

Request for quotation for conducting Impact Assessment Study of Corporate Social Responsibility initiatives of BHEL,Trichy.

Bharat Heavy Electricals Limited (BHEL) a Maharatna PSU, India’s largest Engineering and manufacturing Company 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. **Trichy Unit of BHEL** intends to conduct the third party impact assessment study of Corporate Social Responsibility Initiatives undertaken during 2010-11, 2011-12,2012-13(Annexure-E)under the guidelines issued by Department of Public Enterprises, Government of India.

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 negative impacts (Socio-economic, Environment, Policy, Technology,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 may cover the following :

- i/ Objective of the Project.
- ii/ Whether objective met. If yes, then to what extent
- iii/ Outcome of the project are based on the conclusion of Baseline Indicators
- iv/ Expected impacts in the long run
- v/ Coverage of other points as mentioned in the Objectives Tabulated at point a) above.

vi/ Intangible benefits derived from completed projects.

c) Methodology, Coverage and Sampling Plan

- i.) The selected agency has to visit the project site(s) and interact with various stakeholders (beneficiaries, project implementation agency and their representatives, BHEL's CSR co-coordinators, public authorities etc.) for the purpose of study.
- ii.) Agency has to submit a brief research proposal, describing the proposed research methodology to be adopted including methods and tools to be used for data collection and interpretation. The proposal must have the timelines and the manpower requirements defined for the study, keeping in view geographical distribution of samples.

d) Who can apply?

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

- i.) The Agency may be a Government Undertaking / Registered Company / Registered Consultancy Firm / Registered Non-Government Organization / Academic Institution, specializing in conducting Impact Assessment.
- ii.) The Agency must have a minimum of three years' experience of carrying out Impact Assessment/ Monitoring & Evaluation work 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.

iii.) Key Persons involved in the project should have post graduate qualification containing Social Research/research projects as part of the curriculum and must have experience of having conducted impact assessment for a minimum of three Projects.

e) Time Frame

The total exercise has to be completed within a period of 45 days from the date of start of work and the first draft report should be submitted within 30 days of start of work. Based on the comments received from BHEL, if any, the agency shall submit the final report within 7 days of final comments by BHEL details as per annexure-C

f) How to Apply?

Interested and eligible agencies are invited to submit two part Tender bid with all required documents a) Technical bid through Annexure-A and Price bid through Annexure B. Both these bids need to be wax sealed separately and these two bids are to be placed in a separate envelope.

g) Selection Process and Methodology:

Based on the documents submitted, the technical & financial capability of the participating agencies shall be evaluated as per evaluation methodology indicated in Annexure-D. The agencies fulfilling the experience criteria and securing more than 50 marks alone will be considered suitable for Price bid Opening.

h) Arbitration:

Any disputes on both sides to be referred to General Manager /HR of BHEL,Trichy for settlement who will be the final authority.

i) Security Deposit:

Security Deposit of 10% of the tender value should be furnished before the commencement of the work in the form of Bank guarantee/DD/National Saving Certificates / FDR from any scheduled bank.

j) Agreement

A formal agreement in twenty rupees non judicial stamp paper outlining the roles & responsibilities of the agency shall be signed with the selected, incorporating the accepted conditions, payment terms, indemnity clause etc.

k) Key Dates:

Prebid Meeting : 07-3-2014 at 2.30 PM
Last date for submission of Tender :15.03.2014 at 2.00 PM
Opening of Techno commercial bid : 15.03.2014 at 2.30 PM
Opening of Price bid :Will be intimated later

l) Address for Communication / further clarification

SDGM/Administration, Bharat Heavy Electricals Limited, Tiruchirappalli -620 014
kmurali@bheltry.co.in
Phone nos: 0431-2577272, 2577103

Annexure C

Time Schedule:

The entire exercise has to be completed within a period of maximum 45 days from the date of start of Impact Assessment.

S. No.	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 1 st Draft to BHEL	
7	Preparation, submission and acceptance of final report after receiving the comments from BHEL	

Payment terms:

The payment shall be made to the selected agency through EFT, as per the following norms:

S.No.	Milestone	% of fund to be released
1	Submission of Baseline/ Impact Assessment Methodology and acceptance of the same by BHEL	10
2	Submission and acceptance of Final Report by BHEL	90%

Annexure- A

Details to be furnished by agency applying for Impact Assessment

A. General Information:

1. Name of the Agency
2. Registration number and Date of Registration (copy / proof to be attached)
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 projects undertaken)
6. Brief introduction about agency and the services offered
7. Details of the Manpower proposed to be deployed for the assignment

Sl No	Name of the Key Person(s) /Expert(s)	Qualification/ Specialization(proof attached)	Experience in years	Major Tasks performed	CV/Profile attached (Y/N)

8. Details of experience of the Agency:

Sl N	Name of the assignment (Impact Assessment)	Name of the client	Start Date	End Date	Major Tasks Performed	Location of the project	Details attached (at page no.)
a)	Corporate Social Responsibility/ Sustainability Services/ Community Development Projects:						
b)	Wildlife Protection/Environment and Ecology/Rural Development/Entrepreneurship and Livelihood						
c)	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						

9. Financial Capacity:

Financial statements consisting of Auditor's report, balancesheet, Profit & Loss Account Income & Expenditure Statement and Cash Flow Statement for the last 3 Financial Years and also specific details as per table

Sl.No	Financial Year	Net Worth(Positive / Negative)	Annual Turnover

10. Executive Summary of all the Impact Assessments/Monitoring & Evaluation 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.

Annexure A (Sheet 2 of 2)

11. Declaration signed by agency (Refer sample declaration form)

DECLARATION (Sample)

It is certified that:

- ❖ The information given above / in the proposal No. _____ dated _____ for _____, submitted to BHEL, is 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.
- ❖ Our agency/organization/institution is interested to undertake the proposed evaluation/study.
- ❖ We have gone through the terms and conditions and agree to abide by the same.
- ❖ I am competent/authorized to sign this Declaration.

Date:

Authorized Signatory

Place:

Name:

Seal of the Organization:

Designation:

Annexure-B

To be placed in a separate envelope duly superscripting the “BHEL-CSR Impact Study, Name of the Agency and Cost Estimates” on the left hand corner of the envelop)

Sl.No	Project Year	Amount	Tax	Total
1	2010-11			
2	2011-12			
3	2012-13			
	Total			=1+2+3

LI agency will be decided based on the total of all three years as package

Evaluation Criteria for the proposal submitted against Expression of Interest for Base Line Survey and Impact Assessment Study of CSR Initiatives of BHEL:

Criteria	Total Marks	Marking Criteria
		Agency getting zero marks on criteria (A. i, ii, iii, B. I, ii, iii and C. i, ii) shall be rejected straight away and shall not be evaluated further)
A		45
Past experience of the Agency		
i.	Number of years' experience of the Agency submitting the proposal	05
		Less than 5 Years: 0 Marks 5-10 years: 03 Marks More than 10 years: 05 Marks
ii.	Past experience in carrying out Impact Assessment Monitoring & Evaluation work in domain of Corporate Social Responsibility/ Sustainability Services/ Community Development Projects	10
		No Experience: 0 Marks Upto 5 similar work: 6 Marks (1.2 marks for each work). More than 5 Similar Work: 1 Mark additional mark for each such assignment
iii.	Past experience in carrying out Impact Assessment Monitoring & Evaluation work in domain of a) Wildlife Protection b) Environment and Ecology c) Rural Development d) Entrepreneurship and Livelihood	15
		03 Marks Each: for at least one on-going or completed project assigned to the agency Copy of Work Order from client to be furnished as documentary proof.
iv.	Past experience in carrying out Impact Assessment/Monitoring & Evaluation work in 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	10
		Upto 5 similar work: 6 Marks (1.2 marks for each work). More than 5 Similar Work: 1 Mark additional mark for each such assignment
v.	On time Completion of previous assignments	05
		03 Marks: If any of the assignment in last 02 years has been successfully completed on time Full Marks: If at least 02 of the assignments in last 02 years have been successfully completed on time

B			40
Experience of Key personnel			
i.	Qualifications	15	Less than the Qualification Level as mentioned para 'd' of the tender document: 0 Marks Qualification Level as mentioned in Annexure-A: 10 Marks One mark each for additional qualifications of the Lead Researcher, Economist, CSR Expert and Environmental Expert
ii.	Relevant Experience	20	Less than the experience as mentioned para 'd' of the tender document: 0 Marks Experience mentioned para 'd' of the tender document: 15 Marks One mark each for additional years of the Lead Researcher, Economist, CSR Expert and Environmental Expert
iii.	Number of years of service in the organization	05	30% of the project staff having less than one year of service current organization: 0 Marks 50% of the project staff having more than 2 years of service in current organization: full Marks
C Financial Strength			15
i.	Average Annual Income of last three years	10	Less than 5 Lakhs : 0 Marks 6 lakhs to 10 Lakhs : 5 More than 10 Lakhs: 10 Marks
ii.	Net Worth	5	Negative net worth: 0 Marks Positive net worth: 5 Marks

CSR Projects in and around Trichy

a) CSR Projects for the year 2010-11

Sl.No	Project Title	WORK DONE
1	To build up toilet facilities at Government ITI, Trichy	Constructed one gent's toilet and one ladies toilet.
2	To build up compound wall (65 meter length) in Govt. SC & ST welfare Middle School at Cholamadevi Village, Trichy	Constructed compound wall measuring 80 Meters in length. Refurbished the floor of two classrooms. Cement floor provided between class rooms and compound wall.
3	To adopt Thiruvalluvar School at Narikuravar colony and provide basic infrastructure and upgrade.	Constructed 6 rooms i.e.: 4 class rooms, one room for Headmaster and other one for office.
4	Providing vocational support to downtrodden women in nearby Panchayats	Training in tailoring given to 28 unemployed women belonging to below poverty line family and donated one sewing machines each. Computer training provided to 62 unemployed women belonging to below poverty line family and certificates issued.
5	To provide School uniforms, 3 Steel Amirah's, 20 Steel Benches and 20 steel desks in Govt. Panchayat Union Ele. School at Police Colony, Navalpattu Village, Trichy	Donated furniture to schools and 231 sets of uniforms to 231 students.
6	To facilitate transport of children for Arivalayam School	Procured and donated a new bus.
7	To provide drinking water facility to the four Schools.	1} Provided twobore wells with motor at Alagiamanavalam Panchayat for school and village. 2} Built compound wall. Renovated toilets at PU Elementary School at Ellakudi village. 3} Renovated two toilets and provided water facility at Govt. Boys SC/ST Welfare school at Kattur. 4} Braille books donated to Govt. Girls Higher Secondary School at Thenur, Trichy.
8	To adopt a school and provide all infrastructural facilities and toilet facilities	Constructed 6 class rooms i.e.: 3 class rooms in ground floor and 3 class rooms in first floor and also stair case.

b) CSR Projects for the year 2011-12

Sl.No	Name of Project and Budget of Project	Activity status
1	To sponsor feeding cost of one animal (IndianElephant) in Arignar Anna Zoological Park, Chennai.	Decided to sponsor feeding cost of one Indian elephant (named Saravanan) for one year.DD handed over to the Director, Vandaloor Zoological Park in Chennai on 17.12.2011.
2	To construct Compound wall of 750 mts in length. at Govt. ITI, Thiruverumbur.	Work completed.
3	To construct Primary health centre, School building (balvadi) and Toilets at Valavanthankottai village, Trichy.	All the work completed.
4	To construct a Community hall with all facilities at Kumaresapuram Village. Budget :	Completed.
5	To provide furniture and other facilities to Panchayat Union Middle School, Navaloor Kutapattu, Manikandam.	8 sets of Table and Chair, 5 steel cupboards, Public Address system, Sports materials, and noon meal plates were purchased items and handed over to the school.
6	To provide Toilet facility at St. Mary's High School, Pathalapettai Village.	Work completed.
7	To provide furniture to Govt. Arts College, Trichy-620022.	120 sets of steel benches and desks, 8 chairs and 4 steel cupboards were purchased through our purchase department and issued to the college.
8	To create employability to unemployed people from below poverty line community.	The following short term courses 1} Diploma course in Computer Hardware Technology. 2} Diploma course in Air conditioning & Refrigeration. 3} Diploma course in Electronic Servicing and Maintenance Technology. 4} Certificate programme in Mobile Phone Servicing given to 120 unemployed youth through Trichirappalli Regional Engineering College - Science & Technology Entrepreneurs Park, Trichy-15.

9	Scholarship to students from below poverty line community.	Scholarship: News item published in dailies and Inter-net for receiving applications and 513 applications received. A committee was formed for selection of beneficiaries with approval of Unit Head. Committee decided to provide Rs.10000/- per year for B.E, B.Tech and Medical students. Rs.5000/- for Diploma in Engineering students. Rs.1000/- for class X, XI, XII students. 73 students selected in B.E & B.Tech, one student selected in BDS, 35 students selected in Diploma in Engineering, 40 students selected in class XII, 51 students selected in class XI and 46 students selected in class X, totaling 246 students throughout Tamilnadu state.
10	To conduct Medical camps in nearby villages.	F five Medical camps were conducted.
11	13.2} Repair works in infrastructure in Elementary School at Enam Krishnasamuthiram.	Repair work and colour washing completed and handed over.
12	13.3} To provide Toilet facility at Neikunam Village, Papakurichi, Kattur and drinking water facility at Chatiram Ammapalayam. .	Drinking water facility at Chatiram ammapalayam completed. Neikunam village toilets building completed.
13	Grant to Arivalayam. .	Cheque issued on 06.09.11.

C) CSR Projects for the year 2012-13

Sl. No.	Project Name	Physical Status
	UNIT LEVEL PROJECTS	
1	Adoption of a remote and underdeveloped village	Adopted three villages i.e.: Devarayaneri, Valayur and Chempulichanpatti and decided to execute the work through concern BDOs. Letter sent to collector. Received the estimates from BDO of Pachamalai and Devarayanery. Preparation of agreements under progress. Provided school uniforms to Govt. TRB School at Chempulichanpatti, Pachamalai Hills.
2	Sponsor feeding cost of animals at govt zoo, vandalur	Sponsored four animals (An Indian Elephant, Leopard, Black Duck and Wild Boar) in Arignar Anna Zoological Park, Chennai, and Vandalur.

3	Miscellaneous Activities: School uniforms and bags, Library books to BPL students and material to lepers' home.	School uniforms and Bags distributed to Arivalayam, Thiruvalluvar Elementary School-Devarayanery and Vivekananda Elementary School. School Bags, Library Books and Sports material distributed to Panchayat Union Middle School, Thiruverumbur North and Somarsampettai. Library books distributed to Govt. ITI, Thiruverumbur. Cloth materials distributed to the inmates of Govt. Leper's home, Puthukottai.
3.1	Supporting to Basic Education by covering Std X, XI, XII Students from BPL family	A Committee formed with approval of Unit head. Committee decided to give publication and publication given in dailies and BHEL Web-Site. 452 applications received in this category. Committee decided Rs.2000/- scholarship for this category. 396 students selected and cheques were distributed.
3.2	Supporting to Technical Skill Development by covering ITI and Diploma Students from BPL family.	A Committee formed with approval of Unit head. Committee decided to give publication and publication given in dailies and BHEL Web-Site. 382 applications received. Committee decided Rs.3000/- for ITI and Rs.5000/- scholarship for Diploma students. 152 students selected from ITI and 230 students selected from Diploma and cheques were distributed.
3.3	Supporting to Advanced Technical Education by covering B.E and B.Tech Students from BPL family.	A Committee formed with approval of Unit head. Committee decided to give publication and publication given in dailies and BHEL Web-Site. 601 applications received. Committee decided Rs.10000/- scholarship for this category. 200 students selected and cheques were distributed.
4	Financial assistance to differently abled children of arivalayam	Cheque handed over to Arivalayam.
5	Create employability to unemployed from BPL community	Training given to 250 unemployed from Below Poverty Line families through TREC-STEP (Tiruchirappalli Regional Engineering College Science and Technology Entrepreneurs Park), Tiruchirappalli-15. Provided training in tailoring for 60 women from BPL families in nearby Panchayats and give four months training at BHEL Women's Welfare Centre and provided one sewing machine each on completion of training.

6	Provide a paper cup making machine for arivalayam	Provided a Paper cup making machine, Paper bag making machine and other facilities to Arivalayam.
7	Conduct medical camps in villages, schools	Medical camps conducted at Manikandam, Asoor, Devarayaneri and Chempulichanpatti village at Pachamalai hills. Identification of blood group for 5000 schools students done.
8	Promotion of art and culture activities	In connection with Silver Jubilee of South Zone Cultural Centre, Tanjore arranged Cultural Programmes for three days at BHEL stadium.
9	Promotion of national level/state level sports	a) Sponsored CBSE Cluster V Football match. b) Sponsored a wooden sports ground in Anna Stadium, Tiruchirappalli. c) Cosponsored of ITF Men's features Tennis in Trichy.
10	Miscellaneous (small) projects	1} Provided a Blood testing equipment for Public Health Centre at EB road, Trichy. 2} Provided utensils and Submergible Water pump for Govt. Leper's Home, Puthukottai. 3} Bulletin and Booklet on eye care distributed to all employees of BHEL, Trichy. 4} Provided support for education and donated to Kailasapuram Parish, Trichy. 5} Provided 10 set of Batteries for Tri wheeler Motor Cycles for Physically Challenged from Below Poverty Line families. 6} Sponsored Marriage & Bangle wearing ceremony expenses for Visually challenged. Provided incinerator for Girl students through Bharathidasan University.