

BOSNIA AND HERZEGOVINA
FEDERATION OF BOSNIA AND HERZEGOVINA
ADDITIONAL FINANCING FOR ENERGY EFFICIENCY PROJECT–ID P165405

TERMS OF REFERENCES

for Training Provider

for Provision of Services related to design and logistical support for implementation of the staff training plan for the eligible employees of the Project Implementation Unit of the Federal Ministry of Physical Planning and the Federal Ministry of Physical Planning

Ref. No. BEEPAF-P165405-CQ-25-CS-20-FBIH

1. Background

The Government of Bosnia and Herzegovina (BH) has recognized the importance of energy efficiency (EE) to support sustainable economic growth and move towards EU accession and has received financing for the Additional Financing for the Bosnia and Herzegovina Energy Efficiency Project (BEEP) from the International Bank for Reconstruction and Development (IBRD) credit funds. The project development objective is to demonstrate the benefits of energy efficiency improvements in public sector buildings and support the development of scalable energy efficiency financing models. The AF BEEP became effective March 2020.

The project is supported by a US\$32 million IBRD credit for BH, which is made available to the two entities, with US\$ 19.23 million allocated to the Federation of Bosnia and Herzegovina (FBH). The project consists of three components implemented separately in each entity:

Component 1: Energy efficiency investments in public facilities

Component 2: Support for the development of scalable financing mechanisms and capacity building

Component 3: Project Management

The project implementation unit (PIU) established within the Ministry of Spatial Planning of the Federation of Bosnia and Herzegovina (FMPP) is responsible for the preparation, coordination, management and implementation of the project in the Federation of Bosnia and Herzegovina,

including procurement, contracting, and payments of all goods, works and services related to the project.

This Terms of Reference (ToR) defines the nature and detailed scope of an assignment for Training Provider to provide the supporting services related to the design and provision of logistical support for the implementation of the FMPU and the PIU BEEP's staff training plan.

The Training Provider will coordinate activities with, report to and work under the direction of the PIU Project Manager/Coordinator.

Scope of Work for the Training Provider

Under this assignment the Training Provider has the responsibility to, in coordination and under direction of the PIU Program Manager / Coordinator, design the PIU BEEP's staff training plan that would provide opportunities for personal and professional development of the following staff:

- Secretary of State responsible for: (i) the budget monitoring (use of budgetary funds) and preparation of quarterly budget plan proposals as well as reports on the use of budgetary funds by certain items; (ii) preparation of quarterly and annual programmes and reporting on the work of the Ministry; (iii) Implementation of the work programme of the Ministry; and (iv) the use of financial, material and human resources as assigned
- Head of EE Department responsible for: (i) coordinating and monitoring the activities related to energy efficiency in buildings in the Federation of Bosnia and Herzegovina; (ii) monitoring and implementing the activities related to energy efficiency in buildings in the Federation of Bosnia and Herzegovina, stemming from EU commitments such as the Energy Community and the Energy Charter Treaty; (iii) participates in drafting of primary and secondary legislation related to energy efficiency in buildings; (iv) provides law enforcement and other legislation-related instructions in the field of energy efficiency in buildings; (v) monitoring and coordinating the harmonization of energy efficiency building activities related to the implementation of EU directives along with cantonal line ministries; (vi) preparing analysis plans, reports and information on energy efficiency in buildings in the Federation of Bosnia and Herzegovina.
- BEEP Team Leader responsible for: (i) coordinating and monitoring the work of the PIU, which includes overall and day-to-day management and coordination of project implementation activities, including but not limited to: overall project management on a day-to-day basis; administering, coordinating and monitoring all project activities, including EE investment project cycles (e.g. selection buildings, preparation and implementation of investments) and technical assistance activities (e.g. preparation of terms of reference, review of outputs delivered, etc.); coordinating the work of the PIU with the Ministry of Physical Planning and the World Bank; preparing necessary documentation for approval/ consultation with the Ministry in line with the procedures defined in the POM; and ensuring implementation of the Project in accordance with the relevant agreements and project documents; (ii) monitoring the dynamics and efficiency of Project execution; ensures regular monitoring of the status of project activities, including through: the preparation and updating of implementation/work plans and

schedules, weekly status update discussions with each PIU staff, regular disbursement projections (in coordination with the Financial Management Specialist), review and finalization of quarterly reports on status of procurement and contract-management related activities and monitoring of defined service standards (in coordination with the Procurement Specialist), coordination and maintenance of an updated monitoring and evaluation framework and related indicators (with input from other PIU staff), etc.; (iii) providing regular and periodic progress reports to the Ministry (on at least monthly basis), Project Steering Committee (on a quarterly basis), World Bank (on a quarterly to semi-annual basis, or more frequent if needed) and Government of FBiH (as requested); (iv) supervising the work of PIU consultants engaged within the Project, including overseeing contract delivery performance, reviewing outputs prepared, providing performance feedback to PIU staff and the Ministry, as regulated through the PIU-Ministry Protocol, and coordinating the work of consultants in accordance with the overall project implementation plan; (iv) monitoring, following and applying the POM, relevant project protocols and service standards for procurement and contract -related activities and complaints, in coordination with other PIU staff; (v) provide coordination with the Project Steering Board (PSC), including preparation of relevant documents and progress reports; provides assistance and advice to the PSC on establishing policies, strategies and goals to ensure the achievement of project goals and requirements;

- BEEP Procurement Specialist responsible for: (i) following the World Bank Guidelines for procurement of goods, works, services, World Bank Consultant Guidelines and other relevant laws for all items financed through the loan, using standard World Bank documentation; (ii) establishing and maintaining in the PIU comprehensive database of documents received from consultants, contractors and suppliers; (iii) preparing updates and amendments of the Project Procurement Plan (PP), concur and clear them with the PIU Team Leader (TL) for no objection by the World Bank, and ensure disclosure and publication of updated PP on the local website; (iv) preparing general procurement notes (GPN), special procurement notes (SPN) and other necessary tender documentation (bidding documents (BD's), request for proposals (RFP's), invitation to quotes, draft contracts etc.) for the project, coordinate their clearance with the Bank via the TL, and ensure disclosure and publication of SPN and request for expressions of interest, contract awards and other relevant documents on local website; (v) preparing the administrative-commercial parts of the bidding documents for procurement of goods, works and services based on draft terms of references (TORs) and specifications and quantities provided by the project technical staff, and transmit those documents – after clearance by the TL – to the World Bank for review and/or no objection (in case of prior review as indicated in the PP); (vi) preparing at least quarterly status reports for review to the TL and subsequently the World Bank on all upcoming and ongoing procurements and contracts, including but not limited to status and timelines with respect to decision-making milestones as per the protocol for the procurement and contract management-related decision-making chain and the POM; provide procurement and contract management related input to the semi-annual project progress reports, including a summary of procurement activities, status, issues encountered and other aspects, as requested by and agreed with the World Bank; (vi) monitoring receipt of bids, quotations and proposals and ensure their safekeeping until public opening, until contract award and/or return of documents, as needed; (vii) leading regular training on procurement and contract management-related aspects to all

staff and stakeholders involved, including to Ministry staff, members of tender/ evaluation committees, project beneficiaries on procurement processes and principles, bid opening procedures, contract management, etc. (viii) participating in contract negotiations and facilitate the signing procedure, in coordination with technical and financial specialists; (ix) drawing up contracts for approval and signature by those individuals authorized to sign on behalf of the Ministry, ensuring transmission to the World Bank of draft contracts requiring prior approval; (x) general contract administration and monitoring, in close coordination with the TL, including but not limited to: monitoring contract relationship, addressing related problems, incorporating necessary changes or modifications in the contract in close coordination with technical specialists and the TL, ensuring both parties meet or exceed each other's expectations, and actively interacting with the contractor to achieve the contract's objective(s)

- BEEP Financial Specialist responsible for: (i) sound financial management of the funds allocated to the PIU; (ii) managing all financial transactions (payment of commitments toward suppliers, consultants, payment of operational expenses); (iii) ensuring that all financial transactions are carried out in accordance with existing laws, authorizes travel and other expenses of the PIU staff; (iv) preparing financial reports for FBH Ministry of Finance (monthly, quarterly, semi-annual and annual); (v) preparing reports for Tax Administration and other FBH institutions; (vi) preparing quarterly reports for the World Bank and annual report for the World Bank; (vii) preparing documentation for auditing needs (public sector and international auditing); (viii) preparing Project Annual Budget and follows up realization together with the Project Coordinator and the Project Manager (based on project papers);
- BEEP Technical Experts responsible for (i) supporting the process for selecting buildings based on the results of the energy audits, and providing technical input/summary reports for consideration by the PIU management; (ii) supporting the procurement process from the technical side for the selection of consultancy companies providing combined services for preliminary and detailed energy audits, technical monitoring and evaluation (before and after implementation of subprojects), technical design and supervision activities related to selected subprojects; (iii) managing, supervising and coordinating technical services provided by the consultant companies; (iv) supporting the procurement process from the technical side for the selection of construction companies; (v) leading and coordinating the PIU's supervision of subproject implementation, (vi) providing regular progress updates to the Team Leader/ Ministry focal point, including on implementation progress achieved at each subproject site, technical/financial issues, technical changes, compliance with the implementation plan, etc.; (vii) supporting development and maintenance a simple database for systematic monitoring and evaluation of technical indicators related to the implementation of subprojects, as reflected in the Operational Manual of the project; (viii) preparing, coordinating, reviewing and managing technical assistance and capacity building activities supported under Component 2, including in particular: coordinating design and implementation of the on-the-job training program for municipal energy managers and for the issuance of energy labels for public buildings; identifying and initiating other technical assistance activities and trainings needed; providing technical input (e.g. results achieved) and assistance for the information and promotion campaigns; this will also include support in the procurement process of related consultancy assignments and active management of

the selected consultants; (ix) leading, together with the other technical experts and the team leader, preparation and execution of training to local energy service providers to share lessons learned under BEEP and its AF, including deficiencies and mistakes in energy audits and designs, issues during contract implementation, etc.; this includes compilation of relevant lessons learned, preparation of training agenda and list of invitees, preparation of relevant training material, and coordination with World Bank (through the Team leader); (x) assisting in the preparation of semi-annual progress reports to the World Bank, updated works progress reports for each building before missions and at the request of the Bank team with comprehensive information (e.g. status of works, changes at different stages of preparation and implementation in terms of costs and scope of work, issues encountered during preparation and implementation, solutions identified and actions agreed, etc.), and specific reports and information for the FBH Government, as requested;

- BEEP Contract Management Specialist responsible for: (i) ensuring that contract management processes are carried out in compliance with the Financing Agreement, World Bank's Procurement Regulations for Investment Project Financing (IPF) Borrowers 'Procurement in IPF, Goods, Works, Non-Consulting, and Consulting Services' (Procurement Regulations) dated July 2016, revised November 2017, under the 'New Procurement Framework (NPF) and their associated Regulations; as well as Protocol of the Federal Ministry of Physical Planning for the processes of Procurement and Contract Management (Protocol); (ii) preparing the Contract Management Plan for the contracts identified in the Project Procurement Strategy for Development (PPSD) in accordance with Procurement Regulations; (iii) contract administration and monitoring to ensure that it abides the stipulated standards, procedures and planned timetable (monitoring the progress of contracts implementation, addressing related problems, incorporating necessary changes or modifications in the contract, ensuring both parties meet or exceed each other's expectations, and actively interacting with the contractor to achieve the contract's objective(s)); (iv) systematic monitoring of the performance of the contractual obligations of each of the contracting parties and the progress of the contract, and that, for the entire duration of the contract, each of the contracting parties is instructed on their responsibilities and obligations and that perform them in a manner stipulated by contract; (v) monitoring and control of the performance of the contracted terms and conditions (administrative, technical and financial) i.e if the contractual deadlines/milestones are met, deliverables submitted timely and within the contracted price; (vi) following and control that all approval/opinions required by the contract and Protocol obtained timely by the relevant person (technical expert, consultant for supervision etc.); (vii) permanent monitoring of the execution of contracted obligations, i.e. execution of contracted services in accordance with and in the manner provided for in the Terms of references, submission of reports in form, content and time frames as contracted; (viii) in the case of potential risks related to administrative, operational, technical, financial issues, reporting etc. an early detection / warning system will be used to prevent their development and to ensure fulfillment of obligations timely and as contracted. This includes established communication channels between involved stakeholders, agreed reporting requirements by contracting parties, regular exchange of information between the contracting parties through various channels (e.g. email, phone, meetings, etc.); (ix) in case of unforeseen circumstances (i.e. any unpredicted or not

contracted conditions, for example any unexpected/needed activity(ies), time extension, unforeseen works etc.) outside of the scope of the contract proposing of the corrective measures that may be agreed in line with the relevant contract management provisions described in the Protocol, Contract Management Plan and procedures agreed with the World Bank; (xi) establishing and maintaining in the PIU comprehensive contract management database of documents received from consultants, contractors and suppliers;

- BEEP Administrative Assistant responsible for: (i) overall administrative matters of the PIU; (ii) recording documentations into internal protocol ledger and forwarding it to the related person; (iii) keeping a centralized evidence of all project documents; (iv) performing electronic archiving of documents; (v) managing the work records for employees under the Project (attendance at work, absence on the basis of annual vacations, official travels etc); (vi) organizing from the administrative point of view (but not limited to) meetings, minutes of meetings, workshops and conferences; (vii) translates simple documents and interpret from English into local language and from local into English language, as needed;

Key responsibilities of the Training Provider hired under this Terms of References include:

I. Design of the FMPU and the PIU BEEP staff training plan

1. Through a review of the existing documentation and interviews with the staff, get acquainted with the job descriptions and skills and knowledge of the above enlisted employees to perform their tasks in accordance to expected standards.
2. In close cooperation with the PIU Program Manager / Coordinator and in consultation with the above enlisted staff perform the training needs analysis.
3. Based on the training needs analysis, agreed topics, available training budget, and in coordination with the PIU Program Manager/Coordinator, identify the preliminary list of the available trainings (in the country and abroad) that could be offered to the FMPU and the PIU BEEP staff. The list of trainings that will be offered to the FMPU and the PIU BEEP staff should comply with the following criteria:
 - a. The training must be directly related to the staff's job description and work tasks
 - b. The training must address identified gaps in skills and knowledge of the staff
 - c. The training should be relevant for the potential improvement of the staff's performance

The Training Provider will update the list of available trainings on a monthly basis and submit it to the PIU Program Manager/Coordinator.

4. Upon approval of the training list of available trainings by the PIU Program Manager/Coordinator, the Training Provider will develop an annual training plan for the FMPU and the PIU BEEP staff.
5. The staff training plan will contain at the minimum following elements:
 - a. For each of the above enlisted positions defined annual budget for personal development
 - b. The list of eligible trainings for each position
 - c. The period within which the employee must use available funds for personal training

- d. The manner and procedure of approving training requests
6. Any other tasks as reasonably requested by the Project Manager/Coordinator.

II. Provision of logistical support for the implementation of the staff training plan

1. Upon receipt of an individual training request, approved by the PIU Program Manager/Coordinator, the Training Provider initiates the process of registering of the FMPU and PIU BEEP staff for the requested training.
2. If registration is approved, the Training Provider will proceed with the logistical support to the FMPU and PIU BEEP staff related to organization of their transportation and accommodation.

Duration of Contract

Expected duration of the contract for the Training Provider is 12 months during the period from January 2022 to January 2023.

Qualification requirements and basis for evaluation

The Consultant should be a qualified firm or joint venture of firms (up to 3 companies for a joint venture) that have demonstrated experience in providing services in area of adults' education and training. The firm must propose a team capable of successfully carrying out all aspects of the ToR with in-depth experience in organizing adult educational and training programs. The Consultant shall demonstrate their capability to mobilize enough skilled staff for carrying out the project activities within the allocated timeframe as part of the proposal by including in the technical proposal, the Curriculum Vitae of the proposed key staff, including educational background, relevant working experience in similar projects, and by confirming their availability during the period of the contract.

Interested consultants must provide information indicating that they are qualified to perform the services by fulfilling following requirements:

- Company information: name, registration, address, telephone number, facsimile number, year of establishment, contact person for the project, fields of expertise;
- Proof that the company is legally registered for the adults education;
- Minimum of 10 years of successful provision of services in area of the adults education;
- Confirmation on no obligations relating to the payment of direct and indirect taxes in accordance with the relevant laws of Bosnia and Herzegovina (may not be older than three (3) months) or with the relevant law of the country from the EOI submitter;
- Details of experience in organizing a minimum twenty (20) adults' educational programs in last five (5) years, including value the programs, number of participants, duration of education program, and type of educational program provided;

- Curricula Vitae (short version, specifying experience in organization and delivery of adults' educational program, four (4) CVs of key personnel who will be working on the assignment(s) with minimum:
 - Team Leader, responsible for managing/overseeing the entire consultancy contract implementation; University degree (Master's equivalent); minimum ten (10) years of experience in relevant field, including experience in management of similar assignments;
 - At least two (2) additional employees with (5) years of work experience in relevant field;
 - One (1) administrative assistant (support personnel, CV not required)

Training Provider's Reporting Obligations

The Training Provider will submit monthly report to the Project Implementation Unit of the Ministry of Spatial Planning of the Federation of Bosnia and Herzegovina within 5 days after each month expires with description of the realized activities and the list/specification of the reimbursable costs.

Any deliverables produced – training needs analysis, list of available trainings, staff training plan, report on the completed trainings / education.

For the purpose of payments for reimbursable costs as predicted by the Training Provider will submit along with the monthly report related proof and appropriate supporting documents/receipts, invoices etc.