



WORLD BANK GROUP
eConsultant

Electronic Selection of Consultants



User Guide for Consulting Firms
Version 2

This User Guide was produced by the Operations and Corporate Procurement Groups and the Information Solutions Group Global Support Training Team of the World Bank Group.

September, 2007

Table of Contents

| | |
|--|----|
| Introduction..... | 1 |
| Create World Bank Group and WBG eConsultant accounts | 1 |
| Create a WBG eConsultant account..... | 4 |
| WBG eConsultant Navigation | 5 |
| Dashboard tab | 5 |
| Selections tab | 5 |
| Public Notifications tab..... | 6 |
| Profile tab..... | 6 |
| Additional Help and Assistance..... | 7 |
| View Notification and Express Interest..... | 7 |
| Subscribe to a Notification..... | 7 |
| Express interest | 9 |
| View the status of a submission..... | 12 |
| View RFP and submit proposals..... | 13 |
| Submit Request for Clarification (RFC)..... | 16 |
| Upload technical and financial proposals | 17 |
| Submit proposal | 19 |
| Withdraw a proposal | 20 |
| Evaluation of proposals..... | 21 |
| Negotiation and Award..... | 22 |
| Update selection team information..... | 28 |



Introduction

The electronic selection of consultants (WBG eConsultant) is a secure web-based tool that supports current and prospective consulting firms doing business with the World Bank. WBG eConsultant contributes to the transparency of the selection process by allowing consulting firms to view opportunities, express interest, obtain documents, send proposals, and communicate with the Bank in a secure online environment.

WBG eConsultant uses a “wizard” interface to walk you through each stage of the process.

You may use WBG eConsultant to:

- Manage the overall selection process
- Create and submit expressions of interest
- View and download Request for Proposal packages, and submit Requests for Clarification
- Create and submit technical and financial proposals
- Negotiate with the World Bank Group if your firm is selected for award

Note: WBG eConsultant is currently designed to support consulting **firms** only. In the future, the system may be modified to support individual consultants.

Create World Bank Group and WBG eConsultant accounts

By creating a WBG eConsultant account, you are agreeing to be the primary contact for your firm. As primary contact, you may express interest in opportunities on behalf of your organization. You will also manage and coordinate all correspondence with the World Bank for those opportunities in which your firm is participating.

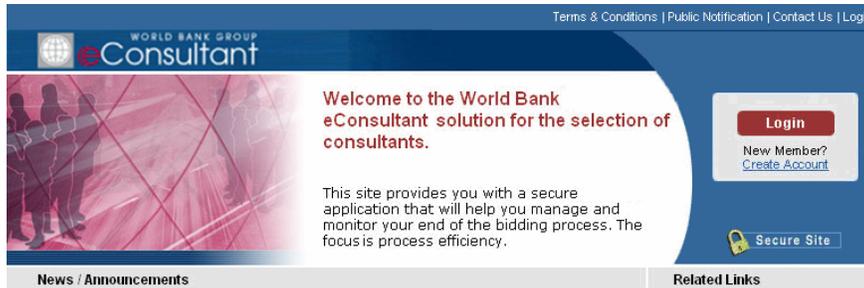
Before creating a WBG eConsultant account, you must first create your World Bank Group account.

Note: To access WBG eConsultant, consulting firms must have an internet connection and Microsoft Internet Explorer Version 6.0 or above.

Help For Consultant Firms

1. To log in, type www.worldbank.org/wbgeconsultant in your browser's address bar.

The WBG eConsultant main page appears.



2. Click [New Member? Create Account](#)

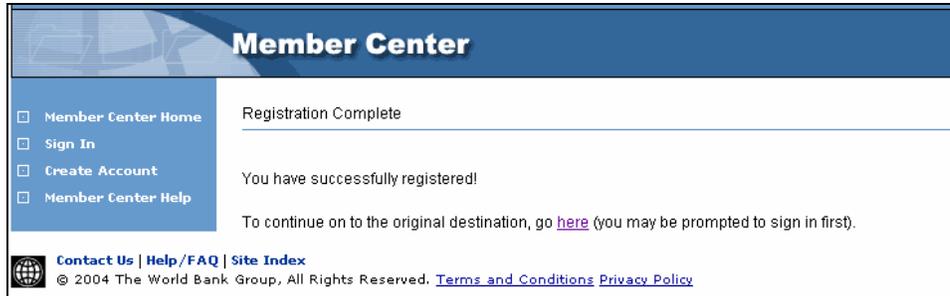
The Member Center Create Account page appears. On this screen you are creating a World Bank Group account that will allow you to access WBG eConsultant and other web services.

3. Fill in the form.

Note: Passwords are case-sensitive and must be at least six characters;
Select “Consultant” as your primary business;
Select “To find business opportunities” as the reason for visiting the site.

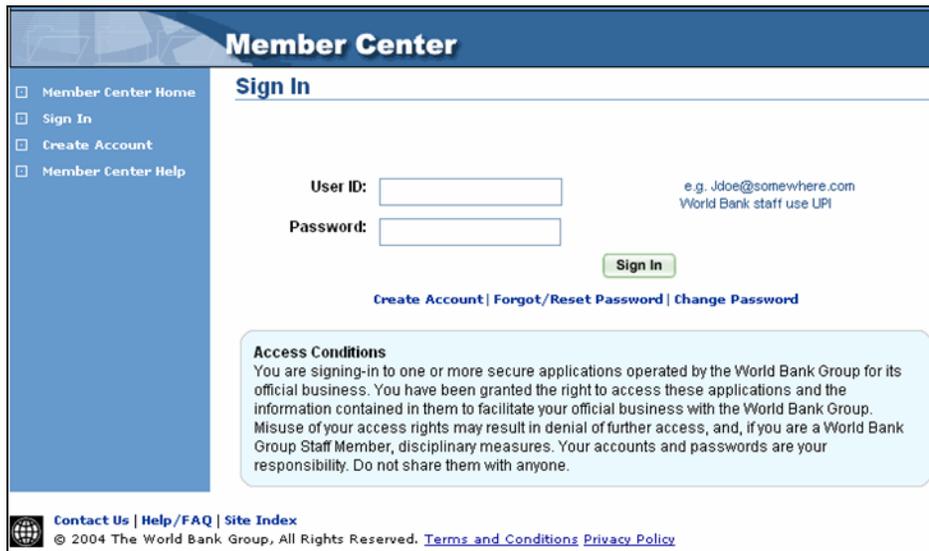
4. Read the Access Conditions at the bottom of the page and click .

The registration confirmation page appears.



5. To proceed to WBG eConsultant, click the [here](#) hyperlink in the message.

The Member Center sign in page appears.



6. Enter your email address and the password that you just created.

7. Click .

Create a WBG eConsultant account

The WBG eConsultant account creation page appears. On this form, you will provide specific information about yourself and your business.

The screenshot shows the top of the WBG eConsultant account creation page. It features the World Bank Group logo and the text "eConsultant". Below the logo, there is a paragraph of instructions: "Enter the following information and click 'Submit' to create an account for the World Bank's eConsult system. A confirmation will be sent to your email address. A business need not be an approved World Bank Vendor nor submitted an Registration Application in order to express interest or submit a proposal. A Registration Application is only required for firms who have been recommended for an award. To be approved as a registered World Bank Vendor, the business enterprise must complete the Vendor Registration Application and be able to demonstrate that it has been and is offering goods/services under the business name. Sole Proprietors must be able to demonstrate that they have been engaged in their business activity for not less than one year." A small question mark icon is located at the bottom right of the instruction box.

Fields denoted with red '*' are required.

| Contact and Password Information | |
|----------------------------------|------------------------|
| First Name * | eConsult |
| Last Name * | eConsult Tester |
| Title * | |
| Telephone Number * | |
| Fax Number | |
| Email Address * | testing@thejkgroup.com |

| Firm Information | |
|--------------------------|--------------|
| Firm Name * | |
| Legal Form of Business * | <- Select -> |
| Address * | |
| Address 2 | |
| City * | |
| State (mandatory if US) | |
| Region | |
| Zip / Postal Code | |
| Country * | Afghanistan |
| Year Established * | |
| Full Time Employees * | |
| DUNS Number | |

| Diversity Information for Firms with United States Offices or Presence | |
|---|--|
| Are you currently certified as a Minority / Women / Disabled Business Enterprise (MWDDBE) ? | <input type="radio"/> Yes <input type="radio"/> No |
| If yes, list certifying organization. | |

Submit

Note: Fields marked with an asterisk are required fields.

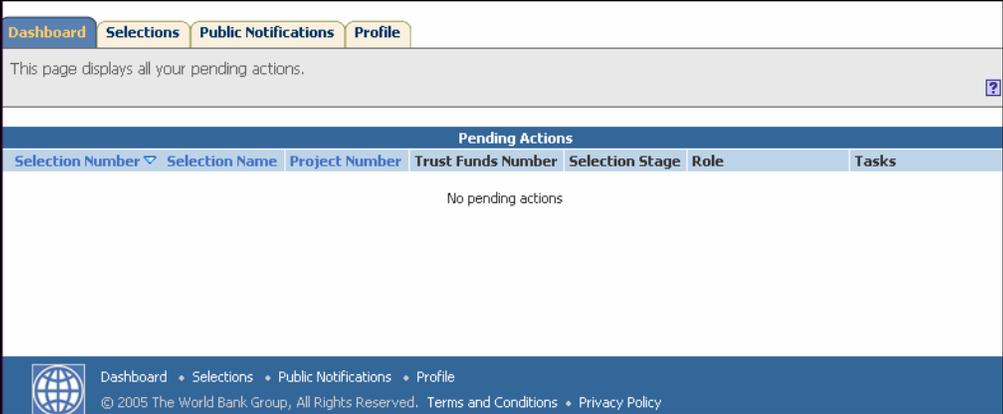
8. Complete the form and click **Submit**.

You have successfully created your WBG eConsultant account.

WBG eConsultant Navigation

Dashboard tab

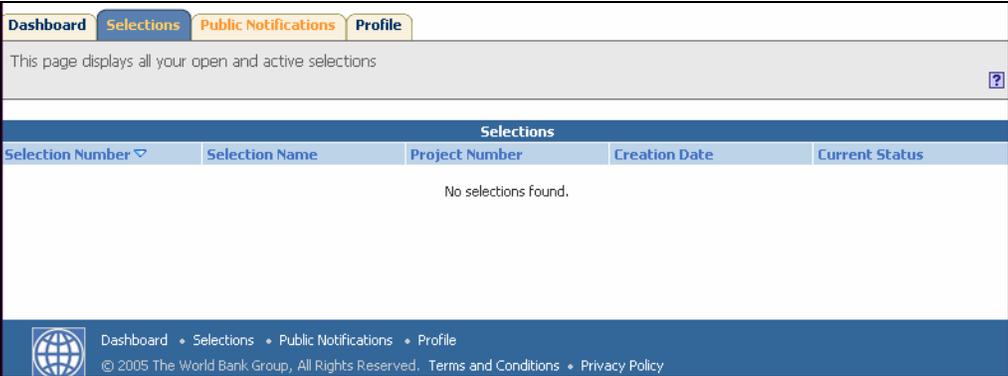
Once you've logged on to WBG eConsultant, you'll see the personalized Dashboard page. The Dashboard lists all pending selections for which you have expressed interest or were invited to propose.



WBG eConsultant uses tabs to assist you in navigating. In addition to the Dashboard tab, you will see three other tabs at the top of the page: Selections, Public Notifications and Profile.

Selections tab

The Selections tab lists all selections that you have worked on.



Public Notifications tab

Public Notifications lists all current opportunities available within WBG eConsultant. This page also contains links to the dgMarkets and UNDB Online websites for your convenience.

Dashboard
Selections
Public Notifications
Profile

This page displays all of the publicly available notifications. Click on a row to review a notification details and to express interest.

Requests for Expressions Interest for consultants hired directly by the World Bank for its operational work* are published in this website, the dgMarkets, and UNDB Online.

This policy applies to the procurement of consulting firms when the estimated contract amount is above US\$ 50,000.

(*)"Operational work" is work necessary to carry out the Bank's lending operations and non lending activities, and includes work on project identification, preparation, appraisal, supervision, evaluation, analytical and advisory activities, policy and program work, research, training, and activities associated with various partnership programs regardless of whether such work is carried out by Regional or central units of the Bank, but excludes administrative activities conducted by general Services Department (GSD). Individuals and consulting firms engaged by the Bank to support the activities of the Bank's administrative complex (e.g., financial and accounting services, training, software development and systems analysis) are not covered by this statement; the Material Management Policy and Procedures and The World Bank Group [Corporate Procurement Policies and Procedures](#)

| Public Notifications | | | |
|----------------------|------------------------|----------------|-------------------|
| Selection Number ▾ | Selection Name | Published Date | Response Due Date |
| 102765 | Evaluation of Mortg... | 2006-11-23 | 2006-12-08 |
| 102764 | Mortgage SOFOLS - M... | 2006-11-23 | 2006-12-08 |
| 102741 | Establishment of a... | 2006-11-17 | 2006-12-08 |
| 102737 | Monitoring and Eval... | 2006-11-15 | 2006-12-04 |
| 102709 | Preparation of a Pa... | 2006-11-02 | 2006-12-15 |
| 102697 | Technical Support a... | 2006-11-01 | 2006-11-30 |
| 102547 | IFC Survey of TAAS ... | 2006-11-22 | 2006-12-07 |

Dashboard • Selections • Public Notifications • Profile
© 2005 The World Bank Group, All Rights Reserved. [Terms and Conditions](#) • [Privacy Policy](#)

Profile tab

On the Profile tab, you can update information for your firm.

Dashboard
Selections
Public Notifications
Profile

Display Company Profile

| Background | Update |
|---------------------------------|---|
| Business Name | Clawson Associates |
| Country where registered | United States |
| Legal Form of Business | Partnership |
| Address | 1511 University Blvd Washington DC 20433 |
| Year Established | 2004 |
| Full Time Employees | 3 |
| DUNS Number | 0 |
| Federal Tax ID | |

Firm Contacts

Add Contact
 Update Contact
 Remove Contact
 Make Primary Contact

Additional Help and Assistance

If you need help with WBG eConsultant, click the Help hyperlink  located on the right-hand side of most pages.



Check the WBG eConsultant Welcome page for links to video demonstrations and a Quick Reference Guide.

If you need additional assistance, please contact the World Bank Group's Global Support Center by sending an email to wbgeconsultant@worldbank.org.

Note: WBG eConsultant is only available in English.

View Notification and Express Interest

Notifications are published on dgMarkets, UNDB Online and within the WBG eConsultant system. No registration is required to view notifications on the Bank's internet site. However in many cases, the Team Leader for the opportunity (or selection, as we call it) will include attachments such as the Terms of Reference in the notification. You will only be able to see attachments while you are logged in to WBG eConsultant. Registration is required to express interest in an opportunity listed on WBG eConsultant. (For instructions, see "Create a WBG eConsultant account" on page 4.)

Subscribe to a Notification

The first step in Expressing Interest is to subscribe to a Notification or Advertisement. When you subscribe, the notification is added to your personalized Dashboard page. To subscribe,

1. Log into WBG eConsultant.
2. Click the Public Notifications tab to view all current notifications.

Help For Consultant Firms

The notifications page appears.

Dashboard **Selections** **Public Notifications** **Profile**

This page displays all of the publicly available notifications. Click on a row to review a notification details and to express interest.

Requests for Expressions Interest for consultants hired directly by the World Bank for its operational work* are published in this website, the [dgMarkets](#) , and [UNDB Online](#).

This policy applies to the procurement of consulting firms when the estimated contract amount is above US\$ 50,000.

(*)"Operational work" is work necessary to carry out the Bank's lending operations and non lending activities, and includes work on project identification, preparation, appraisal, supervision, evaluation, analytical and advisory activities, policy and program work, research, training, and activities associated with various partnership programs regardless of whether such work is carried out by Regional or central units of the Bank, but excludes administrative activities conducted by general Services Department (GSD). Individuals and consulting firms engaged by the Bank to support the activities of the Bank's administrative complex (e.g., financial and accounting services, training, software development and systems analysis) are not covered by this statement; the Material Management Policy and Procedures and The World Bank Group [Corporate Procurement Policies and Procedures](#)

| Public Notifications | | | |
|----------------------|------------------------|----------------|-------------------|
| Selection Number ▾ | Selection Name | Published Date | Response Due Date |
| 102765 | Evaluation of Mortg... | 2006-11-23 | 2006-12-08 |
| 102764 | Mortgage SOFOLS - M... | 2006-11-23 | 2006-12-08 |
| 102741 | Establishment of a... | 2006-11-17 | 2006-12-08 |
| 102737 | Monitoring and Eval... | 2006-11-15 | 2006-12-04 |
| 102709 | Preparation of a Pa... | 2006-11-02 | 2006-12-15 |
| 102697 | Technical Support a... | 2006-11-01 | 2006-11-30 |
| 102547 | IFC Survey of TAAS ... | 2006-11-22 | 2006-12-07 |

- Find the notification you wish to express interest in, and click on its Selection Number to view the details.

Dashboard **Selections** **Public Notifications** **Profile**

You can subscribe to this notification by clicking the 'Subscribe' button. [Printer Friendly Version](#)

| General Information | |
|--|---|
| Assignment | Moldova -- Impact of deteriorating district heating on residential households |
| Selection Number | 102955 |
| Notice Type | Request for Expression of Interest |
| Advertise Electronically | World Bank Internet, dgMarkets, and UNDB Online |
| Notification Publication Date | 12/14/2006 |
| Deadline for Submission | 12/29/2006 |
| Language of the Notice | English |
| Optional, Common Procurement Vocabulary (CPV) for services to be procured | |

Contact Information for Advertisement

Contact Person

- After reading the selection details, scroll to the bottom of the Notification, and click **Subscribe to Notification**.

This action places the notification on your Dashboard and enables you to begin the expression of interest process.

Note: All selections to which you have subscribed will be listed on the Dashboard tab. If you click the Selection Number hyperlink, you will see the Selection summary. To perform an action, click the appropriate hyperlink in the Tasks column.

| Pending Actions | | | | | | |
|------------------|------------------------|---------------------|--------------------|-----------------|--------------|-----------------------------------|
| Selection Number | Selection Name | Project Number | Trust Funds Number | Selection Stage | Role | Tasks |
| 102737 | Monitoring and Eval... | Not Project-Related | | Notification | Firm Contact | Create Response |
| 102729 | bo review of fps | P101734 | | Notification | Firm Contact | View Notification |

Express interest

1. At the Dashboard tab, click the [View Notification](#) hyperlink in the Tasks column.

The View Notification tab appears.

| Notification | |
|--|---|
| ID: 102729 | Assignment: bo review of fps Team Leader: Status: REI Published |
| View Notification Create Response View Response Shortlist Status | |
| This page displays a World Bank opportunity. Review the details and if you want to express interest, click on the Express Interest button. | |
| Printer Friendly Version | |
| General Information | |
| Assignment | bo review of fps |
| Selection Number | 102729 |
| Notice Type | Request for Expression of Interest |
| Notification Publication Date | 11/09/2006 |
| Deadline for Submission | 11/24/2006 |
| Language of the Notice | English |
| Contact Information for Advertisement | |
| Contact Person | |
| Organization Name | World Bank |
| Address Line 1 | 1818 H Street, NW |

Notice that the top of your screen has changed. Just below the Level 1 tabs, you see a Level 2 indicator telling you that you are at the Notification stage of the process, as shown below.

| Dashboard | Selections | Pub |
|---------------------|------------|-----|
| Notification | | |

Below the Level 2 indicator, you see Level 3 tabs: View Notification; Create Response; View Response; and Shortlist Status.

These tabs are designed to guide you step-by-step through the Bank Group's procurement process. Once you complete the information on one tab, the next tab becomes active. In this way, you are able to work through the process with an understanding of what tasks are ahead of you, as well as what tasks are completed.

2. Scroll to the bottom of the screen and click **Express Interest**.

The Create Response form opens.

The screenshot shows a web application interface for creating a response. At the top, there are navigation tabs: Dashboard, Selections, Public Notifications, and Profile. Below these is a notification header with details: ID: 102737, Assignment: Monitoring and Eval..., Team Leader: Aminur Rahman, and Status: REI Published. The main navigation bar includes View Notification, Create Response (which is highlighted), View Response, and Shortlist Status. A message states: "To express interest, complete the form below and click on Submit." Below this is a section for Qualification Responses, which is a table with two columns: Relevant Qualifications and Explanation. There are three rows of qualification questions, each with a corresponding text input field for the explanation. The first row asks for information showing qualification in the field of assignment. The second and third rows ask for core business and years in business. Below the qualification section is a Comments section with a text area and a "Comments from your company" label. At the bottom, there is an Attachments section with an "Add Attachment" button and a "Delete" button. The footer contains "Save Changes" and "Submit" buttons.

3. Fill in the Qualification explanations in the spaces provided and enter additional comments if necessary.

Add attachments

You may attach documents to your Expression of Interest.

1. On the Create Response tab, click **Add Attachment**.

The Upload a Document screen appears.

2. Click to locate your file.

The Name field is automatically populated with your document name. You may change this name if you wish.

3. Enter a description, if desired.
4. Click .

You may attach additional documents if necessary.

Delete an attachment

Follow the steps below to delete an attachment.

1. On the Create Response tab, click the checkbox to select the attachment to delete, as show below.

2. Click .

The attachment is removed from the list.

3. Once you have completed the form, click .

The View Response tab is automatically activated, and displays a message that your expression of interest has been submitted.

Dashboard | Selections | Public Notifications | Profile

Notification
 ID: 102426 | Assignment: Survey of Japanese-... | Team Leader: Laura R. Conner | Status: REI Published

View Notification | Create Response | **View Response** | Shortlist Status

Your Expression of Interest has been successfully submitted. You may re-submit your expression at any time prior to the deadline. To update, click on the Create Response Tab and change the information, as needed. Once done, simple click on the submit button below. [?](#)

Printer Friendly Version

General Information

| | |
|-------------------------------|---|
| Assignment | Survey of Japanese-Brazilian Households in Brazil |
| Selection Number | 102426 |
| Notice Type | Request for Expressions of Interest |
| Notification Publication Date | 09/29/2006 |
| Deadline for Submission | 10/15/2006 |
| Language of the Notice | English |

At any time until the deadline, you may return to the Create Response tab to make changes and resubmit.

Once the deadline to express interest has passed, the Bank Group’s selection team will review and rank all expressions of interest they have received.

View the status of a submission

You may check the status of your submission at any time. Additional email notifications on status changes will also be sent to you. Delivery of email notifications can not be guaranteed however. Therefore, consultants should check their status directly on WBG eConsultant. Short list statuses include: EOI Drafting, EOI Submitted, Invited, and Not Invited.

1. To view the status of a submission, click the Shortlist Status tab.

Dashboard | Selections | Public Notifications | Profile

Notification
 ID: 102426 | Assignment: Survey of Japanese-... | Team Leader: Laura R. Conner | Status: REI Published

View Notification | Create Response | View Response | **Shortlist Status**

This page displays your Expression of Interest Status and if appropriate, all Short Listed Firms. [?](#)

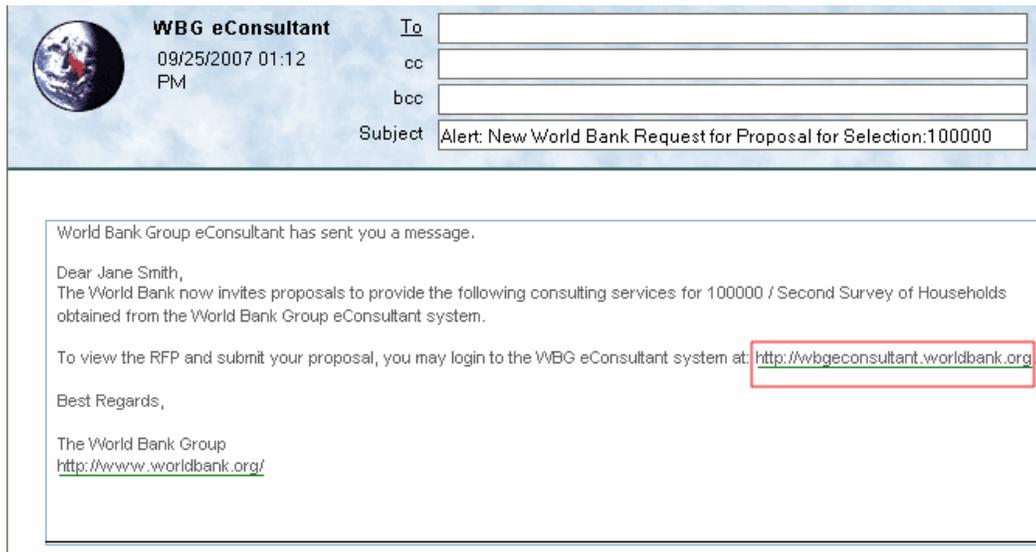
Short Listed Firms

| Firm Name | Short List Status | Contact Name | Contact Email Address | Contact Phone Number |
|----------------|-------------------|--------------|--|----------------------|
| Testing Firm N | EOI Submitted | First Last | Firm Selection Team for Testing Firm N | |

View RFP and submit proposals

WBG eConsultant enables short-listed consultant firms to first view and download the Request for Proposal (RFP) package and then confirm their intention to propose. Once you have confirmed, you may post Requests for Clarifications (RFCs), view responses to clarifications, and upload Technical and Financial proposals.

After the shortlisting process is complete, you will receive an email notifying you of the status of your expression of interest. If you were short listed, the email will contain a link to access the WBG eConsultant system.



1. To open WBG eConsultant, click <http://wbgeconsultant.worldbank.org>.
2. Log in to the WBG eConsultant system.
3. At the Dashboard page, click the Request for Proposal task hyperlink, as shown below.

| Selection Number | Selection Name | Project Number | Trust Funds Number | Selection Stage | Role | Tasks |
|------------------|-------------------------|---------------------|--------------------|-----------------|--------------|--------------------------------------|
| 102689 | Demonstration of Eco... | Not Project-Related | | Proposal | Firm Contact | Request For Proposal |
| 102688 | Survey of Japanese... | P098928 | TF054731 | Proposal | Firm Contact | Request For Proposal |

The Request for Proposal tab appears.

| Required Proposals | Technical and Financial | Requests for Clarification Deadline | Jun 22, 2006 11:59:59 PM |
|--------------------|-------------------------|-------------------------------------|--------------------------|
| Your Status | Invited | Proposal Deadline | Jun 22, 2006 5:00:00 PM |

| RFP Section | Document Title |
|------------------------|--------------------------------------|
| Section 1 | Letter of Invitation |
| Section 2 | Information to Consultants Datasheet |
| Section 3 | Technical Proposal Standard Forms |
| Section 4 | Financial Proposal Standard Forms |
| Section 5 | Terms of Reference |
| Section 6 | Contract |
| Additional Attachments | None |

I have read the RFP and confirm that I will submit a proposal by the deadline

Confirm to Propose

The Request for Proposal Tab (pre-confirmation) allows you to view key dates and to download sections of the RFP. Prior to submitting Requests for Clarifications and Proposals, you must confirm your intent to propose by clicking on the Confirm to Propose button.

1. To view or download an RFP document, click on the document title.

The File Download dialog box appears.

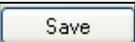
File Download

Do you want to open or save this file?

Name: Technical Proposal Standard Forms.doc
Type: Microsoft Word Document, 75.0 KB
From: wbes262.worldbank.org

Open Save Cancel

While files from the Internet can be useful, some files can potentially harm your computer. If you do not trust the source, do not open or save this file. [What's the risk?](#)

2. Click .

3. Navigate to the destination folder and save the document.
4. After you have read all the documents, and if you decide to submit a proposal, click **Confirm to Propose**

The page is updated and indicates that your firm is confirmed, as shown below.

| Dashboard | Selections | Public Notifications | Profile |
|---|---|--|--------------------------|
| Proposal | | | |
| ID: 102688 Assignment: Survey of Japanese-... Team Leader: Laura R. Conner Status: RFP Issued | | | |
| Request For Proposal | | | |
| Below are the sections of this RFP listed. ? | | | |
| Required Proposals | Technical and Financial | Requests for Clarification Deadline | Oct 28, 2006 11:59:59 PM |
| Your Status | Confirmed to Propose | Proposal Deadline | Oct 28, 2006 5:00:00 PM |
| RFP Package | | | |
| The following are the Request for Proposal documents. To view or download, click on the document title hyperlink. | | | |
| RFP Section | Document Title | | |
| Section 1 | Letter of Invitation | | |
| Section 2 | Information to Consultants Datasheet Evaluation Criteria | | |
| Section 3 | Technical Proposal Standard Forms | | |
| Section 4 | Financial Proposal Standard Forms | | |
| Section 5 | Terms of Reference | | |
| Section 6 | Contract | | |
| Additional Attachments | None | | |
| Your firm has confirmed that they will be submitting a proposal by the deadline | | | |
| | | | Withdraw |
| Requests for Clarification | | | Add RFC Question |

You now have access to upload proposal documents, and to make Requests for Clarification (RFCs).

Note: At any time before proposal deadline you may withdraw your proposal by clicking **Withdraw**.

Submit Request for Clarification (RFC)

You may post requests for clarification on any part of the Request for Proposal. Responses by the World Bank will appear in the Request for Clarification section and will be viewable by all firms. However, the names of the other firms will be hidden. You will receive an email when new responses have been posted.

| | | | |
|---|--|--|--------------------------|
| Below are the sections of this RFP listed. | | | |
| Required Proposals | Technical and Financial | Requests for Clarification Deadline | Oct 28, 2006 11:59:59 PM |
| Your Status | Confirmed to Propose | Proposal Deadline | Oct 28, 2006 5:00:00 PM |
| RFP Package | | | |
| The following are the Request for Proposal documents. To view or download, click on the document title hyperlink. | | | |
| RFP Section | Document Title | | |
| Section 1 | Letter of Invitation | | |
| Section 2 | Information to Consultants Datasheet Evaluation Criteria | | |
| Section 3 | Technical Proposal Standard Forms | | |
| Section 4 | Financial Proposal Standard Forms | | |
| Section 5 | Terms of Reference | | |
| Section 6 | Contract | | |
| Additional Attachments | None | | |
| Your firm has confirmed that they will be submitting a proposal by the deadline | | | Withdraw |
| Requests for Clarification | | | Add RFC Question |
| To request clarification about the RFP, write your questions in the discussion forum below. Questions that have been posted can not be removed or edited. World Bank will review all questions and respond. You may post requests for clarification up until the deadline. Only your firm selection team can view your questions. Your firm can not view questions posted by other firms. | | | |
| Source | RFC Notes | Posted Date | |

1. To request clarification, click **Add RFC Question**.

The New Subject dialog box appears.

| | |
|---|---|
| New Subject | |
| Subject | Scope of project |
| Message | Please provide the number of survey results required. |
| <div style="text-align: right;"> Cancel Send </div> | |

2. Type a subject and your question, then click **Send**.

The question appears in the Requests for Clarification Section.

| | | | |
|---|------------------|--------------------------|-------------------------|
| Requests for Clarification | | | Add RFC Question |
| To request clarification about the RFP, write your questions in the discussion forum below. Questions that have been posted can not be removed or edited. World Bank will review all questions and respond. You may post requests for clarification up until the deadline. Only your firm selection team can view your questions. Your firm can not view questions posted by other firms. | | | |
| Source | RFC Notes | Posted Date | |
| Peter's Firm | Scope of project | Oct 26, 2006 12:36:14 PM | |

- To view the question, click the title.

Responses to questions will also appear in the Requests for Clarification section. You will also receive an email notification that a response has been posted.

| Requests for Clarification | | Add RFC Question |
|---|--|--------------------------|
| To request clarification about the RFP, write your questions in the discussion forum below. Questions that have been posted can not be removed or edited. World Bank will review all questions and respond. You may post requests for clarification up until the deadline. Only your firm selection team can view your questions. Your firm can not view questions posted by other firms. | | |
| Source | RFC Note | Posted Date |
| Bank Staff | Response to question on the scope of the project | Oct 26, 2006 12:40:27 PM |
| Peter's Firm | Scope of project | Oct 26, 2006 12:36:14 PM |

- To view the response, click the title.

The response will appear.

| Requests for Clarification | | Add RFC Question |
|---|---|--------------------------|
| To request clarification about the RFP, write your questions in the discussion forum below. Questions that have been posted can not be removed or edited. World Bank will review all questions and respond. You may post requests for clarification up until the deadline. Only your firm selection team can view your questions. Your firm can not view questions posted by other firms. | | |
| Source | RFC Notes | Posted Date |
| Bank Staff | Response to question on the scope of the project Question: Please provide the number of survey results required. Answer: A total of 800 results is desired. | Oct 26, 2006 12:40:27 PM |
| Peter's Firm | Scope of project | Oct 26, 2006 12:36:14 PM |

Upload technical and financial proposals

You may add or delete multiple technical proposal documents any time before the proposal deadline. It is important that you follow the instructions.

Upload technical document

| Technical Proposal | | | | Upload Technical Document |
|--|----------------|---------------|-------------|---------------------------|
| To add a technical proposal upload your document using the Upload Technical Document link. You may submit multiple technical documents, however you must use the supplied standard formats and follow instructions as per the Technical Standard Form in the RFP package. You may add or delete documents up to the proposal deadline date and time. | | | | |
| Delete | Document Title | Uploaded Date | Uploaded By | |
| | | | | |

- To upload a technical proposal document, in the Technical Proposal section, click [Upload Technical Document](#).

The Upload document dialog box appears.

Upload A Document

File

Browse...

Name *

Description

Cancel Upload

*Indicates a required field

2. Click to navigate to the file you wish to upload.

The Name field is automatically populated with your document name. You may change this name if you wish.

3. Enter a description, if desired.
4. Click .

The document name appears in the Technical Proposal section.

| Technical Proposal | | Upload Technical Document | |
|--|--------------------|---------------------------|-------------|
| To add a technical proposal upload your document using the Upload Technical Document link. You may submit multiple technical documents, however you must use the supplied standard formats and follow instructions as per the Technical Standard Form in the RFP package. You may add or delete documents up to the proposal deadline date and time. | | | |
| Delete | Document Title | Uploaded Date | Uploaded By |
| <input type="button" value="Delete"/> | Technical Proposal | Oct 26, 2006 12:42:56 PM | Jane Doe |

5. To delete a document, click .

Upload Financial Proposal

Depending on the selection method, a financial proposal may also be required. If so, you will see the financial proposal section.

| Financial Proposal | | Upload Financial Document | |
|--|----------------|---------------------------|-------------|
| To add a financial proposal upload your document using the Upload Financial Document link. You may submit multiple financial documents, however you must use the supplied standard formats and follow instructions as per the Financial Standard Form in the RFP package. You may add or delete documents up to the proposal deadline date and time. | | | |
| Delete | Document Title | Uploaded Date | Uploaded By |
| | | | |

To upload a financial proposal click **Upload Financial Document** and follow the instructions on how to upload a document on page 17.

Specify Financial Proposal Amount

Specify the total cost of your proposal.

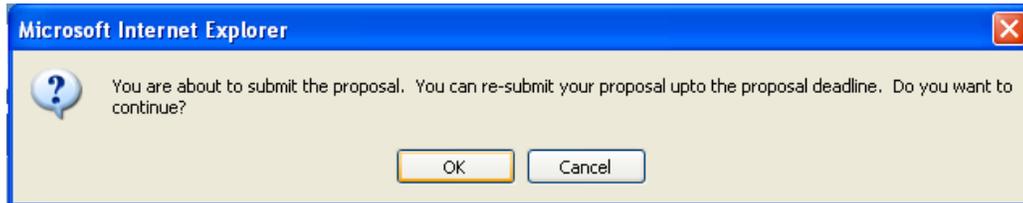
Note: Enter the currency amount without symbols or commas.

Submit proposal

Once your proposal is complete, it is time to submit it to the Bank Group.

1. Click **Submit Proposal**.

A confirmation message appears.



2. To submit, click **OK**.

Note: You may return at any time before the proposal deadline to make changes and resubmit.

You are automatically returned to the Dashboard page.

| Pending Actions | | | | | | |
|------------------|-------------------------|---------------------|--------------------|-----------------|--------------|--------------------------------------|
| Selection Number | Selection Name | Project Number | Trust Funds Number | Selection Stage | Role | Tasks |
| 102689 | Demonstration of Eco... | Not Project-Related | | Proposal | Firm Contact | Request For Proposal |
| 102688 | Survey of Japanese... | P098928 | TF054731 | Proposal | Firm Contact | Request For Proposal |

- To return to your proposal, click [Request For Proposal](#).

The Request for Proposal appears again.

| Request For Proposal | | | |
|---|---|--|--------------------------|
| Below are the sections of this RFP listed. | | | |
| Required Proposals | Technical and Financial | Requests for Clarification Deadline | Oct 28, 2006 11:59:59 PM |
| Your Status | Proposal Submitted | Proposal Deadline | Oct 28, 2006 5:00:00 PM |
| RFP Package | | | |
| The following are the Request for Proposal documents. To view or download, click on the document title hyperlink. | | | |
| RFP Section | Document Title | | |
| Section 1 | Letter of Invitation | | |
| Section 2 | Information to Consultants Datasheet Evaluation Criteria | | |
| Section 3 | Technical Proposal Standard Forms | | |
| Section 4 | Financial Proposal Standard Forms | | |
| Section 5 | Terms of Reference | | |
| Section 6 | Contract | | |
| Additional Attachments | None | | |

Your Status now displays [Proposal Submitted](#). You may return to this page at any time to check the status.

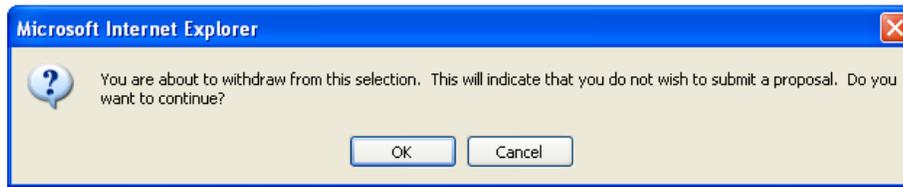
Note: Bank staff are prevented from viewing any proposal until the deadline for submission has passed.

Withdraw a proposal

If you now longer wish to participate in the selection, you may withdraw your proposal.

- On the Request for Proposal form, click [Withdraw](#).

A confirmation dialog box appears.



2. To withdraw, click .

This will remove your proposal from consideration, and your documents will not be viewable by World Bank Group staff.

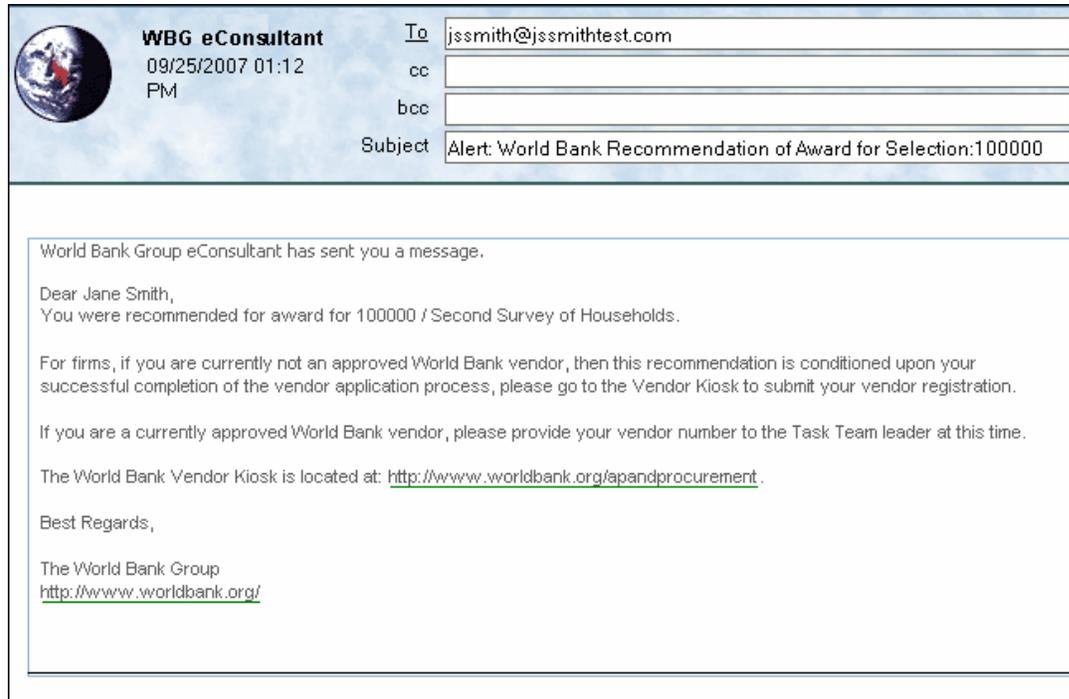
Evaluation of proposals

Once the deadline has passed, the task team for the selection will review and evaluate the proposals.

When the evaluation period is complete, the task team leader will contact and negotiate with the winning consultant firm. After the completion of negotiations, each firm can view their final status online. In addition, each firm will be sent an email confirmation on the final status of their proposal.

Negotiation and Award

If your proposal is selected by the World Bank Group, you will receive an email containing vendor registration information and a link to WBG eConsultant.



If you are an approved World Bank vendor and have a vendor number, please provide it to the Team Leader.

If you are not yet an approved vendor, you must complete a vendor application. You may access the Vendor registration at <http://www.worldbank.org/apandprocurement> .

1. Click the link for the Vendor Kiosk. <http://www.worldbank.org/apandprocurement>

The Corporate Procurement page appears.

The screenshot shows the World Bank Corporate Procurement page. The header includes navigation links: Home, Site Map, Index, FAQs, Contact Us. Below the header is a search bar with 'Corp. Proc' entered and a 'GO' button. The main content area is titled 'Corporate Procurement' and contains a paragraph: 'The Corporate Procurement Unit of the World Bank Group, is committed to creating an environment that fosters open, global, and transparent competition for the goods and services utilized by the Bank in its worldwide operations. We strive to balance the need for flexibility in the procurement process, and the demands to leverage volumes and optimize knowledge management from a procurement perspective'. To the left is a sidebar with a menu: Home, Bidding Opportunities, Vendor Kiosk (highlighted with a red box), Supplier Diversity, How to do business with the World Bank, Forms & Documents, Site Tools, and Contact Us. To the right is a 'Forms & Documents' section with a list of links: World Bank Group Purchase Order General Terms and Condition (July 2006), World Bank Group General Terms of Contract for Operational Consulting Services (July 2006), Supplier Diversity Company Profile Form, Security, Fire & Safety Regulations, Vendor Guide, and Information Security Policy for Contractors.

2. Click [Vendor Kiosk](#).

The Vendor Registration page appears.

The screenshot shows the World Bank Vendor Registration page. The header is the same as the previous page. The main content area is titled 'Vendor Registration' and contains a paragraph: 'Thank you for your interest in working as a vendor with the World Bank. The online registration should take approximately 15 minutes to complete.' Below this is a 'Please note' section: 'Please note: Completion of the application will not necessarily result in vendor being added to the Vendor Master File.' This is followed by a paragraph: 'To be able to access this application your computer must have Microsoft Internet Explorer version 4.0 or greater or Netscape version 6.1 or greater.' Below that is a link: 'Before registering, please review our [Vendor Guide](#) and [Vendor Eligibility Guideline](#).' A red box highlights the link: 'On-Line Registration Form'. At the bottom, a paragraph states: 'To register you must have an Email address, you must complete the form in English, and you must answer all the required fields.' The sidebar on the left is updated: 'Vendor Kiosk' is now highlighted with an orange box, and 'Vendor Registration' is a sub-link under it. The 'Forms & Documents' section on the right is also updated, with links: World Bank Group Purchase Order General Terms and Condition (July 2006), World Bank Group General Terms of Contract for Operational Consulting Services (July 2006), Supplier Diversity Company Profile Form, Security, Fire & Safety Regulations, Vendor Guide, and Information Security Policy for Contractors. A new 'What's New' section is added at the bottom right with the link: World Bank Group.

3. Click [On-Line Registration Form](#).

The Vendor Registration form appears.

The screenshot shows the 'Vendor Registration Form - Create Mode' page. At the top, there is a navigation bar with 'The World Bank Group' logo and links for 'Contact Us', 'Help/FAQ', 'Index', and 'Search'. Below this is a secondary navigation bar with links for 'Home', 'About', 'Countries', 'Data', 'Evaluation', 'Learning', 'News', 'Projects', 'Publications', 'Research', and 'Topics'. The main header area features a blue banner with the text 'Corporate Procurement and Accounts Payable Vendor Kiosk'. Below the banner, a breadcrumb trail reads 'Home > Procurement > Vendor Kiosk > Vendor Registration Form - Create Mode'. A horizontal menu contains five tabs: 'Instructions', 'Business Info', 'General Info', 'Qualifications', and 'Submit Form'. The 'Submit Form' tab is highlighted with a red rectangular border. The main content area is titled 'Instructions' and contains the following text: 'In order for businesses to be approved as a registered vendor companies must meet the requirements outlined in the World Bank [Vendor Eligibility Guidelines](#). Approved vendor status is not required for Companies to bid on contracts or submit proposals. The tabs above outline the steps of the registration process. Your application will not time-out if there is a period of inactivity. You will be required to verify entries and provide an electronic signature before submitting the application. Applications will remain valid in the system for 12 months. US Companies: Provide all required information. Companies based outside the US:

4. Complete the information for each tab, then click .

5. On the Submit Registration Form tab, click .

The screenshot shows the 'Submit Registration Form' page. At the top, there is a horizontal menu with five tabs: 'Instructions', 'Business Info', 'General Info', 'Qualifications', and 'Submit Form'. The 'Submit Form' tab is highlighted with a blue background and a mouse cursor is pointing at it. The main content area is titled 'Submit Registration Form' and contains the text: 'Please ensure that all Mandatory Information has been provided.' Below this text is a 'Submit Form' button, which is highlighted with a red rectangular border. At the bottom of the page, there is a footer with a globe icon and the text: 'Contact Us | Help/FAQ | Site Index | Search | Home ? 2002 The World Bank Group, All Rights Reserved. Terms and Conditions. Privacy Policy'.

You are returned to the Dashboard page.

On the Dashboard page, you will see the selection in your pending actions with a link to Award Notification.

| Pending Actions | | | | | | |
|------------------|------------------------|----------------|--------------------|-----------------|--------------|--|
| Selection Number | Selection Name | Project Number | Trust Funds Number | Selection Stage | Role | Tasks |
| 102190 | Survey of Japanese-... | P098928 | TF054731 | Award | Firm Contact | Award Notification Negotiation Conference |
| 102190 | Survey of Japanese-... | P098928 | TF054731 | RFP | Firm Contact | RFC-Proposal |

1. Click [Award Notification](#).

The Award Notification page appears.

| Award | | |
|--|--|-------|
| RFP | Technical Proposal | Award |
| ID: 102190 Assignment: Survey of Japanese-... Team Leader: Johan A. Mistiaen Status: Award Process Complete | | |
| Award Notification | Negotiation Conference | |
| <p>You have been selected for award for this assignment. If you are not a Bank approved vendor, please go to the Vendor Kiosk to submit your vendor registration. If you are an approved World Bank vendor, please contact the Task Manager with your Vendor Number.</p> | | |
| Viewed | | |

2. After reading the message about the award, click [Viewed](#).

The Negotiation Conference tab is activated.

| Negotiation Conference | | |
|-----------------------------------|-------------|-----------------------------|
| | | New Subject |
| Subject | Date | |
| • Number of staff | Oct 3, 2006 | |

Negotiations after the award may either take place offline through email or here in the WBG eConsultant Negotiation Conference.

1. To view messages posted by the World Bank, click the subject.

The body of the message appears.

Help For Consultant Firms

The screenshot shows a web interface with a navigation bar at the top containing 'Dashboard', 'Selections', 'Public Notifications', and 'Profile'. Below this is a header for 'RFP Technical Proposal Award' with details: 'ID: 102190 | Assignment: Survey of Japanese-... | Team Leader: Johan A. Mistiaen | Status: Award Process Complete'. The main content area is titled 'Negotiation Conference' and contains a list of messages. The first message has the subject 'Number of staff' and a date of 'Oct 3, 2006'. The message text is 'Please provide the number of staff who will be working on this project.' and the date and time is 'Oct 3, 2006 3:28:06 PM'. A 'Reply' button is highlighted with a red box next to the message.

2. To respond to the message, click **Reply**.

The Message Reply dialog box appears.

The screenshot shows a 'Message Reply' dialog box. It contains the following fields: 'Subject' with the value 'Number of staff', 'Message' with the text 'Please provide the number of staff who will be working on this project.', 'Reply Subject' with the value 'Re: Number of staff', and 'Reply Message' with the text 'There will be a total of 10 staff assigned to this project.'. A 'Reply' button is highlighted with a red box at the bottom of the dialog.

3. Enter your response, then click **Reply**.

Your reply appears in the Subject column.

The screenshot shows the same 'Negotiation Conference' interface as before, but now with two messages listed. The first message is 'Number of staff' with the date 'Oct 3, 2006'. The second message is 'Re: Number of staff' with the date 'Oct 24, 2006'. A 'New Subject' button is highlighted with a red box in the top right corner of the message list.

4. To create a new message, click **New Subject**.

New Subject

Subject Project Start Date

Message Please confirm whether the project can be started early. We are prepared to begin October 29, 2006.

Cancel **Send**

5. Type a subject and your message, then click **Send**.

Your message is now displayed.

Dashboard **Selections** **Public Notifications** **Profile**

RFP Technical Proposal **Award**

ID: 102190 | Assignment: Survey of Japanese-... | Team Leader: Johan A. Mistiaen | Status: Award Process Complete

Award Notification **Negotiation Conference**

This is a list of questions and answers in negotiation conference. Click on message subject to view full message thread.

| Negotiation Conference | | New Subject |
|------------------------|---------------------|--------------------|
| | Subject | Date |
| • | Project Start Date | Oct 24, 2006 |
| • | Number of staff | Oct 3, 2006 |
| | Re: Number of staff | Oct 24, 2006 |

After the vendor registration and negotiations are complete, the Task Team Leader will issue a Requisition for services. The World Bank Corporate Procurement office will be in contact with you to finalize the contract.

Update selection team information

Once you have set up your WBG eConsultant profile, you may want to view or change it. WBG eConsultant provides a simple way to do this.

| Pending Actions | | | | | | |
|------------------|------------------------|---------------------|--------------------|-----------------|----------------------------|-----------------------------------|
| Selection Number | Selection Name | Project Number | Trust Funds Number | Selection Stage | Role | Tasks |
| 102429 | Second Survey of Ja... | P098928 | TF054731 | Notification | Firm Contact | Shortlist Status View Response |
| 102427 | Test of Firm Select... | Not Project-Related | | Proposal | Firm Contact | Request For Proposal |
| 102406 | Demonstration of RF... | Not Project-Related | | Proposal | Non Selection Related Role | Request For Proposal |
| 101938 | Africa MSME Finance... | Not Project-Related | | Proposal | Non Selection Related Role | Request For Proposal |

Update Firm Background

- From the WBG eConsultant Dashboard page, click [Profile](#).

The Profile page appears.

| Background | | | | | | |
|--|---|--|--|--|--|--|
| Business Name | Clawson Associates | | | | | |
| Country where registered | United States | | | | | |
| Legal Form of Business | Partnership | | | | | |
| Address | 1511 University Blvd Washington DC 20433 | | | | | |
| Year Established | 2004 | | | | | |
| Full Time Employees | 3 | | | | | |
| DUNS Number | 0 | | | | | |
| Federal Tax ID | | | | | | |
| Existing World Bank Vendor Number | | | | | | |
| Are any owners/officers of the business former employees of the World Bank Group? | no value entered | | | | | |
| Do any owners/officers of the business have relatives who are currently employed by the World Bank Group? | no value entered | | | | | |

| Firm Contacts | | | | | | |
|-----------------------|-------------|-----------|--------------------|---------------|---------|--------------|
| Select | Name | Title | Email Address | Telephone No. | Fax No. | Contact Type |
| <input type="radio"/> | Ann Clawson | President | annclawson@cox.net | 202-555-5212 | | Primary |

- To make a change to your firm's background information, click [Update](#).

This opens the form for editing.

| Dashboard | Selections | Public Notifications | Profile |
|--|--|----------------------|---------|
| Display Company Profile | | | |
| Firm Background | | | |
| Business Name * | Clawson Associates | | |
| Legal Form of Business * | Partnership | | |
| Address * | 1511 University Blvd | | |
| Address 2 | | | |
| City * | Washington | | |
| State (mandatory if US) | DC | | |
| Region | | | |
| Zip / Postal Code | 20433 | | |
| Country where registered * | United States | | |
| Year Established * | 2004 | | |
| Full Time Employees * | 3 | | |
| DUNS Number | 0 | | |
| Federal Tax ID | | | |
| Existing World Bank Vendor Number | If you are already a World Bank Registered Vendor, please enter your Vendor ID. [input field] | | |
| Are any owners/officers of the business former employees of the World Bank Group? | <input type="radio"/> Yes <input type="radio"/> No | | |
| Do any owners/officers of the business have relatives who are currently employed by the World Bank Group? | <input type="radio"/> Yes <input type="radio"/> No | | |
| Back Save | | | |

3. Make your changes, then click **Save**.

Update Contact information

1. To update team contact information, scroll down to the Firm Contacts section.

| Background | | Update |
|--|-----------------------|--------|
| Business Name | Testing Firm M | |
| Country where registered | United States | |
| Legal Form of Business | Corporation | |
| Address | 123 Street City DC | |
| Year Established | 2006 | |
| Full Time Employees | 20 | |
| DUNS Number | 0 | |
| Federal Tax ID | 0 | |
| Existing World Bank Vendor Number | | |
| Are any owners/officers of the business former employees of the World Bank Group? | No | |
| Do any owners/officers of the business have relatives who are currently employed by the World Bank Group? | No | |

| Firm Contacts | | | | | | |
|--|----------------|-------------------------------------|--------------------------|---------------|---------|--------------|
| Add Contact Update Contact Remove Contact Make Primary Contact | | | | | | |
| Select | Name | Title | Email Address | Telephone No. | Fax No. | Contact Type |
| <input type="radio"/> | Jen Doe | | jendoe@thejkgroup.com | | | Primary |
| <input type="radio"/> | First Last | 0 | firstlast@thejkgroup.com | | | Secondary |
| <input type="radio"/> | Derrick Wilson | Vice President, Product Development | dwilson@firmone.com | 202 587 6313 | | Secondary |
| <input type="radio"/> | Schuyler Pratt | Director, New Products | spratt@firstlast.com | 123-456-7890 | | Secondary |
| <input type="radio"/> | Ann Clawson | Vice President | aclawson@firmh.com | 775-253-7931 | | Secondary |

2. To add a contact, click .

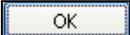
The Add Secondary Contacts screen appears.

| Dashboard | Selections | Public Notifications | Profile |
|-------------------------------|----------------------|----------------------|---------------|
| Display Company Profile | | | |
| Add Secondary Contacts | | | |
| First Name * | <input type="text"/> | | |
| Last Name * | <input type="text"/> | | |
| Title | <input type="text"/> | | |
| Telephone Number | <input type="text"/> | | |
| Fax Number | <input type="text"/> | | |
| Email Address * | <input type="text"/> | | |
| | | Back | Submit |

3. Enter the information for your new contact and click .

The new contact is added.

| Firm Contacts | | | | | |
|--|-------------|-----------|--------------------|---------------|--------------|
| Add Contact Update Contact Remove Contact Make Primary Contact | | | | | |
| Select | Name | Title | Email Address | Telephone No. | Contact Type |
| <input type="radio"/> | Ann Clawson | President | annclawson@cox.net | 202-555-5212 | Primary |
| <input type="radio"/> | Jane Forey | Dr. | jforey@cox.net | 202 554 5212 | Secondary |

- To update contact information, select the contact and click .
- Make your changes and click .
- To remove a contact, select the contact and click .
- At the warning, click .
- To change a secondary contact to the primary, select the contact and click .

If you need additional assistance, please contact the World Bank Group's Global Support Center by sending an email to wbgeconsultant@worldbank.org.