted by: Name and seal of competent person of the agency, with contact no.</b></p>
Envelope 3	<p>Both Envelope 1 and 2 should be sealed separately. These two bids are to be placed in other envelope (Envelope 3). It must be sealed properly. Following information should be prominently <b>written</b> on envelope:</p> <p><b>Envelope 3: Tender Bid</b>  <b>For : Impact assessment of BHEL CSR Project "Heal A Soul 2"</b>  <b>Ref: NIT NO: TBG: HRM: CSR: A041 date:05.10.2017</b>  <b>Submitted by: Name and seal of competent person of the agency, with contact no.</b></p>

Tender Bid should be sent (via post/courier/personally) to following address so that it should reach there by Time: **3.00 PM** Date: **27.10.2017**

Tender Box for CSR  
 BHEL-TBG, 5th Floor, Tower-A, Advant Navis IT Business Park  
 Plot No. 07, Sector-142, Express Way, Noida  
 Dist. Gautam Budh Nagar (UP), PIN-201305

**f) Person to be contacted for clarification if any**

Sh. Sarin Sondawale; Dy Manager- HR;  
 BHEL-TBG; 5th Floor, Tower-A; Advant Navis IT Business Park; Plot No. 07, Sector-142;  
 Express Way, Noida; Dist. Gautam Budh Nagar (UP), PIN-201305;  
 Email: [sarin@bhel.in](mailto:sarin@bhel.in); Phone: 01206748491; Mob: 9999743756

**g) Evaluation Process for techno-commercial qualification:**

Based on the documents submitted, the techno-commercial & financial capability of the participating agencies shall be evaluated as per evaluation methodology indicated in **Annexure-B**.

**h) Commercial Rejection Criteria**

1. Bid should be submitted in **Two Bid System. Two separate sealed envelopes (1 and 2) should be placed in Envelope 3.**
2. If it is found that Bids in envelope 1 contains quoted price bid, it shall be rejected out rightly. It should be ensured that “unquoted” price bid will be in Envelope 1 and “quoted” price bid will be in envelope 2.
3. If it is found that, price bid is not quoted in the format **Annexure C**, it shall be rejected.
4. Agency scoring less than 50 marks in Evaluation Process for techno-commercial qualification as in Annexure B, would be termed as techno-commercially disqualified. Agency scoring “0” in any of the column of SN 2 and SN 3 of Annexure B; it would be techno-commercially disqualified.

**i) Evaluation Process for Price bid**

- 1 Price bid of only techno-commercially qualified bidders will be opened. If it is found that, price bid is not clearly signed and sealed by competent person of the agency, it would be rejected. Conditional price bid will be rejected out rightly.
- 2 The bidder who quotes lowest price in the format of price bid **Annexure C** will be termed as L1 (Lowest) or successful bidder. The work order would be issued to successful bidder.
- 3 In case of tie in price bid, agency scoring more marks in **Annexure B** will be given preference.

**j) Time Schedule**

The total exercise has to be completed within a period of 45 days from the date of start of work (date of issue of work order)

S.N.	Activity	Duration in Days
1	Study of the Project by the agency – its nature, area of operation, etc.	Within a period of maximum of 45 Days
2	Preparation & submission of evaluation materials , sampling method and action plan	
3	Pre-testing, adjustment of evaluation materials/ and Pilot testing	
4	Site movement, Data Collection	
5	Data Entry, Compilation, Processing and data Analysis	
6	Submission of 1st Draft to BHEL	
7	Preparation, submission and acceptance of final report after receiving the comments from BHEL	

**k) Payment terms:**

The payment shall be made to the successful bidder through EFT, as per the following norms:

Sr.No.	Milestone	% of fund to be released
1	Submission of Impact assessment Methodology	10%
2	Submission of 1 <sup>st</sup> Draft Report	40%
3	Submission of Final Report	50%

The successful bidder should give EFT details (account verified by the concerned Bank official) along with cancelled/crossed original cheque.

No other way of payment is agreeable except EFT. EFT stand for e-Fund Transfer.

**l) BHEL Rights:**

1. BHEL reserves the right to:
  - 1.1 Postpone the above mentioned date without assigning any reason whatsoever
  - 1.2 Ask for further clarifications during techno commercial scrutiny of bids received
2. BHEL shall not be responsible for any delay, loss, damage for bids sent by post/courier/hand. Damaged or improperly sealed bid shall not be accepted.
3. Bids reached after the due time/date shall not be accepted.
4. Canvassing i.e. soliciting favour, seeking advantage etc. in any form is strictly prohibited and any bidder found to be engaged in canvassing shall be liable for rejection of its bids.
5. If the bidder deliberately gives any wrong information in the tender to create any circumstances for the acceptance to its bid, BHEL reserves the right to reject such bids. Action would be taken as per Rules.

**m) Arbitration:**

Any disputes on both sides to be referred to Head HR of TBG/IS (BHEL), for settlement who will be the final authority.

**n) Security Deposit:**

Security Deposit of 10% of the tender value should be furnished by successful L1 bidder before the commencement of the work in the form of Bank guarantee/DD/NEFT/National Saving Certificates / FDR from any scheduled bank. Same will be returned after satisfactory completion of the work. Security amount does not bear/earn any type of interest. If the said work is not satisfactorily completed, the security amount would be forfeited.

## Brief of the TBG CSR Project

### Name of the Project:

“Heal A Soul 2” (Providing medical assistance (Anti Hemophilic Factors (AHFs)) to 720 persons and children suffering from hemophilia and medical assistance for CD/PND to 120 women)

### Implementing Agency:

Hemophilia Federation (India) (Reg. Under Societies Act 1860)

Address: A-128, Mohamadpur, Behind Bhikaji Kama Place

New Delhi-110066 India Phone-+91-11-26175791/4020 Fax-+91-11-26177209

www.hemophilia.in Email Id: ceo@hemophilia.in ; sanjeev.hemophilia@gmail.com

**Year of implementation:** 2014 to 2017

**Beneficiaries:** 916

729 for AHF (Anti Hemophilic Factor) medical kit and 187 for CD/PND assistance.

### TBG CSR: Hemophilia: Heal A Soul-2: AHF medicine distribution ( Project A)

Northern Region		Western Region		Eastern Region		Southern Region	
Chapter	No. of beneficiaries	Chapter	No. of beneficiaries	Chapter	No. of beneficiaries	Chapter	No. of beneficiaries
Agra	14	Goa	15	Durgapur	20	Bangalore	19
Chandigarh	20	Ahmedabad	10	Kolkata	24	Calicut	16
Dehradun	15	Aurangabad	15	Guwahati	20	Coimbatore	15
Delhi	25	Bhopal	15	Patna	15	Hyderabad	30
Jammu	15	Indore	9	Imphal	15	Madras	21
Lucknow	10	Jabalpur	12	Ranchi	10	Madurai	15
Ludhiana	16	Mumbai	22	Jamshedpur	10	Gangavathi	11
Srinagar	22	Nagpur	20	Kharagpur	10	Warrangal	10
Kupawara	8	Vadodara	10	Rourkela	10	Vijayawada	10
Varanasi	20	Dhule	10			Cuddapa	10
Kanpur	16	Pune	10			Angamaly	10
Jaipur	15					Mysore	15
Yamunanagar	10					Pondicherry	15
Bikaner	10					Tirunelveli	9
Mandi	10						
Udaipur	15						
Sub Total	241	Sub Total	148	Sub Total	134	Sub Total	206
<b>A. Total (AHF cases)</b>	<b>729</b>						

### TBG CSR: Hemophilia: Heal A Soul-2: CD/PND cases number ( Project B)

Mumbai (KEMS)		New Delhi (AIIMS)		Vellore (CMC)		Total	
CD	PND	CD	PND	CD	PND	CD	PND
60	35	6	2	51	33	117	70

**B. Total (CD/PND cases): 187** (131 have been actually covered till 30.09.2017. 56 more cases are expected to be cover in coming months). The impact assessment is to done for actual number of cases covered till the date of work order.

**Total nos of beneficiaries: A+B = 916**

**Evaluation Criteria:**

<b>SN</b>	<b>Particulars</b>	<b>Max Mark</b>	<b>Marks obtained</b>	<b>Evaluation basis</b>
<b>1</b>	Total number of Number of years' experience of the Agency	<b>5</b>		If date of registration is not prior 5 years from date of NIT: 0 marks. If date of registration is prior 5 years from date of NIT: 5 marks. Agency should submit the registration/incorporation certificate.
<b>2</b>	Past experience in carrying out Impact Assessment/ Evaluation in domain of CSR/ Sustainability / Community Deve. Projects of other corporate/PSU and/or deve. projects financed by any Central Ministry/ World Bank/ NABARD / other international donor (e.g., ADB, UN, etc)	<b>40</b>		(2.1 + 2.2)
<b>2.1</b>	Experience in term of Years	<b>20</b>		If experience is less than 3 years: 0 marks. If experience is betn 3 to 5 year: 10 marks If experience is 5 years or more: 20 mark. Agency should submit at least 1 work order/letter from client confirming its experience as a proof
<b>2.2</b>	Experience in term of number of project/assignment on assessment done	<b>20</b>		If agency has executed less than 3 nos of assignment on assessment: 0 marks. If agency has executed 3 or more number of assignment on assessment: 20 marks. Agency should submit Completion report/letter from client confirming that agency have experience of 3 years
<b>3</b>	<b>Experience of Key personnel</b>	<b>40</b>		(3.1+3.2)
<b>3.1</b>	Qualifications:	<b>20</b>		If team leader/head is not having at least PG qualification : 0 marks If team leader/head is having at least PG qualification : 20 marks Agency should submit the CV of key person and PG degree certificate copy as a proof
<b>3.2</b>	Relevant Experience in term of year	<b>20</b>		If team leader/head is not having at least 3 years' experience: 0 marks If team leader/head is having at 3 years' experience: 10 marks Agency should submit the declaration in support of this
<b>4</b>	<b>Financial Strength</b>	<b>15</b>		(4.1+4.2)
<b>4.1</b>	Average Annual Income (PAT) of last three Years whose audited report submitted as per SN 9 of Annexure D	<b>10</b>		If Less than Rs. 5 Lakhs : 0 Mark If in between Rs.5 lakh to 10 Lakhs: 5 Marks If more than 10 Lakhs: 10 Marks
<b>4.2</b>	Net Worth	<b>05</b>		Negative net worth: 0 Marks Positive net worth: 5 Mark
<b>5</b>	Total ( 1+2+3+4)	<b>100</b>		( 1+2+3+4)

**Agency would be evaluated as below:**

- i. Agency scoring "0" in any of the column of SN 2 and SN 3 above; it would be techno-commercially disqualified.
- ii. If total marks obtained by Agency is less than 50; it would be techno-commercially disqualified.
- iii. Bids of techno-commercially disqualified agency won't be considered for further process of tender.

# PRICE BID

Ref: NIT NO: TBG: HRM: CSR: A041 dated 05.10.2017

S.N.	Particular	All inclusive Amount (including all components except GST) (in Rs.)	GST (in Rs.)	Total (in Rs.)
		A	B	A+B
1	Impact Assessment of TBG/BHEL CSR Project "Heal A Soul 2"	Rs. _____  In words: _____ _____ _____	Rs. _____  In words: _____ _____ _____	Rs. _____  In words: _____ _____ _____

## Authorised Signatory

Sign:

Date:

Name:

Designation:

Seal/Stamp:

Name and Address Agency:

## Note:

- The price bid strictly should be in the prescribed format as above. Price are to be quoted in Indian currency i.e. INR.
- Letters/numbers should not be ambiguous. There should not be any discrepancy between price quoted in word and numerical value. In case of any discrepancy, prices in words would be taken for consideration for further course of actions.
- The price bid should be unconditional. If agency writes any condition/anticipation for execution of work in Price Bid, the bid will be disqualified and rejected accordingly.
- Price bid envelope no. 2 must contain only one document i.e. duly signed price bid. It should not contain any other documents.

**Details to be furnished by agency applying for Impact Assessment**

1. Name and address of the Agency
2. Registration number and Date of Registration ( copy of registration to be submitted)
3. Name of the Contact Person with designation
4. Address for communication with telephone number, fax, email.
5. Geographical Area/span of operation (mention districts in which impact assessment have been done earlier) . Please enclose supporting documents ( i.e. Work Order/ Letter from organization for whom Impact Assessment study done)
6. Brief introduction about agency, scope of works/services offered
7. Details of the Manpower proposed to be deployed for the assignment. Name and designation of leader/head leading the team of impact assessment ( for co-ordination for impact impact assessment study) to be given. Biodata of the concerned person to be enclosed. Another sheet as Annexure E may be added.

SN	Name of the Key Person	Designation in Organization	Role in job of impact assessment	Qualification/ Specialization	Experience in years	Major Tasks performed	CV/Profile (Y/N)

8. Details of experience of the Agency:  
Another sheet as Annexure F may be added.

S.N.	Name/particulars of assignment on impact assessment	Name of client	Start date	End Date	Major Tasks performed	Location of the project	Details attached at page no.

9. Financial Capacity:  
Financial statements consisting of Auditor's report, balance sheet, Profit & Loss Account Income and Expenditure Statement and Cash Flow Statement; ITR for the last 3 Financial Years (*copy to be attached*) and also specify the details as per table

Financial Year (audited report)	Net Worth (Positive/Negative)	Annual Income in Rs. lakhs	Annual Turnover in Rs.lakhs
2016-17			
2015-16			
2014-15			

10. Executive Summary of all the Impact Assessments work completed by the agency in the domain of Corporate Social Responsibility/ Sustainability Services/ Community Development Projects; financed by any Central Ministry/ World Bank/ NABARD and/or other international donor institution (e.g., ADB, EU etc) or Central / State PSE.

**Details of the Manpower proposed to be deployed for the assignment:**

Name of Team leader: \_\_\_\_\_

PG degree certificate enclosed: \_\_\_\_\_ ( yes / no )

S.N.	Name of the Key Person/expert	Designation in Organization	Role in job of impact assessment	Qualification/ Specialization	Experience in years	Major Tasks performed	CV/Profile (Y/N)
1			Team Leader				
2			Team Member 1				
3			Team Member 2				

**Sign, name and stamp of competent authority of agency**

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**Details of experience of the Agency:**

S.N.	Name/particulars of assignment on impact assessment (please enclose the copy of the report)	Name of client	Start date	End Date	Major Tasks performed	Location of the project	Details attached at page no.
1							

**Sign, name and stamp of competent authority of agency**

**DECLARATION CERTIFICATE (on letter head of agency)**

It is declared and certified that:

1. The information given above / in the proposal ref **NIT NO: TBG: HRM: CSR: A041 dated 05.10.2017** for Impact Assessment study of “Heal A Soul 2” CSR Project, submitted to BHEL, are TRUE to the best of my knowledge. The organization shall stand liable for any information given herewith which is later found to be false/ incorrect.
2. Our agency/organization/institution is interested to undertake the proposed evaluation /study.
3. I have gone through the terms and conditions and agree to abide by the same.
4. I am competent and authorized to sign this Declaration.
5. I have read and understood the terms and conditions mentioned in the said NIT. Notwithstanding anything mentioned in our bid, I hereby accept all the terms and conditions of the said tender. I confirm that the offer submitted by us confirming to all the terms and conditions mentioned in the tender document. I hereby undertake and confirm that I have understood the scope of services properly and, if selected, I shall carry out the job as mentioned in this tender accordingly.
6. There is no deviation wrt term/conditions/scope mentioned in the NIT.
7. I do hereby declare that there is no case with the Police/Court/Regulatory authorities against our proprietor/firm/partner/organization. Also our organization has not been suspended / delisted / blacklisted by any other Govt. Ministry/Department/Public Sector Undertaking/ Autonomous Body/Financial institution/Court. We also certify that neither our firm nor any of the partners are involved in any scam or disciplinary proceedings settled or pending adjudication. None of our officials are related to board member or employees of BHEL.
8. In case of selection of our organization for job of impact assessment, Shri/Smt. \_\_\_\_\_ Designation \_\_\_\_\_ would be the team leader for the job. His/her academic qualification is \_\_\_\_\_ and has more than \_\_\_\_ years of experience. He/She fulfils the criteria mentioned in clause d.3 of this NIT. In case, at the time of job of assessment, if he/she is unavailable (due to leave/resignation/out-station assignment or other reason), another official who fulfils the criteria mentioned in d.3 of this NIT would be deployed for the job.

This certificate is issued for selection of proposal for impact assessment of BHEL CSR Project “Heal a Soul 2”. All the information documents submitted by us are true to best of my knowledge.

Date:

Authorised Signatory

Place:

Sign:

Date:

Name:

Designation:

Seal/Stamp:

Name and Address Agency:

Sign and seal of representative of agency is must on each page.

## Check list

Sr.No.	Required Document	Envelope	Tick (v), If enclosed
1	Copy of NIT tender documents (all pages 1 to 12) (duly signed and stamped)	Techno- commercial Bid Envelope 1	
2	Audited Balance sheet & ITR for 3 financial years (duly signed and stamped)		
3	Work orders / letter from clients in support of qualification for techno-commercial bids (duly signed and stamped)		
4	PG certificate of Team Leader and CV/Profile of key person. (duly signed and stamped)		
5	Copy of PAN card of agency (duly signed and stamped)		
6	Copy of GST registration (duly signed and stamped)		
7	Copy of Agency's incorporation/ registration certificate (duly signed and stamped)		
8	Annexure D (Details of Agency ) (duly signed and stamped)		
9	Annexure E ( Detail of Manpower) (duly signed and stamped)		
10	Annexure F ( Detail of Experience of Agency) (duly signed and stamped)		
11	Annexure G Declaration Certificate (duly signed and stamped)		
12	Annexure C (unquoted price bid). This is to assure that agency has understood the format of price bid		
13	Information brochure/awards/any other letter/documents (optional; not mandatory) which agency wishes to submit in support of its credibility.		
14	Quoted Price Bid as per Annexure C (duly signed and stamped)	Price Bid Envelope 2	
15	Tender Bid	Envelope 3 (containing two separate envelope 1 & 2)	