

Standard
Procurement Documents

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**Terms of Reference Template**

1st Edition

December 2020

insert

project logo

(if existing)

*[insert procuring entity / client]*

**Terms of Reference for**

**Consulting Services**

for

*[insert procurement title]*

Ref No:*[insert ref #]*

 **Submission date**

**Foreword**

These terms of reference have been prepared by *[name of procuring entity]* and are based on the 1st edition of the IFAD-issued standard procurement documents template for terms of reference available at [www.ifad.org/project-procurement](http://www.ifad.org/project-procurement) This document is to be used for the procurement of services in projects financed by IFAD.

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**Terms of Reference (TOR)**

*[Title: briefly describe the required services in one or two lines]*

**1. Client**

The client for this assignment is *[state client / procuring entity]*.

**2. Country background**

*[Provide information on the situation in the country to the degree that it is relevant to the proposed project. This includes economic, social factors as well as recent developments that may affect the overall project or the assignment for which these TOR are issued.]*

**3. Background on project**

*[Include information on the technical and financing background of the project with a summary description of the different components of the project.]*

**4. Background of the assignment**

*[Summarize main features of the project/assignment and the tasks already completed, if applicable.]*

*[Describe how work carried out under this assignment is linked and sequenced with work done by other consultants.]*

*[Be explicit about required coordination with other consultants, contractors or government institutions.]*

*[Identify other donors that may be involved in the project or could have an impact on the assignment.]*

**5. Overall objectives**

*[Include information on the overall objectives of the project. These are stated in the project design document.]*

**6. Objectives of the assignment**

*[Describe very clearly the general and specific objectives of the services to be procured.]*

*[Emphasize how this assignment fits into the overall client programme; why the proposed assignment is important for the project.]*

*[Provide as much information as possible to describe the client’s vision of the assignment.]*

*[Consider that the TOR is going to be read by outsiders who have little or no knowledge of the project but are expected to propose a methodology and price for undertaking the assignment based on the information provided in the TOR.]*

**7. Scope of work**

*[This section of the TOR details all the main activities/tasks to be undertaken by the consultant and the expected results of those activities/tasks in order for the consultant to achieve the objectives of the assignment.]*

*[The list of the tasks should be clear and detailed and should be ordered either in in order of importance or chronologically. The list of tasks should make reference to any reports which the contractor is required to prepare described in section 9 of these terms of reference. Any activities/tasks requiring specific expertise should be clearly identified. If appropriate, the time schedule for completing the various tasks should also be stipulated here as well.]*

*[If applicable, any major managerial, economic, institutional and technical requirements should be included in this section. Further, suggestions to split the project into phases or different components should be made but they should not be too prescriptive as the consultants should propose the detailed organisation and methodology for the assignment.]*

*[If the services consist of or include the supervision of civil works, the following action that require prior approval by the client shall be added: “Taking any action under a civil works contract designating the consultant as “engineer”, for which action, pursuant to such civil works contract, the written approval of the client as “employer” is required.”]*

**8. Capacity building and transfer of knowledge**

*[If capacity building and transfer of knowledge are a specific objective of the assignment, specific details on the characteristics of the required services should be provided.]*

*[Define organizational arrangements. Clarify delimitation of responsibilities for the organization of the training: which cost will be covered by the client and which by the consultants; requirement for special training materials, number of trainees etc.).]*

**9. Reports and schedule of deliverables**

*[Identify reports and other deliverables required as a result of the activities/tasks defined in the scope of work.]*

*[Clearly specify assignment’s reporting requirements.]*

*[Indicate the format, frequency, and content of reports, dates as well as the number of copies, the language, and the names of the prospective recipients of the reports. For all major reports, an executive summary should be requested.]*

*[Number and frequency of reports should be carefully considered with the objective of finding a balance between keeping the client well informed and not forcing the consultant to spend an excessive amount of time preparing minor reports. Depending on the assignment, an inception report; interim, progress and/or special reports; and final report are usually required.]*

The reports can be replaced by certain certified deliverables, for example

1. Preparation of training material
2. Delivery of training

**10. Consultant’s qualifications and experience**

*[Define the (qualification and) experience requirements for each key expert of the firm or for the individual consultant. Experience must be expressed in instances and/or number of years; vague experience statements and adjectives (good experience, strong knowledge) should be avoided. Include other required factors such as regional experience, language, etc.]*

Key expert 1: Team leader

Qualifications and skills

*[Include requirements as appropriate. Minimum and preferred requirements need to be distinguished clearly.]*

General professional experience

*[Include requirements as appropriate. Minimum and preferred requirements need to be distinguished clearly.]*

Specific professional experience

*[Include requirements as appropriate. Minimum and preferred requirements need to be distinguished clearly.]*

Key expert 2:

Qualifications and skills

*[Include requirements as appropriate. Minimum and preferred requirements need to be distinguished clearly.]*

General professional experience

*[Include requirements as appropriate. Minimum and preferred requirements need to be distinguished clearly.]*

Specific professional experience

*[Include requirements as appropriate. Minimum and preferred requirements need to be distinguished clearly.]*

*[Define the minimum number of key and support staff required to carry out the assignment in case the procurement is for a firm. Any cost for support staff shall be included in the consultant’s financial offer as needed. Only the CVs for key experts should be submitted with the proposal.]*

In case of selection of an individual consultant, only the qualifications of one expert shall appear under this section.

**11. Location and period of execution**

*[Identify the location (i.e. city/town) of the operational base for the assignment, and any other location(s) where short-term inputs may need to be provided, etc.]*

*[Indicate the expected duration of the assignment, including the expected level of effort for each professional staff (in case of a firm) or the individual consultant required to carry out the assignment from the date of commencement, to the date the client receives and accepts the consultant’s final report or a specified completion date. Other dates may be considered (for example, the date of effectiveness of the contract, etc.).]*

**12. Project coordination**

*[Identify the specific entity that will be responsible for managing the supervision of the consultant and the administration of the contract.]*

**13. Services and facilities to be provided by client**

*[Indicate the inputs to be provided by the client. Detail all the information and services that will be made available by the client to the consultant. Indicate if any facilities will be provided to the consultant, including office space, vehicles, office and/or computer equipment, other equipment and/or telecommunication systems, etc.]*

*[Indicate allocation of counterpart staff to be provided by the client and the specifics of such arrangement (if said staff will work the same hours as consultants and/or under the consultants’ supervision).]*

*[Limit any services, facilities and other inputs by the client to the consultant to an absolute minimum to avoid over dependence of the consultant on the client and exposing the assignment to unnecessary risks due to failure of the client to comply.]*

**14. Services and facilities to be provided by the consultant**

*[Indicate facilities that the consultant is expected to provide. E.g. their own office space, laptops, own vehicle, etc. while carrying out the assignment.]*