

**Request for Proposal (RFP) for
Development and Maintenance of
Observer Portal**

The Institute of Chartered Accountants of India (ICAI) invites tenders from reputed organization/s for developing and maintaining a web portal for handling all activities commencing from registration, appointment, allotment of assignment and ending with submission of reports/bill etc, relating to Observers in CA exams. Interested parties may visit www.icai.org for more details.

Secretary, ICAI

Background:

The Institute of Chartered Accountants of India (ICAI) invites tenders from reputed organization/s for developing and maintaining a web portal for handling all activities commencing from registration, appointment, allotment of assignment and ending with submission of reports/bill etc, relating to Observers in CA exams.

ICAI conducts examinations, at three levels, of the Chartered Accountancy Course:

- Common Proficiency Test (CPT)-of the nature of an entrance test
- Intermediate(IPC) examination.
- Final examination.

CPT is a one day test, held twice a year, generally in the third week of June and December.

Intermediate and Final exams are held twice a year, generally, in the first fortnight of May and November. They run in a continuous stretch of about 15 days, including on Sundays.

These exams are held in about 168 cities across India and abroad. Bigger cities are generally further sub divided into different zones. Each city may have one or more exam centers, i.e. Schools/Colleges where the exams are conducted. Thus, in all there are about 400 exam centres where the exams are generally conducted.

Both Inter and Final exams may be held in about 275 centres whereas only one of the exams say either Final or Inter may be held in the rest of the centres. In other words, both the exams are not necessarily held in all the centres.

The exams are conducted with the manpower support of the respective schools/colleges, as per the guidelines of the Institute, under the supervision of the Centre Superintendent, who is generally the Head Master/Principal of the College/School.

The Institute also appoints local Chartered Accountants as Observers to oversee the smooth conduct of the exams at the centres. They are generally appointed in the proportion of one for every 250 candidates. Generally there may be about 500 candidates in an exam centre. Thus there may be 2-4 Observers in a centre depending on the number of candidates who are allotted to the centre. They may be appointed for the entire duration of the exam, i.e. for 15 days or for specified days, as per their availability and the requirements.

The average number of Observers who handle the assignments is around 5000 in an exam cycle (including Intermediate IPC), Final and CPT.

Current Scenario:

Members who are desirous of taking up the assignment for a particular exam, apply for the same in the prescribed format. Announcement in this regard is available at <http://220.227.161.86/32147exam22241.pdf>, hosted on the students>examination link of www.icaai.org. The format of the application is available at http://icaai.org/app_forms/observer_may2014.html.

A panel of such city wise observers is prepared for each exam separately. Simultaneously, a list of exam centres with the number of observers required therein, for specified dates, is also prepared. Based on the above two lists, observers are appointed through a manual process and letters of appointment are issued to them. They are also required to give their acceptance of the assignment in the prescribed format. Some of them may decline the assignment for a variety of personal reasons, in which case, the said vacancies are re-allotted to other observers in the panel.

Observers are required to submit a daily report on the smooth conduct of the exam. These reports are generally submitted at the end of all the exams, for all the days together unless the situation in a particular centre, warrants otherwise.

Observers are paid a honorarium for the services rendered. They are also eligible for reimbursement of conveyance of specified amounts.

The reports received from the Observers, after the completion of the exams, are analysed and corrective action taken.

Proposal:

It is proposed to develop an Observer Portal to handle the following activities, for the May/June 2014 examinations.

Name of the portal

The portal may be called <http://observers.icaaiexam.icaai.org>

Eligibility requirements for being appointed as Observer for May 2014 :

Members who are enrolled on or before 1st April 2011 and whose membership is live as on 31st March 2014 will be eligible for being appointed as Observers for May 2014 examination. Detailed eligibility conditions and the empanelment form are hosted at <http://220.227.161.86/32147exam22241.pdf> on the students> examination link of www.icaai.org.

Time frame:

Intermediate and Final Exams are scheduled to commence on 26th May 2014 and end on 9th June 2014.

CPT exam is scheduled to be held on 22nd June 2014.

The portal is expected to be functional from 1st May 2014.

Hence, development, test run, security audit etc should be completed before the said date and the portal should be ready for commissioning on 1st May 2014.

Process flow:**Registration**

Registration will only be online. No manual registration will be permitted.

Observers will be required to register fresh for every exam separately. Registrations made for a particular exam will not be valid for any other exam held later.

A member can apply for appointment as an Observer, only in the city of his professional address, in the Institute's records. He cannot choose the city where he wants observership.

In multi zone cities, observer will have the option of choosing the zone where he wants observership.

He cannot choose the exam centre, i.e. the school/college where the exam will be held, in his city/zone.

Observership vacancies in each school/college are aggregated city wise (and in multi zone cities, zone wise) in to 4 blocks of dates, Group I or II of Intermediate or Final (Since both the exams are not necessarily held in all the schools/colleges).

He will have an option to choose the duty dates. Allotment will be made for a block of dates.

Once he has accepted duty for a certain block, he will not be permitted to once again apply for any other block in the same category.

Within each block, allotments will be done, random, on first come first served basis, on a dynamic basis, matching the vacancies with the demand.

Reserve Pool:

There will be a reserve pool for each exam centre, which will be equal to the actual number of vacancies in that centre. In other words, say if the number of vacancies in a centre is 4, allotments will be made online to 4 members and another set of 4 members will be kept in the reserve pool.

Vacancies arising due to declining by the members of allotments made will be filled up from the reserve pool.

Accordingly, system will allow registration upto twice the number of vacancies in each exam centre.

Appointment letters:

Once an Observer accepts the offer on the screen, he would be able to would print the appointment letters from the site, once they review and accept the offer of allotment.

Submission of reports/bills online:

The observers should be able to submit their bills and reports upon completion of the exams.

Scope of work:

1. Development of a web portal for handling the following activities:

- Registration/empanelment of observers for any exam.
- Online allotment of assignments to Observers, on a first come first served basis.
- Building up of a panel of wait listed members who will be considered for appointment as observer, in case of any decline by the original allottee.
- Downloading/printing of appointment letters by the Observers
- Online submission of reports and bills by Observers to be followed by signed print outs.
- Generation of various reports
- Communication with the observers-E-mail and SMS integration

2. Maintenance of the portal

- Provide access to the portal to the users from the appointed date and time for such period/extended period, as is stipulated by ICAI and its separate admin areas for the ADMIN appointed at ICAI.
- Ensure sufficient bandwidth and servers of such capacity which can handle the data traffic.
- Ensure that the portal is functional without any interruption during periods of peak load.

- Provide e-mail helpline support to the users for resolution of any technical or operational issues, by flashing the phone numbers and email-ids of the contact personnel on the home page and in all communications
- Resolve all technical issues whenever they arise, within the time frame as may be deemed necessary by ICAI, based on the criticality of the matter.

Eligibility criteria for submission of Bids:

- The organization should have handled similar assignment(s) of at least of one other organization in the last 3 years.
- Its average annual turnover during the past 3 years should be atleast Rs 5 crores. (Only the professional fees towards consultancy work/services provided will be accounted for) OR alternatively the organisation should be CMMI Certified (Level 3 and above). Preference will be given to those with CMMI certification (Level 3 and above)
- It should have an office at Delhi or NCR and should have support staff based in Delhi/NCR.
- It should not have been blacklisted by any Govt. or other public sector company/corporation/autonomous body/University/Board etc

How to apply:

Organisation/s desirous of applying may download the prescribed application form from the site, fill up the same and submit it along with the following documents duly signed by them:

- List of all projects where similar assignments were successfully handled during the last 3 years and details of their clients
- List of similar assignments that are being handled at present.
- Organisation information
- Name and postal address including telephone, fax numbers etc
- Copies of original documents defining the legal status, place of registration and principal places of business
- Names and titles of Directors and officers to be concerned with the work with designation of individuals authorized to act on behalf of the organization
- Information on any litigation in which the applicant was involved during the last 3 years including any current litigation
- Earnest Money Deposit (interest free) of Rs 10,000/- by way of a demand draft drawn in favour of the “Institute of Chartered Accountants of India”, payable at New Delhi.

Other terms and conditions:

1. The bidder shall submit its RFP in two parts, viz., Part I-Technical Bid and Part II-Financial Bid, in two separate envelopes.
2. Both the bids must be submitted on the bidder's letterhead.
3. The Technical Bid must be submitted in a separate envelope superscribed as "Technical". So also, the "Financial Bid" must be submitted in a separate envelope superscribed as "Financial". Both the envelopes must be put again in a sealed envelope.
4. The Financial bid has to be in two parts: a) One time Development charges and b) Maintenance charges for each exam cycle. Price quoted should be inclusive of service tax.
5. The envelopes containing the bids should be addressed to the Additional Secretary(Exams), Institute of Chartered Accountants of India, ICAI Bhawan C-1, Sector 1, NOIDA, and sent by post/courier **so as to reach before on or before 3rd April 2014.**
6. Bids received after the stated time and date would not be considered and are liable to be rejected.
7. Data security and accessibility and confidentiality are critical factors of the assignment.
8. The process flow should be in accordance with the requirements of the Institute with adequate controls and safeguards to ensure accuracy of data and reduce the transaction processing time.
9. The work is to be completed as per the time schedule prescribed by the Institute.
10. ICAI reserves the right to select or reject any/all the bid(s) including the lowest bid without assigning any reason and no correspondence in this regard shall be entertained.
11. ICAI takes no responsibility for delay, loss or non receipt of response to this RFP.
12. **A Pre-bid meeting will be held at 3.00 P.M. on 26th March 2014** at the Examination Dept. of ICAI located at C-1, Sector 1, NOIDA 201 301, to brief the prospective service providers about the requirements of ICAI and to clarify their doubts, if any.
13. The applicant organizations may be required to make a presentation before the selection committee of ICAI. The decision of this committee will be final and binding.

14. Technical bids will be opened on 4th April 2014 at 11.00 a.m. at C-1, Sector 1, NOIDA 201 301.

15. The date and time of opening of the financial bid shall be communicated to the short listed /technically qualified bidders.

16. ICAI reserves the right to assign the project to technically and financially viable bidder who may not be necessarily be the L1 bidder.

17. ICAI will get the software application so developed security audited by an agency approved by NIOC.

18. The applicant organizations may be required to make a presentation before the selection committee of ICAI. The decision of this committee will be final and binding.

19. The Initial order will be for one year which may be extended upon satisfactory performance.

Deliverables:

The deliverables includes the following:

- Design documents based on the specifications of ICAI for ICAI sign off.
- User Manual, Admin Manual, test cases, Test Plan and QA results for user acceptance testing.
- Application code, Web APIs.

Payment terms:

- 85% of the portal development charges and the maintenance charges shall be payable on successful implementation of the project, for the May/June 2014 exam cycle.
- Balance 15% will be paid upon successful implementation of the project for the Nov/Dec 2014 cycle.
- No advance will be paid.

Important Features/Dates:

Activities	Date
Pre bid meeting	At 3.00 P.M. on 26 th March 2014 at

	ICAI Bhawan C-1, Sector I, NOIDA 201 301
EMD	Rs 10,000/- by way of Demand Draft drawn in favour of the Institute of Chartered Accountants of India, payable at New Delhi
Last date for submission of bids	3 rd April 2014
Opening of the Technical Bid	At 11.00 a.m. on 4 th April 2014 at ICAI Bhawan C-1 Sector 1 NOIDA 201 301
Service Tax	Rate quoted should be inclusive of service tax for: One time development charges and Maintenance charges for each exam
Likely date for issue of work order	7 th April 2014
Project to be completed and portal commissioned by	1 st May 2014

Application form

1. Name of the firm/company
2. Physical address
3. Address of the company at New Delhi
4. Contact details(Telephone/E mail/Fax):
5. Date of incorporation/registration
6. Date of commencement of business
7. Net worth of the company/firm
8. Name(s) of the directors
9. Names of the major customers

10. Details of examination related assignments handled in the past

11. Current examination related assignments on hand

12. Details of turnover for the past 5 years:

13. (Attach copies of audited annual accounts for the past 3 years)

14. Details of turnover attributable to consultancy services (i.e. excluding material or labour components of the assignments handled)

15. Number of employees:

16. Of which the number of technical personnel :

17. Persons authorized by the company to execute documents on its behalf, with ICAI

18. Details of EMD (DD details):

Declaration

We hereby declare that the above information furnished above is true to the best of knowledge and information and if it is discovered at a later date that any or all of the above information is incorrect, we shall be disqualified and that if the assignment is already awarded, ICAI shall will be within its rights to cancel the contract forthwith without assigning any reasons whatsoever.

Place;

Date:

Signature

