



Consultant Management System Seminar

3 JUNE 2021 1:30PM - 3:30PM (PHI TIME)



ZOOM Q&A

QUESTION	ANSWER
<p>Why does ADB prefer these days individual consultant thru a firm? Usually, firm charges their overhead and other local taxes and others. Ultimately, individual consultant getting less remuneration than usual.</p>	<p>There is no official preference in ADB during individual consultant selections for selecting an independent individual or an individual through a firm. We select individuals based on the quality of the candidate's CV and EOI, regardless of whether they are independent or affiliated with a firm.</p>
<p>If an individual receives a consulting contract from ADB say for one year, can the individual consultant resign, maybe after 6 months?</p>	<p>Hi there - yes, it is always possible to resign in accordance with the conditions of your contract.</p>
<p>Does every office of the company local office of different country location need to register at ADB portal?</p>	<p>Not necessary. CMS registration has “address book” to list different locations.</p>
<p>How have you worked with national government to select consultants? Is there any impact from government side to select consultant?</p>	<p>Shortlists for the TA are sent to the government for no objection.</p>
<p>I’ve been an independent consultant at ADB since my time spent at HQ in 2010. I now have been accepted for 0 consultancies through the CMS since 2014. I believe there has been an unjust judgement on my service levels made in the past by an ADB staff. How do I assess whether this is in fact the case? I am aware that there exists a record on performance of consultant at ADB.</p>	<p>There may be many reasons why your EOIs have been unsuccessful to date. If there was a serious performance concern on one of your older assignments, you would have received a formal notice of unsatisfactory performance and would have had an opportunity to reply. Presuming you did not receive one of these, please keep applying to assignments relevant to your skills and expertise.</p>
<p>Can any company get the work from ADB project without the prior experience with ADB?</p>	<p>Yes, this is always possible, though generally speaking, ADB often gives favorable consideration to consultants with experience at least with other MDBs or international organizations, familiar with the ways that these organizations work. It depends on the context of the assignment - you can always ask this to the hiring officer for each selection.</p>

<p>Why ADB does not release the result with evaluation report for the proposal?</p>	<p>ADB sends the technical scoring to all companies who submitted the proposals. Companies who are not successful can request debriefing.</p>
<p>Considerable no. of EOI for my candidature has been mentioned as "sent to Executing Agency", but no feedback after that for long.</p>	<p>Keep trying! Some of our borrower-led selections do indeed take a long time to finalize.</p>
<p>Is there a standard consultancy rate matrix depending on their experience?</p>	<p>ADB does apply a consultancy rate matrix as one of its criterion for the rate offer, based on industry and job level.</p>
<p>What does Loans and Grants are EA administered mean?</p>	<p>EA stands for Executing Agency, they prepare the procurement plan, the Consulting Services Recruitment Notice, the draft terms of reference (TOR), undertakes recruitment actions including shortlisting, they prepare and issue the request for proposals (RFP), evaluate the proposals when proposals are required, and negotiate and sign the contract with the selected consultants.</p>
<p>As per the guidance notes for adding project references in CMS, assignments completed by individual experts working privately or through other consulting firms cannot be claimed as experience for shortlisted consultants, or that of the joint venture partners or sub-consultants. My question is can assignments completed by employees of lead consulting firm as individual assignments be used as consulting firm experience?</p>	<p>Presuming the assignment was completed by the employee prior to or separate from their employment with the firm, then, no, this is not to be considered part of the firm's experience. Only assignments completed by employees during their period of employment with the firm can be considered as part of the firm's experience.</p>
<p>Isn't it that previously engaged consultants can access on their performance on consultancies at ADB?</p>	<p>Performance records are confidential except when an unsatisfactory rating is proposed and subsequently issued.</p>
<p>What is ADB's process for direct financial assistance to private sector projects? Do they also come with similar Rate of Interest as that for Public Sector financing?</p>	<p>https://www.adb.org/what-we-do/private-sector-financing/main</p>
<p>Is the rate matrix available on ADB website for reference?</p>	<p>The matrix is an internal document and is not disclosed to public.</p>
<p>Is a firm entitled to feedback when it is not shortlisted at the EOI stage or is it only at the proposal stage? If entitled to feedback at the EOI stage, who should we ask to?</p>	<p>Firms are not entitled to feedback when not shortlisted at EOI stage but are entitled to debriefing if not invited to negotiations following an RFP process.</p>
<p>In what situation does ADB select an Individual Consultant thru firm?</p>	<p>Individual consultants are selected on the basis of individual qualifications. This covers both</p>

	independent consultants and consultants affiliated or employed by the firms.
How to determine if one has an unsatisfactory rating — I have not received one, yet I firmly consider that there has been an unsatisfactory rating made.	Hi there, if you have not received an "unsatisfactory" formal notice, then you do not have an unsatisfactory rating in the system.
Is there a list of current ADB consultants published somewhere?	We don't publish the list of current individual consultants. Lists of contracts awarded to firms are published.
Is the cost and no cost evaluation criteria known by the consultant at the time of preparing a submission?	Yes, the method of selection is specified in CSRN and in the RFP data sheet.
How many maximum JV partners can be added?	There is no maximum but obviously having too many partners will make your work difficult to manage. Thanks.
Do we need to have to add local partner of specific country where ADB project is under bidding?	No, this is not required.
Are these framework agreements based on FIDIC or NEC?	ADB specific form
Why doesn't ADB keep qualification criteria in EOI?	We do, based on the information required in the EOI, teams assess accordingly - e.g., on management competence, project experience, key considerations in approaching the assignment, etc.
Is there any guidelines for finalizing the selection process? Just a few days ago, received a communication from CMS saying the project closed in 2020. I had applied in 2018 and all these days it was showing 'Being Evaluated' status.	It may have been that the selection was cancelled. Sometimes selections are advertised that do not go forward for various reasons into a contract.
How long is the turnaround time?	Turnaround time varies by selection, there are no set "standards" - there are many internal and external factors that might delay a selection process.
In the case of a joint venture expressing interest for an assignment (consulting opportunity): Does the lead firm need to be the entity hiring all sub-consultants? OR can the associate firm hire sub-consultants as well (both firms and individuals)?	Associate firm or JV partner can hire the firm or propose in-house staff.

Is there a plan for procurement plans to become more consistent/standardized across different projects?	All our procurement plans follow a standard template.
What is the ADB process for SSS - Single Source Selection? How can we get shortlisted for SSS?	SSS is based on specific criteria outlined in our procurement policy and staff instructions, e.g., emergency situation, exceptional experience.
Is ADB Single Source Selection - SSS policy applicable for projects in India?	Yes
Another area where individual consultant selected through firm loses out (if not an employee of the firm) is the tax benefit. ADB remuneration is not taxable in almost all jurisdictions. However, when recruited through a firm the tax benefit is availed by the firm but the consultant has to pay taxes since s/he received the remuneration from the firm not ADB.	The observation is generally correct and doesn't require an answer.
Does each consulting project have different termination clauses or are there standard terms? If standard, what are the termination clauses for both parties to the agreement?	The terms are standard.
Is there an email list that sends you new opportunities, or do we need to keep an eye on the CMS?	Yes, you can indicate in CMS your interest to receive a weekly email summarizing all opportunities that were posted in CMS that week. It's very useful! You'll need to sign up for a CMS profile first.
Are CVs evaluated at the EOI stage? Do they strengthen the EOI?	For individual selections, CVs are evaluated at EOI stage. For CQS, key CVs are also evaluated. For other selection methods, CVs are not required at EOI.
An important question - if a firm X has applied with my CV as part of team and loses out; can the winning firm Y take me into the team if possible? Member of original team proposed may not be available for various reasons etc.	This is possible - but you would need to facilitate this yourself with the firm.
Is it mandatory for all experts engaged under the contract, whether key or non-key, must be citizens of one of the ADB member countries, if the lead consulting firm is from an ADB member country?	This will depend on the conditions of the RFP issued to your firm.
Is there a plan for the release of the procurement plan and level of detail to be standardized?	Release of procurement plans is guided by ADB policy (usually every 18 months) and level of detail is as set out in the template.

<p>ADVANCE CONTRACTING. We miss a bit more clarity and transparency on Advance Contracting. Good examples are Balakot Dam in Pakistan that went from virtually no information to a PID with the status of "proposed" to status "Approved" within days, considering previous years of no project updated on ADB website at all. (https://www.adb.org/projects/49055-007/main#project-tenders). Similar with ADB's MRT 4 consultant contract in the Philippines.</p> <p>Does ADB have any future improvements on Advance Contracting release of information?</p>	<p>ADB's public release of information is guided by various policies including our Access to Information Policy. Project departments monitor compliance to this but there may be reasons why some information is not released immediately. You can always email the listed project officer to ask for information where you feel some might be missing.</p>
<p>In the case of an expression of interest for an assignment (consulting opportunity): Can references of sub-consultants (firms) be used as part of the 10 selected references? Can references of sub-consultants (individuals) be used as part of the 10 selected references?</p>	<p>Yes, experience of subconsulting firms may be claimed within the EOI. However, assignments completed by individual experts working privately or through other consulting firms cannot be claimed.</p>
<p>How should we claim invoices for resource person contracts? We are unable to do it through TACP portal.</p>	<p>This depends on how your resource person assignment was signed. If it was signed through CMS - claims should be able to be made and paid through CMS. If it was signed offline, payment may be paid by the project team in cash with a countersigned receipt.</p>
<p>There are many projects that are several years old and in an 'Active' status that do not have a procurement plan.</p>	<p>Some projects, such as policy-based lending, do not necessarily have procurement plans since they are not engaged in any procurement.</p>
<p>For EOI submissions, are we supposed to include an attachment with detailed information or only the online question gets evaluated?</p>	<p>You are welcome to include attachments in addition to your CV but there is no guarantee that these will be read by the evaluators. It's important to provide good, detailed responses in the main EOI fields first.</p>
<p>I would like to know what are the chances of being selected for any form of assignment as an individual consultant with only experience outside of Asia?</p>	<p>Some assignments may not require Asian expertise - particularly those related to nonoperational work like editing, strategy, HR, etc. Most operational work related to ADB projects would benefit from experience in Asia and with the member countries receiving the project.</p>

Do we also need submit the work certificate issued by client?	Generally not necessary for consulting selections, though it may be requested in some cases.
Can an individual be an international consultant for a regional TA when his/her country is one of the RETA's scope? And can national consultants shift between international and national contracts? What would be the basis of eligibility?	Yes, it's possible if you can demonstrate international experience. And yes, consultants can take on both international and national roles and have an established rate for each.
What is the evaluation/selection criteria?	They are indicated in the RFP package.
Do you consider the project experience of the partner (sub-consultant). In the EOI stage, we notice that we can add the PDS of our subconsultant in the top 10 project data sheet that we include in the EOI.	Yes, you may submit project references of your proposed joint venture partners or subconsultant firms during EOI.
Are both JV firm and sub consultant firm project references in the BEST 10 projects in ADB CMS portal evaluated or only from lead firm is evaluated for the BEST 10 projects?	ADB evaluators will generally prefer to see strong experience from the lead firm, though will also consider project experience from subconsultant firms.
Why does ADB ask how much a consultant wants to get paid when that information is already given by the consultant in the EOI?	We request substantiation to establish if the rate is appropriate.
What are the termination clauses in standard individual contracts from either sides?	Termination clauses are present in ADB's standard contracts. You can view them when issued a draft contract or RFP with draft contract.
Sometimes I get the hint to contact the responsible officer for a tender. Is that really possible?	You should avoid contacting the project officer directly during the competitive phase to avoid potential integrity violations. Project officers may give public information about the pipeline.
When a firm intends to apply for a tender, of which the tender lists several international staff required, does that have to be met during the submission of the proposal, i.e. identification of specific specialists?	Yes, if there are required positions stated, then firms will need to meet these at RFP stage. At EOI stage it is not necessary to propose CVs except under the CQS selection method.
If a company is unable to submit their EOI/proposals by the deadline due to a technical glitch on the CMS, will you allow the company to make their submission/s after the deadline?	If it can be proven that it is a technical fault with CMS.
Surely consultants cannot be required to submit rates that have unchanged over time or that do not reflect requirements in the TOR which necessitate a higher rate?	If they are unable to substantiate a higher rate, we will use our fee rates matrix.

<p>Do we need to provide expert CVs also for the EOI?</p>	<p>Not normally unless it is CQS method.</p>
<p>Once we get shortlisted, are you giving same weight on the experience (PDS) of the JV partner and subconsultant firm for the proposal (TECH 2)?</p>	<p>JV partner normally is given more consideration than subconsultant</p>
<p>I didn't know there is such feature on CMS as CMS Messaging and that Contract Negotiations can be conducted online using CMS messaging. I'm a Procurement Specialist on one of the ADB funded project and have been doing contract negotiations via email. Where in CMS can I find the feature for messaging?</p>	<p>CMS messaging is available to ADB staff or contingent staff with approved CMS access who lead consulting selections. It is not used for borrower-administered selections except when those selections have been delegated to ADB to run through CMS.</p>
<p>Does ADB has a standard evaluation criteria for all Expression of Interests (EOIs)? If so, please guide us on that. Adding on this, what is the significance of adding CVs at the EOI stage?</p>	<p>CVs at EOI stage are not required for firm selections apart from CQS. Evaluation criteria for EOIs are set by the project teams and are based on the information required in the EOI form.</p>
<p>After being shortlisted at the EOI stage, is it possible de change (add or remove) some of the members of the proposed joint venture? Is it possible to change (add or remove) some of the proposed sub-consultants?</p>	<p>If you are shortlisted on the basis of qualification of all firms in the JV/ association, the basis for removal that can be accepted is sanction of the partner, bankruptcy of the partner or similar circumstances. Under any circumstances, please get in touch with the client.</p>
<p>If I allow my CV to be used for bids by different firms for the same project, does it lower my credibility (and the chances of any of these firms winning)?</p>	<p>Not usually, as this is fairly common, though it may lower your credibility among the other firms if they find out about it from each other and you had committed to one or more of them that you would be exclusive.</p>
<p>Why is tax information number required in CMS updating?</p>	<p>Only Filipino consultants are required to provide TIN. It is considered by the EAs in the PHI evaluating EOIs.</p>
<p>We want more clarity in EOI for CV requirement? In the EOI, CQS is not very clear.</p>	<p>For firm EOIs, CVs are not required except for CQS selection method. For individual consultant selections, CV is required and is the most important part of the evaluation. CQS means "consultants' qualifications selection" and is a selection method for firms. It is fairly uncommon - most selections go via QCBS. CVs are required for CQS because the idea of CQS is that only one firm is invited to submit a proposal based on the quality of the EOIs, including quality of experts.</p>

<p>I have CMS account since I do all the posting of TORs for the project on CMS. All the recruitment process from beginning to finalization of contract is done by me including contract negotiation with consultant. Does this mean I still have no access to this feature?</p>	<p>Contact CMS Help at cmshelp@adb.org and they can help you to find it or to check your access level.</p>
<p>If I run a consultancy firm but it is just myself, do I register as a Consulting firm, individual or both?</p>	<p>Register as individual, if you want to be contracted as individual. Register both, if you want to be contracted through your firm. Please note that if you are contracted through firm, medical insurance coverage would not be offered and your tax position may be affected.</p>
<p>Should we send the EOI queries over email?</p>	<p>Yes - to the listed project officer.</p>
<p>Is CV in short form acceptable or do we need to submit the detailed CV?</p>	<p>ADB has a CV template that should be used. CVs should generally stay within 5 pages for individuals and the 5-page limit is a requirement for firm selections.</p>
<p>Are there more opportunities (EOI especially) in the CMS compared to the "projects & tenders" section on the ADB website?</p>	<p>The projects and tenders page shows all ADB opportunities - goods, works, consulting, nonconsulting, whereas CMS only shows ADB-administered (and a few borrower-administered) consulting opportunities. So, the projects and tenders page is more comprehensive.</p>
<p>Can we have the already listed individual consultants and how can we contact them?</p>	<p>ADB does not disclose a list of individuals registered in CMS - it would be a privacy breach. You can sign up to our ADB Consultants Network on LinkedIn to find many of them, though.</p>
<p>Does ADB restrict consultant selection on the basis of age?</p>	<p>No</p>
<p>If the RFP Data Sheet states "No" in shortlisted consultants may associate with other shortlisted consultants, can the shortlisted firm include another firm (that did not submit EOI) as sub-consultant?</p>	<p>Yes, provided this is allowed in the RFP.</p>
<p>Even with the best references and also worked for World Bank with best CV we have never been shortlisted by ADB. Any particular reason?</p>	<p>There may be many reasons for this - keeping building your firm's experience in ADB's member countries, networking with ADB project officers, and attending events like this to learn more about our work and strategies for success in preparing your proposals and presenting your experience.</p>

Would past contracting values be something you would include under Attachments and Certifications or is that materials you would wait until ADB asks to supply such proof?	Contract information for previous contracts for firms have the data entry for contract value.
How do you define "affiliation" in this case? Are both firms under the same umbrella organization? Or are affiliated firms two separate entities that are going to closely work together for the tender submission?	Affiliation is an agreement to work together on one or more opportunities advertised by ADB. "Affiliation" is not a defined term in our RFP - we use the terms "joint venture" and "subconsultant/subcontract". Hopefully those terms are clear.
Can a firm with 1 consultant apply for individual consultant and firm consultant as well?	You can apply for individual assignment. You are unlikely to qualify for firm engagement.
Provided that this is allowed in the RFP, do we have to seek approval from ADB if a shortlisted firm wants to include another firm in the proposal?	You are not obliged to seek approval, but it is a good practice to advise that you are planning to do so. Please make sure that the added firm is not a JV partner in another proposal.
During EOI, can we include subconsultants who want to go with us on a non-exclusive basis?	Yes, you can.
Please share the ADB portal link for latest ADB procurement policy document for Consulting Firms.	You can get started here: https://www.adb.org/business/main#tab-1
Are these information provided in the Tutor page?	Tutor page provides information on use of CMS.
If we have to change just the address/ email address of the authorized representatives, do we have to initiate contract variation for existing contracts to incorporate this change?	This would be good contract management practice, though most important is to let the project team you're working with know about this. The change can be processed formally later on when there may be a need for other changes such as change in expenses.
Can we submit the proposal from our different offices on the same EOI?	Not necessary.
What do we mean by 'actively' registered consultants?	The registration needs to be "active" and you need to click "I want to receive notifications".
Is it true that resource person engagements are not reflected in a consultant's CMS history and in fact, RP doesn't appear at all? Rates are different for consulting and RP engagements too regardless of national or international?	RPs processed through CMS are reflected. Rates cannot be used for other contracts, as they are not offered using benchmarking tool.
Do we need to add letter of association of Sub Cons/JV partner at EOI stage?	Not necessarily for EOI stage. You need to have "affiliated" status with the other firm.

Can the previous contract as full time employee be considered, even if it's not a consultant job, to show as proof fee in case the offer is too low?	Yes, you can provide contracts showing remuneration including as a full time employee.
Is the consulting services budget includes the professional fee of the consultant?	Yes.
In EOIs, is it necessary/mandatory to include only credentials/project reference from ADB member countries, or can we include our similar references from across globe?	Global is fine.
Will the CMS be updated to reflect all ADB contracts regardless if engagement is TA, staff con, firm or RP? Only staff consultant engagement appears unlike in the profile experience section that is used in the EOIs.	Contract administration module is limited to staff consulting budget.
Will ADB member country experience gets better weight over non-member countries like Africa/Middle East at EOI stage?	Generally, ADB looks favorably upon experience within its developing member countries, but the extent of regional experience required depends on the assignment.
For an EOI, in case our chosen sub-consultant is not registered on CMS, we would need to require them to register on the platform. How long would it take for a firm to create their account? Is there any way to speed up the process when expressing interest for an assignment?	Creation of an account is quick - just a few minutes to input the basic details. More detailed inputs on projects, experience, etc. can come afterward.
In case of expressing interest by a firm, do we already need to attach CVs of the experts at CMS on the stage of EOI to get a higher chance of being shortlisted?	During the request for proposal stage, it is not required for individuals to be registered. However, it is required during the negotiation phase.
How do we get the feedback on the unsuccessful proposal?	Firms invited to RFP that are not invited to contract negotiations are able to request debriefings from ADB.
Is there a problem with a local consulting individual or local consulting firms being included as a potential subcontractor in multiple NCIs? In other words at the EOI stage, can the same local consultants be mentioned in two different competitive bidders teams?	The same person can be present in more than one proposal, provided he/she is not a full time employee of one of the firms.
As individual consultant, do you need to be ASEAN citizen (means passport or residence?); For a firm, is it enough that the firm is Asian, but the consultant has European passport?	If you wish to apply for assignments as an individual consultant, you generally need to be a citizen of one of ADB's 68 member countries. If you wish to apply as an expert within a firm, some firm selections allow experts to be citizens

<p>In my case my firm is located and registered in Malaysia. I do live in Malaysia. But I am German citizen (German passport). My last 17 years I have been working in healthcare all over Asia.</p> <p>What is the solution for me to be selected through the CMS system?</p>	<p>of any country, subject to any UN sanctions on that country.</p>
<p>Would you instruct EAs and IAs, why after more than 2 years the STATUS information is still "Forwarded to Executing Agency", to delete or not short listed or not selected?</p>	<p>We are not able to instruct the EAs.</p> <p>Some EA/IA selections do take time or may have stalled or been cancelled due to various reasons.</p>
<p>How do you find the debrief material on why you were not successful?</p>	<p>Firms invited to RFP that were not successful may request a verbal debriefing from ADB.</p>
<p>Is there a panel or board of reviewers who see the EOIs prior to the hiring officer and then who approve or reject a consultant's qualifications?</p>	<p>The project team evaluates EOIs and determines those to be shortlisted against criteria they set. This is then reviewed internally before being approved.</p>
<p>Can a TA consultant with intermittent assignment apply for another assignment? Any restrictions? Please specify.</p>	<p>Yes, this is possible. We check for non-overlapping clearances internally to ensure no overlapping conflicts.</p>
<p>Can we get project completion certificates from ADB?</p>	<p>You can get tax certificates that indicate your engagement on the assignment.</p>
<p>What is the process to get tax certificates for completed assignments?</p>	<p>You can request through your project officer.</p>