

Addendum 2

SEL. : 2017-CC1525-SA-MON00-R1

Title: Request for Supply Arrangement (RFSA) for the provision of Monitoring Services in support of Canadian International Development Assistance Projects and Programs.

A. AMENDMENT TO THE REQUEST FOR SUPPLY ARRANGEMENT (RFSA)

1. RFSA, Section 2: "Technical Proposal – Standard Forms", TECH-4 "Proposed Individual" From TECH-4A "Curriculum Vitae for Proposed Individual":

- i) Table section "Guidance to Bidders":
DELETE the limit of pages: "six (6)".
INSERT the limit of pages: "ten (10)".
- ii) Table section "Sectoral Experience (Criteria M2, M3, and Criterion R 2)":
DELETE the Table section Note in its entirety.
INSERT the following Table section Note:

"Note: The Bidder should use the following format to present each assignment where the Proposed Individual provided Monitoring Services or technical subject matter expertise (during the last 15 years) in reverse chronological order.

When the assignment comprises of the provision of Monitoring Services or technical subject matter expertise and other services (such as Management or project management roles, monitoring and evaluation services), the Bidder is requested to indicate the level of effort dedicated for the provision of Monitoring Services and/or for the provision of technical subject matter expertise. Otherwise, DFATD will not consider the assignment in the evaluation."

- iii) Table section "Description of the Proposed Individual's roles and responsibilities in the Assignment", (b);

DELETE the sentence "*Demonstrate that the assignment constitutes sectoral experience providing services (...).*"

INSERT the following sentence: "*Demonstrate that the assignment constitutes sectoral experience providing Monitoring Services or technical subject matter expertise in international development as requested per Mandatory Criteria M3 and Rated Technical Sub-Criterion R 2.2.*"

ACCORDING to the "REVISED FORM TECH-4A "Curriculum Vitae for Proposed Individual" attached to this Addendum #2.

2. RFSA, Section 5 "Evaluation Criteria", "General Instructions (For All Sectors)", Definitions:

INSERT the following sentences to the end of the RFSA "Technical Assignment" Definition: "An assignment with specific duties, deliverables and specific period, which involved a level of effort of at least twenty (20) Days on the part of the Proposed Individual. An Assignment can be part of a full-time job."

AS FOLLOW:

“**Technical Assignment**” means an assignment where the Proposed Individual is directly responsible for the provision of technical subject matter expertise. Management or project management roles, Project monitoring and evaluation assignments are considered, if and

only if, they include provision of technical component and the Bidder provides the level of effort and description associated to the technical component only.

An Assignment with specific duties, deliverables and specific period, which involved a level of effort of at least twenty (20) Days on the part of the Proposed Individual. An Assignment can be part of a full-time job.”

3. RFSA, Section 5 “Evaluation Criteria”, Mandatory Technical Criterion M3 “Sectoral Experience in International Development”:

DELETE the criterion M3 in its entirety.

INSERT the following criterion M3:

“Sectoral Experience providing Monitoring Services or technical subject matter expertise in International Development

Using form TECH-4A, the Bidder must demonstrate that the Proposed Individual has:

For All Sectors except for Extractives

a minimum of 750 cumulative Days of sectoral experience providing Monitoring Services or technical subject matter expertise **in International Development** in the last fifteen (15) years.

For Extractives Sector

a minimum of 600 cumulative Days of sectoral experience providing Monitoring Services or technical subject matter expertise **in International Development** in the last fifteen (15) years.”

4. RFSA, Section 5 “Evaluation Criteria”, Rated Technical Criterion R 2:

DELETE the criterion title: “Sectoral Monitoring Services Experience”

INSERT the criterion title: “Sectoral Services Experience”

5. RFSA, Section 5 “Evaluation Criteria”, Rated Technical Criterion R 2.2 “Sectoral Experience in International Development”:

DELETE the criterion R 2.2 in its entirety.

INSERT the following criterion R 2.2:

“Sectoral Experience providing Monitoring Services or technical subject matter expertise in International Development

Using form TECH-4A, the Bidder should demonstrate that the Proposed Individual has sectoral experience providing Monitoring Services or technical subject matter expertise in International Development in the last fifteen (15) years.

For all sectors except Extractives:

Scoring (up to 60 points):

- Over 750 cumulative Days, but less than 1,150 cumulative Days: 36 points;
- 1,150 cumulative Days or more, but less than 1,500 cumulative Days: 50 points; and
- 1,500 cumulative Days or more: 60 points.

For Extractives Sector:

Scoring (up to 60 points):

- Over 600 cumulative Days, but less than 900 cumulative Days: 36 points;
- 900 cumulative Days or more, but less than 1,200 cumulative Days: 50 points; and
- 1,200 cumulative Days or more: 60 points.”

6. RFSA, Section 5 “Evaluation Criteria”, Criterion 3 “Demonstrated Monitoring Capabilities”, first paragraph:

INSERT the words: “as set out in the RFSA GTORS, paragraph 3.2.” at the end of the first paragraph.

AS FOLLOW:

“Using form TECH-4B1, the Bidder should describe two (2) distinct sectoral monitoring services assignments in the last (15) years to demonstrate that the Proposed Individual has provided Monitoring activities, as set out in the RFSA Generic Terms of Reference (GTOR), paragraph 3.2.”

7. RFSA, Section 5 “Evaluation Criteria”:

INSERT to the Section 5: “Evaluation Criteria” the Appendix I “Criteria 4 Demonstrated Technical Capabilities (General Description of Technical Assignment Component)” attached to this Addendum #2.

8. RFSA, Section 5 “Evaluation Criteria”, Criterion 4 “Demonstrated Technical Capabilities”, first paragraph:

INSERT the words: “as set out in the Section 5: “Evaluation Criteria”, Appendix I “Criteria 4 Demonstrated Technical Capabilities (General Description of Technical Assignment Component)” at the end of the first paragraph.

AS FOLLOW:

“Using form TECH-4B2, the Bidder should describe two (2) distinct Sectoral Technical Assignments in the last fifteen (15) years to demonstrate that the Proposed Individual provided at least one (1) out of the five (5) following types of activities, as set out in the Section 5: “Evaluation Criteria”, Appendix I “Criteria 4 Demonstrated Technical Capabilities (General Description of Technical Assignment Component)”.”

B. QUESTIONS AND ANSWERS

Question 1: Section 1 - ITB 4.3 states: "An individual may participate as a Proposed Individual in more than one Proposal, but only if each Proposal is for distinct Sectors. If an individual commits to participate in multiple Proposals for the same Sector, the individual will be rejected and will not be eligible to qualify in that Sector."

Does this mean that if a resource has already been proposed and/or already been accepted as a resource in an existing SA that resource will not be accepted in our proposal?

Answer 1: Yes, if an individual commits to participate in multiple proposals for the same Sector, the individual will be rejected and will not be eligible to qualify in that sector. If the proposed

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individual is already qualified in an existing SA, in a particular sector, the proposed individual is not eligible to qualify under another SA in that sector.

Question 2: Please confirm that only resources bid in our proposals will be accepted for any requirements that come out of this RFSA and that we are not permitted to replace the resource if he is not available?

Answer 2: Only individuals that have been qualified under an SA will be accepted for solicitation processes under the SA. Therefore, SA Holders will not be permitted to replace the Qualified Individual if he or she is not available.

Question 3: If we are submitting a proposal for Sector 2 are we bidding for the Sector including all Sub-sectors or do we need to propose individuals for the Sub-sectors.

Answer 3: Bidders are bidding for the Sector including one or more Sub-sectors.

Question 4: Would it be correct to include all assignments that included the activities from the GTORS 3.2 in TECH-4B1 as monitoring assignments?

Answer 4: Yes, it is correct to include all assignments in the sector of the proposal that included the activities from the GTORS 3.2 in TECH-4B1 as monitoring assignments. See amendment 6 to the Section 5 "Evaluation Criteria", Criteria 3 "Demonstrated Monitoring Capabilities" above.

Question 5: Would it be correct to include assignments in the sector of the bid that included the list of activities from RFSA SEL.: 2015-FC76100-SA-TS01 in TECH-4B2?

Answer 5: TECH-4B2 includes assignments in the sector of the proposal. Each assignment should describe only one of the activities as set out in the Section 5: "Evaluation Criteria" Appendix I "Criteria 4 Demonstrated Technical Capabilities (General Description of Technical Assignment Component)" attached to this Addendum.

Question 6: Would it be correct to include BOTH monitoring and technical assignments demonstrating the provision of monitoring services and technical services in TECH-4A?

Answer 6: See amendments 1, 3, 4, and 5 to the Form TECH-4A and Section 5: "Evaluation Criteria" M3 and R 2.2 to this Addendum #2 above.

Question 7: While the TECH-4s refer to Monitoring Services, the Evaluation Grid calls for "Sectoral Monitoring Services". Unlike monitoring services and technical services and sectors, the term "Sectoral Monitoring Services" is not defined at any point in the document. The different sectors that the department would like monitors to have expertise in are outlined in the GTORS. Will monitoring services in TECH-4A and TECH-4B count ONLY if they were performed in the sector for which the bid is submitted?

Answer 7: Yes, Monitoring Services in Forms TECH-4A and TECH-4B count ONLY if they were performed in the sector for which the proposal is submitted. Except for Mandatory Technical Criteria M3 and Rated Technical Criteria R 2.2. See amendments to the Section 5: "Evaluation Criteria" M3 and R 2.2 and to the Form TECH-4A to this Addendum #2.

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Question 8: Does the definition from p. 44 where an assignment is defined as: “a mandate with specific duties, deliverables and specific period, which involved a level of effort of at least twenty (20) Days per year for a three (3) year minimum duration” apply to only TECH-4B1, as was the case to get full points under SEL#: 2013-CC1525-SA-MON00 or to all the TECH-4s? It would be very rare to get a technical services contract for 20 days per year over 3 years.

Answer 8: Yes, the Definition “Assignment” applies to Form TECH-4A and TECH-4B1. See the amendment to the “Technical Assignment” Definition above for Technical Assignment minimum level of effort above.

Question 9: Under Section 5: Evaluation Criteria, page 44 it defines technical assignment as : *“means an assignment where the Proposed Individual is directly responsible for the provision of technical subject matter expertise. Management or project management roles, Project monitoring and evaluation assignments are considered, if and only if, they include provision of technical component and the Bidder provides the level of effort and description associated to the technical component only.”*

Unfortunately there is no description of what is meant by “technical component”. May we assume “technical component” is anything that can fall under “General Description of Monitor’s Activities” as described on Page 33-34 in the Terms of Reference? If not, please clarify.

Answer 9: See Amendment 7 and Answer #5 to this Addendum #2.

Question 10: Can a qualifying assignment be active, not-completed? If the monitoring assignment (R 2.1 and 2.3). has to have been completed to qualify, then all monitoring assignments contracted after 15th June 2013 would be invalidated for awarding of points in R 2.1 and 2.3 (15th June 2016 less 3 years).

Answer 10: See Section: 5 “Evaluation Criteria”, General Instructions (For All Sector), content of proposals, page 45, Scenario 2.

ALL OTHER TERMS AND CONDITIONS REMAIN UNCHANGED

**FORM TECH- 4
PROPOSED INDIVIDUAL
REVISED FORM TECH-4A**

CURRICULUM VITAE FOR PROPOSED INDIVIDUAL

<u>Guidance to Bidders:</u>				
TECH-4A is limited to ten (10) pages. The information below will be used to evaluate Mandatory and Rated Technical Criteria of this RFSA. The information provided in this Form will also be used to identify and select SA holders for Contracts under the resulting Supply Arrangement.				
General Information regarding the Proposed Individual				
Name of the Proposed Individual: <input type="text" value="Click here to enter text"/>				
Citizenship: <input type="text" value="Click here to enter text"/>				
Location (city, country): <input type="text" value="Click here to enter text"/>				
Sector and Sub-sector: <input type="text" value="Click here to enter t text"/>				
Languages				
Language Proficiencies:	Language	Proficiency Ratings		
<i>Description of Proficiency Ratings are available at http://www.international.gc.ca/ifait-iaeci/test_levels-niveaux.aspx?lang=eng</i>		Oral	Reading	Writing
	English	[]	[]	[]
	French	[]	[]	[]
	Others <i>(list any other languages)</i>	[]	[]	[...]
Former Canadian Public Servant				
Former Canadian Public Servant (FPS) Status:	<input type="text" value="Click here to enter text"/>			
<i>Is (will) the Proposed Individual (be) a Former Canadian Public Servant (FCPS) in receipt of a government pension and/or the beneficiary of a buy-out lump sum payment?</i>				

Academic Qualifications and Professional Development (Criterion M 1 and Sub-criterion R 1.1)	
Education:	[For each degree/diploma, indicate the degree/diploma title, area of study, the Institution, and conferred month and Year]
Sectoral Services Experience (Criteria M 2, M 3, and Criterion R 2)	
<p><i>Note: The Bidder should use the following format to present each assignment where the Proposed Individual provided Monitoring Services or technical subject matter expertise (during the last 15 years) in reverse chronological order.</i></p> <p><i>When the assignment comprises of the provision of Monitoring Services or technical subject matter expertise and other services (such as Management or project management roles and evaluation services), the Bidder is requested to indicate the level of effort dedicated for the provision of Monitoring Services and/or for the provision of technical subject matter expertise. Otherwise, DFATD will not consider the assignment in the evaluation.</i></p>	
Assignment title: [Click here to insert text]	
Assignment start date / completion date: [Click here to enter text]	Level of effort providing Monitoring Services: [Indicate number of Days worked for the provision of Monitoring Services or technical subject matter expertise]
Related Sector: [Click here to enter text]	In Developing Country(ies) Level of effort: [Indicate country and number of Days worked in the country]
Position/role of Proposed Individual: [Click here to enter text]	Employer: [Click here to enter text]
Assignment's funding agency: [Click here to enter text]	Reference: [Name and E-mail Address or Phone number]
<p>Description of the Proposed Individual's roles and responsibilities in the Assignment:</p> <p>(a) <i>Demonstrate that the assignment constitutes sectoral experience providing Monitoring Services as requested per Mandatory Criteria M2 and Rated Technical Sub-Criterion R 2.1.</i></p> <p>(b) <i>Demonstrate that the assignment constitutes sectoral experience providing Monitoring Services or technical subject matter expertise in international development as requested per Mandatory Criteria M3 and Rated Technical Sub-Criterion R 2.2.</i></p> <p>(c) <i>Demonstrate, if applicable, that all or part of the assignment constitutes sectoral experience working in-country, in a developing country, providing Monitoring Services (if applicable, indicate country/number of Days worked in-country) as requested per Rated Technical Sub-criterion R 2.3.</i></p> <p>(d) <i>Demonstrate the Proposed Individual's experience with stakeholders in the context of this assignment as requested per Rated Technical Sub-criterion R 2.4.</i></p>	

Section 5: Evaluation Criteria - Appendix I
Criteria 4 Demonstrated Technical Capabilities
(General Description of Technical Assignment Component)

The activities of the Proposed Individuals may include, but are not limited to the following:

A) Strategic Research, Analysis and Advice

- participate in the preparation and/or assessment of policy documents, corporate strategies, country programming frameworks, country strategies, Sector strategies and institutional strategies, and ensure the integration of a results-based approach, where relevant;
- Undertake background research and analysis and provide advice on specific topics, including Sectors, Sub-sectors, themes, best practices, lessons learned, emerging trends and knowledge of the work of leading organizations;
- Carry out analyses and make recommendations on policy and programming options;
- Assess, analyse and make recommendations on the integration of DFATD's cross-cutting themes into DFATD's development/operational policies;
- Provide analyses and comments on documents produced by partners and other stakeholders, including Sector and institutional strategies and programming frameworks;
- Prepare or analyse due diligence and risk assessments;
- Provide advice and support in planning and holding stakeholder consultations;
- Prepare oral reports, written reports, briefing notes and talking points on specific issues related to DFATD policies, programming, strategies and frameworks.

B) Feasibility and Scoping Studies

- Prepare and/or assist with Sector and Sub-sector feasibility studies and scoping for programming possibilities, including leading or taking part in field missions to carry out research and analysis for feasibility studies and scoping;
- Assess, analyse and make recommendations on the integration of DFATD's crosscutting themes into feasibility and scoping studies;
- Undertake research and analysis, including context analysis, political economy analysis and/or peace, conflict and fragility assessment in a specific country or region;
- Organize and partake in consultations/interviews with country level stakeholders to assess the political and economic incentives which impact on the feasibility of working in the country context within a specific Sector, Sub-sector; includes planning and facilitating multi-stakeholder consultations if needed;
- Assess the needs and priorities of developing country partner, countries, region or institution vis-à-vis development policies and thematic priorities of Canada, and the position of Canada in relation to that of other key donors;
- Assess results achieved by international assistance efforts (of Canada, other donors, multilateral agencies and emerging donors) to date in the developing country partner (may be multiple countries or a region) including lessons learned and practices that proven a "good fit" for the context;

- Conceptualize the most appropriate approach for support in the Sector or Sub-sector for support, including most appropriate local partners, and appropriate types of programming in a given developing country partner, countries, or regions;
- Prepare oral reports, written reports, briefing notes and talking points, which include high-quality analysis and recommendations to advise DFATD on the feasibility and/or options of investing in Sector or Sub-sector in a developing partner country, countries, or regions;
- Provide analyses and comments on documents produced by partners and other stakeholders, which are pertinent to the feasibility of investing in the Sector or Sub-sector in a developing partner country, countries, or regions

C) Project/Program Design and Planning

- Undertake research, diagnoses, assessments and information gathering, including sex-disaggregated baseline data, related to project/program design;
- Participate in field missions to plan and carry out project/program design and planning;
- Participate in consultations with stakeholders, including planning and facilitating multi-stakeholder consultations, and advise on participatory approaches in the planning process;
- Analyse and advise on DFATD's potential partners' institutional capacity related to project/program design, planning and implementation, management for results, and DFATD's cross-cutting themes;
- Organise and facilitate results-based project design workshops or working sessions with the DFATD team and stakeholders;
- Assist in the preparation of option papers, concept papers and project approval documents, including the development of project logic models (LM) and LM narratives, performance management frameworks (PMF) and PMF narratives, monitoring plans, risk registers, management plans and terms of reference, in accordance with DFATD's results-based management methodology, terminology and tools;
- Assess, analyse and make recommendations on the integration of DFATD's crosscutting themes into project/program design and planning documents;
- Provide analyses and comments on documents produced by partners and other stakeholders, including project/program proposals;
- Prepare oral reports, written reports, briefing notes and talking points on specific issues related to the design and planning of DFATD projects and programs.

D) Development of Tools/Guidelines, Training & Capacity Development

- Assess the training and capacity development needs (institutional and individual) of DFATD, partners and stakeholders regarding the Sector or organisation and the integration of DFATD's cross-cutting themes;
- Research and assess needs for Sector and Sub-sector tools and guidelines, assess existing tools and guidelines, and the integration of DFATD's cross-cutting themes;
- Prepare or assist in the preparation and/or assessment of capacity building and institutional strengthening strategies and initiatives;
- Assist in the identification, selection, and establishment of links with institutions/organizations in recipient countries, Canada and elsewhere to deliver training, coaching programs, and information sessions;

- Prepare or assist in the design and development of Sector-specific tools, guidelines, material for training, coaching programs, and/or information sessions in accordance with DFATD policy, format, methodology and content requirements;
- Lead or take part in delivering training, coaching programs, information sessions, and/or technical assistance to DFATD's partners in recipient countries, Canada and elsewhere;
- Assess, analyse and make recommendations on the integration of DFATD's cross-cutting themes and results-based management into the development of tools and guidelines, training and coaching programs and capacity development plans and initiatives;
- Research, analyse and make recommendations on Canadian and international sectoral trends and best practices to develop and enhance tools, guidelines, training, coaching and capacity building;
- Assist in the organisation and facilitation of knowledge-sharing events and policy dialogue events;
- Prepare oral reports, written reports, briefing notes and talking points on specific issues related to the development of tools and guidelines, training and capacity development;

E) Institutional Performance Assessment, Reform and Relationship Building

- Assess and analyse institutional performance and development results reports;
- Provide advice and support in organisational change management and institutional reform;
- Prepare or analyse institutional Due Diligence and Fiduciary Risk assessments in accordance with DFATD policy, format, methodology and content requirements;
- Assess and analyse DFATD's relationships with institutional partners;
- Assess and provide support in institutional oversight practices/systems such as budget (program versus administrative costs), financial reports (financial statements, audits and internal controls) and human resources management;
- Provide advice and support in corporate governance issues such as institutional Board roles and responsibilities, decision making processes, guidelines and structures;
- Prepare oral reports, written reports, briefing notes and talking points on specific issues related to the institutional performance assessment and relationship building.