
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 1: (iii) "Data Sheet" RFSA, page 17, Section 1: (iii) "Data Sheet", Definition t, 7.3:
DELETE the date: "October 11, 2016".
INSERT the date: "October 25, 2016"
2. RFSA, Section 2: "Technical Proposal – Standard Forms", Form TECH-4A "Curriculum Vitae for the Proposed Individual", under the table section "Level of effort providing Monitoring Services":

INSERT a new cell with the following text:

"Level of effort providing technical subject matter expertise:

[Indicate number of Days worked for the provision of technical subject matter expertise for Criteria M3 and R 2.2 only, if applicable]."

As showed in the Form TECH-4A "Curriculum Vitae for the Proposed Individual" attached to this Addendum #3.

3. RFSA, Section 5 "Evaluation Criteria", Mandatory Technical Criterion M2 "Monitoring sectoral experience", first paragraph:

INSERT the words: "provide the Assignment(s) demonstrating" in the sentence.

As follow:

"Monitoring sectoral experience

Using form TECH-4A, the Bidder must provide Assignment(s) demonstrating that the Proposed Individual has:"

4. RFSA, Section 5 "Evaluation Criteria", Mandatory Technical Criterion M3 "Sectoral Experience providing Monitoring Services or technical subject matter expertise in International Development", first paragraph:

INSERT the words: "provide the Assignment(s) demonstrating" in the sentence.

As follow:

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

Using form TECH-4A, the Bidder must provide Assignment(s) demonstrating that the Proposed Individual has:"

5. RFSA, Section 5 "Evaluation Criteria", Rated Technical Criterion R 2:

DELETE the criterion title: "Sectoral Services Experience"

INSERT the criterion title: "Sectoral Experience"

6. RFSA, Section 5 "Evaluation Criteria", Rated Technical Criterion R 2.1 "Sectoral Monitoring Services experience", first paragraph:

INSERT the words: "provide the Assignment(s) demonstrating" in the sentence.

As follow:

“Sectoral Monitoring Services experience

Using form TECH-4A, the Bidder should provide the Assignment(s) demonstrating that the Proposed Individual has sectoral experience providing Monitoring Services in the last fifteen (15) years.”

7. RFSa, Section 5 “Evaluation Criteria”, Rated Technical Criterion R 2.2 “Sectoral Experience providing Monitoring Services or technical subject matter expertise in International Development”, first paragraph:

INSERT the words: “provide the Assignment(s) demonstrating” in the sentence.

As follow:

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

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

8. RFSa, Section 5 “Evaluation Criteria”, Rated Technical Criterion R 2.3 “In Developing Country Sectoral Monitoring Experience”, first paragraph:

INSERT the words: “provide the Assignment(s) demonstrating” in the sentence.

As follow:

“In Developing Country Sectoral Monitoring Experience

Using form TECH-4A, the Bidder should provide the Assignment(s) demonstrating that the Proposed Individual has sectoral experience working in-country, in a developing country, providing Monitoring Services in the last fifteen (15) years.”

9. RFSa, Section 5 “Evaluation Criteria”, Rated Technical Criterion R 2.4 “Sectoral Experience with Stakeholders”, Scoring paragraph:

DELETE the scoring paragraph in its entirety

INSERT the following scoring paragraph:

“Scoring (up to 25 points):

- Experience with 1 type of stakeholders: 10 points;
- Experience with 2 types of stakeholders: 18 points; and
- Experience with 3 types of stakeholders: 25 points.”

As showed in the Section 5: “Evaluation Criteria”, attached to this Addendum #3.

B. QUESTIONS AND ANSWERS

Question 1: Could DFATD clarify the definition of “Assignment” as outlined in Section 5 (a) (p.44 of the TOR) – will DFATD only consider assignments of three year or longer duration as part of a consultant’s experience to be included in TECH-4?

Answer 1: Yes, DFATD operational needs are for mandate of monitoring services over a long period that are between 3 and 5 years. DFATD is seeking for equivalent experience.

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Question 2: Question 3 in Addendum 1 confirms that Criterion 2 will be assessed based on information provided in form TECH-4A. The Form explanation note under “sectoral experience” field suggests that only assignments containing an element of monitoring services should be included. Is it acceptable to use this field to present further sectoral international development experience in order to fulfil Criteria M3 and Criterion R 2.2, if an assignment did not include an element of monitoring services?

Answer 2: Form TECH-4A has been amended. See amendment 1 to this Addendum #3.

Question 3: Could DFATD confirm that TECH-4B1 and TECH-4B2 only require detailed descriptions of 2 assignments each?

Answer 3: DFATD confirm that TECH-4B1 and TECH-4B2 requires detailed description of 2 assignments each.

Question 4 Would DFATD accept the same project as an example to be used in both TECH-4B1 and TECH-4B2, if the project encompassed different tasks performed by the consultant?

Answer 4: See amendments 6 and 7 of the Addendum #2 published at <https://buyandsell.gc.ca/procurement-data/tender-notice/PW-16-00743613>

Question 5: Section 5 “Evaluation Criteria”, Page 44 of the RFSA document, provides a definition of the assignment as follows: “*Assignment*”: *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, on the part of the Proposed Individual. An Assignment can be part of a full-time job.*”

We have qualified candidates who have experience working in assignment which involved 20+ days LoE, but over a course of minimum 3 months or 6 months duration. Would the client please amend the duration for an assignment to be minimum 3 months vs 3years?

Answer 5: No. See Answer 1 of this Addendum #3.

Question 6: Where on TECH 4A are ‘Days’ relating to Criterion R 2.2, *Sectorial Experience in International Development* to be presented? The space on Form TECH 4A only provides for the Level of effort providing Monitoring Services; In-developing Country(ies) Level of effort

Answer 6: Form TEHC-4A has been amended. See amendment 1 to this Addendum #3.

Question 7: When presenting an assignment for consideration as an R 2.2 qualifying sector experience, under Description of roles in the assignment, are only Qs (b) and (d) to be answered? Qs (a) and (c) are limited to presenting experience on monitoring assignments.

Answer 7: Bidders have to present Assignments to demonstrate the experience required in each Mandatory and Rated Technical Criteria. For Mandatory Technical Criteria M3 and Rated Technical Criteria R 2.2 only, Bidders are allowed to present either Monitoring or Technical subject matter expertise Assignments. As examples:

Example 1:

- i) Assignment #1, #2, and #3 #4, #5, #6, #7, #8, and #9 could be presented to demonstrate:
- (a) *that the assignment constitutes sectoral experience providing Monitoring Services as requested per Mandatory Criteria M2 and Rated Technical Sub-Criterion R 2.1;*
 - (b) *that the assignment constitutes sectoral experience providing **Monitoring Services** in international development as requested per Mandatory Criteria M3 and Rated Technical Sub-Criterion R 2.2*
 - (c) *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.*
 - (d) *the Proposed Individual's experience with stakeholders in the context of this assignment as requested per Rated Technical Sub-criterion R 2.4.*

Example 2:

- ii) Assignment #1, #2, and #3 could be presented to demonstrate:
- (a) *that the assignment constitutes sectoral experience providing Monitoring Services as requested per Mandatory Criteria M2 and Rated Technical Sub-Criterion R 2.1;*
 - (c) *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.*
 - (d) *the Proposed Individual's experience with stakeholders in the context of this assignment as requested per Rated Technical Sub-criterion R 2.4*
- iii) Assignment #4, #5, #6, #7, #8, and #9 could be presented to demonstrate:
- (b) *that the assignment constitutes sectoral experience providing **technical subject matter expertise** in international development as requested per Mandatory Criteria M3 and Rated Technical Sub-Criterion R 2.2.*

Question 8: Does a Supply Arrangement under this 2016 RFSA monitoring is awarded as per SECTOR or sub-sector?

Answer 8: Supply Arrangement will be awarded at the Sector level, to successful bidders.

Question 9: If 'Days' (R 2.1 – 2.2 – 2.3) are used to award marks for 'sectorial experience' in monitoring, international development, in-country, how many days in the assignment experience is required to qualify as a monitor in a sub-sector category where a candidate seeks to qualify under more than one sub-sector?

Answer 9: Successful Bidders will be qualified at the level of the sector, which includes sub-sectors. Each assignment submitted to demonstrate the requirement of the Rated Technical Criteria R 2.1, R 2.2, and R 2.3 should describe the provision of such services as required by the criteria for at least one of the sub-sector of sector.

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Question 10: For candidates who qualified in the three previous sub-sectors in health (3-1: Health Systems Strengthening; 3-2: Health Information Systems Strengthening for Planning and Surveillance; 3-3: Maternal, Newborn and Child Health), do they need to apply again for the new 3.1 sub-sector, nutrition?

Answer 10: No.

Question 11: With the changes in sectors and subsectors between the first Monitoring RFSA and this one, are candidates who previously qualified automatically refreshed for the entire sector, regardless on which sub-sector they originally qualified for (assuming they fill out the required TECH-1, TECH-2 and TECH-3)?

Answer 11: Yes. Qualification in a particular sub-sector will be made through Solicitation Processes Within the Framework of the SA.

Question 12: Would it be correct to assume that the last word in the following is supposed to be "monitoring or technical services" rather than "evaluation"?

"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."

Answer 12: No. The word "evaluation" is properly used.

Question 13: Given that the individuals being proposed require significant experience in international development, a number of candidates are overseas/in remote areas and it is difficult to obtain a wet signature from them in time for submission. Will an electronic signature on the forms (eg. TECH-4C) be acceptable?

Answer 13: Yes.

Question 14: I am a SA holder for the sector x. What forms must I complete and sign to extend this SA?

Answer 14: See the RFSA, Section 1 (ii) "Instructions to SA holders", scenario 4 "Submission of Proposal to accept the amended terms and conditions of PART II Standard Form of the Supply Arrangement".

Question 15: I just mailed in my bidding file which should be reaching your office next Monday. I had to rush to meet the deadline which I thought was still September 20. But after mailing in the file, I discovered that there were several amendments involving, among others, the use of revised forms (4A, 4B1, 4B2, 4C). The problem is that in filling in the information for my file, I used the non-amended forms, the ones that were in the RFSA: I would like to know if I can submit new filled-out forms in replacement of the ones I already submitted.

Answer 15: See RFSA, Section 1: (i) Instructions to Bidders, paragraph 7.12.

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Question 16: For existing SA Holders is there a need to provide TECH 1, 2 and 3 in soft copies as well as the hard copies?

Answer 16: Yes, as the soft copy serves us to manage the Supply Arrangement files.

ALL OTHER TERMS AND CONDITIONS REMAIN UNCHANGED

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

CURRICULUM VITAE FOR PROPOSED INDIVIDUAL

Guidance to Bidders:

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:

Citizenship:

Location (city, country):

Sector and Sub-sector:

Languages

Language Proficiencies:	Language	Proficiency Ratings		
		Oral	Reading	Writing
<i>Description of Proficiency Ratings are available at http://www.international.gc.ca/ifait-iaeci/test_levels-niveaux.aspx?lang=eng</i>	English	[]	[]	[]
	French	[]	[]	[]
	Others (list any other languages)	[]	[]	[...]

Former Canadian Public Servant

Former Canadian Public Servant (FPS) Status:

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?

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 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, 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.</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
	Level of effort providing technical subject matter expertise: Indicate number of Days worked for the provision of technical subject matter expertise for Criteria M3 and R 2.2 only, if applicable
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
Description of the Proposed Individual's roles and responsibilities in the Assignment:	
<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

GUIDANCE TO BIDDERS

GENERAL INSTRUCTIONS (FOR ALL SECTORS):

Definitions:

For the purpose of this evaluation grid, the following definitions apply:

- (a) **“Assignment”**: 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, on the part of the Proposed Individual. An Assignment can be part of a full-time job.
- (b) **“At least”** or **“minimum”**: the minimal expectation for a requirement. No points will be given if the minimal expectation is not demonstrated.
- (c) **“Developing country”**: a country that is eligible for development assistance according to the Development Assistance Committee of the Organisation for Economic Co-operation and Development (OECD-DAC). Countries that are currently considered to be developing countries are listed in <https://www.oecd.org/dac/stats/documentupload/DAC%20List%20of%20ODA%20Recipients%202014%20final.pdf>. Countries that were formerly, but are not currently on the DAC list will be deemed to be developing countries if they were on the OECD-DAC list at the time the work was performed <http://www.oecd.org/dac/stats/historyofdaclistsofaidrecipientcountries.htm>. The onus is on the Bidder to identify when this situation applies to the cited experience.
- (d) **“International development”**: a mandate with the ultimate aim of reducing poverty and improving the well-being of people living in a developing country.
- (e) **“Monitoring Services”** is assessing and analysing the project/program information to judge and determine if it is on track and contributing to the outcomes as expected. It is the systematic and continuous collection, analysis and use of information to support effective decision-making in a project/program. Monitoring services also include making recommendations and proposing adjustments to the project/program based on this assessment.
- (f) **“Sector”**: a field described in paragraph 3.3 *Description of Sectors and Sub-Sector of Part I, Section 4: Generic Terms of Reference*. “Sectoral experience” refers to experience in the Sector for which the individual is proposed.
- (g) **“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.”

Use of Forms: For each Proposed Individual, Bidders should submit forms TECH-4A “Curriculum Vitae (CV) for Proposed Individual” and TECH-4B1 “Demonstration of Proposed Individual’s Monitoring Capabilities” and TECH-4B2 “Demonstration of Proposed Individual’s Technical Capabilities”. Forms TECH-4A, TECH-4B1 and TECH-4B2 should clearly identify the Sector for which an individual is proposed.

The information in form TECH-4A will be used to assess the mandatory technical criteria, as well as

Criterion 1 and Criterion 2 of the rated technical criteria.
 The information in TECH-4B1 will be used to assess Criterion 3 of the rated technical criteria.
 The information in TECH-4B2 will be used to assess Criterion 4 of the rated technical criteria.

Content of Proposals:

Where a criterion or sub-criterion specifies a number of days of experience, the days where the assignments overlap are counted once.

Where a criterion or sub-criterion specifies a number of days of experience, the maximum number of Days in a month to be demonstrated by the Bidder should not exceed 31 Days per month calculated on an average, otherwise the assignment will not be considered.

Where a criterion or sub-criterion specifies a timeframe (e.g. “within the last fifteen (15) years”), the RFSA Closing Date is the point of reference. Experience acquired before the specified timeframe will not be considered. Where an Assignment is on-going and partially completed, only the portion of work performed within the specified timeframe will be considered. The Bidder bears the onus to provide the level of efforts in Days performed within the timeframe.

Example: Assuming the RFSA Closing Date is June 15, 2016 and that the experience should be within the last 15 years (i.e. only the work done between June 15, 2001 and June 15, 2016 will be considered).

Scenario 1:

- Assignment started on January 1, 2001 and completed on November 31, 2001;
- The total level of effort for the Assignment was 100 Days; and
- 23 Days were performed after June 15, 2001 which is the point of reference.

In above scenario 1, the Bidder should clearly indicate **23 Days performed after June 15, 2001** in TECH-4A, TECH-4B1 and TECH-4B2. Should the Bidder omit to provide this information, the assignment will not be evaluated.

Scenario 2:

- Assignment started on March 1, 2015 and will be completed on November 31, 2016;
- The total level of effort for the Assignment was 50 Days; and
- 10 Days were performed up to June 15, 2016, which is the point of reference.

In above scenario 2, the Bidder should clearly indicate **10 Days performed up to June 15, 2016** in TECH-4A, TECH-4B1 and TECH-4B2. Should the Bidder omit to provide this information, the assignment will not be evaluated.

Bidders should provide a reference (name, title, telephone number and email address) for each experience or Assignment used to respond to a criterion or sub-criterion.

Criteria No.	Mandatory Technical Criteria	Compliance (Yes or No)
M1	<p><i>Education</i></p> <p>For All Sectors except for Infrastructure Sector The Bidder’s Proposed Individual must have at least a Bachelor’s degree from a recognised university</p> <p>For Infrastructure Sector The Bidder’s Proposed Individual must have at least a Bachelor’s</p>	

	degree from a recognised university in Engineering or Architecture.	
M2	<p><i>Monitoring sectoral experience</i></p> <p>Using form TECH-4A, the Bidder must provide Assignment(s) demonstrating that the Proposed Individual has:</p> <p>For All Sectors except for Extractives a minimum of 400 cumulative Days of sectoral experience providing Monitoring Services in the last fifteen (15) years.</p> <p>For Extractives Sector a minimum of 250 cumulative Days of sectoral experience providing Monitoring Services in the last fifteen (15) years.</p>	
M3	<p><i>Sectoral Experience providing Monitoring Services or technical subject matter expertise in International Development</i></p> <p>Using form TECH-4A, the Bidder must provide Assignment(s) demonstrating that the Proposed Individual has:</p> <p>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.</p> <p>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.”</p>	
Criteria No.	Rated Technical Criteria	Score
Criterion 1	Academic Qualifications	
	<p>Using form TECH-4A, the Bidder should demonstrate that the Proposed Individual has academic qualifications in a field related to the Sector.</p> <p>Scoring (up to 50 points): <i>Highest level of education achieved at a recognised university in a field related to the Sector (non-cumulative):</i></p> <ul style="list-style-type: none"> • Bachelor’s degree = 30 points; • Multiple Bachelor’s degrees = 40 points; • Master’s degree , or equivalent graduate degree = 45 points; • Ph.D = 50 points. 	/50
Total Points for Rated Technical Criterion 1		/50
Criterion 2	Sectoral Experience	
R 2.1	Sectoral Monitoring Services experience	
	Using form TECH-4A, the Bidder should provide the	/125

	<p>Assignment(s) demonstrating that the Proposed Individual has sectoral experience providing Monitoring Services in the last fifteen (15) years.</p> <p>For all Sectors except for Extractives Sector Scoring (up to 125 points):</p> <ul style="list-style-type: none"> • Over 400 cumulative Days, but less than 550 cumulative Days: 75 points; • 550 cumulative Days or more, but less than 700 cumulative Days: 100 points; and • 700 cumulative Days or more: 125 points. <p>For Extractives Sector Scoring (up to 125 points):</p> <ul style="list-style-type: none"> • Over 250 cumulative Days, but less than 400 cumulative Days: 75 points; • 400 cumulative Days or more, but less than 550 cumulative Days: 100 points; and • 550 cumulative Days or more: 125 points. 	
<p>R 2.2</p>	<p>Sectoral Experience providing Monitoring Services or technical subject matter expertise in International Development</p> <p>Using form TECH-4A, the Bidder should provide the Assignment(s) demonstrating that the Proposed Individual has sectoral experience providing Monitoring Services or technical subject matter expertise in International Development in the last fifteen (15) years.</p> <p>For all sectors except Extractives: Scoring (up to 60 points):</p> <ul style="list-style-type: none"> • 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. <p>For Extractives Sector: Scoring (up to 60 points):</p> <ul style="list-style-type: none"> • 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. 	<p>/60</p>
<p>R 2.3</p>	<p><i>In Developing Country Sectoral Monitoring Experience:</i></p> <p>Using form TECH-4A, the Bidder should provide the Assignment(s) demonstrating that the Proposed Individual has sectoral experience working in-country, in a developing country,</p>	<p>/60</p>

	<p>providing Monitoring Services in the last fifteen (15) years.</p> <p>For all Sectors Scoring (up to 60 points):</p> <ul style="list-style-type: none"> • At least 60 cumulative days, but less than 240 cumulative days: 36 points; • 240 cumulative days or more, but less than 480 cumulative days: 50 points; • 480 cumulative days or more: 60 points. 	
R2.4	<p><i>Sectoral Experience with Stakeholders:</i></p> <p>Using form TECH-4A, the Bidder should demonstrate the Proposed Individual’s experience with at least three (3) types of stakeholders in the context of sectoral Monitoring Services Assignments in the last fifteen (15) years.</p> <p>For the purpose of this sub-criterion, “experience with a stakeholder” means that the Proposed Individual:</p> <ul style="list-style-type: none"> • worked directly for the stakeholder as an employee OR • worked on an Assignment funded by the stakeholder; OR • had a direct working relationship with the stakeholder. <p>Simply identifying stakeholders without supporting information could result in a score of zero (0) for this sub-criterion.</p> <p>DFATD will consider the following types of stakeholders:</p> <ul style="list-style-type: none"> • Donor agencies (organizations that are part of a government that oversee or administer the financing of international development projects and programs); • Governmental organizations (organizations that are part of a government, other than donor agencies; at all levels, including inter-governmental organizations); • Multilateral development institutions (organizations formed between nations to work on issues that relate to all of the countries in the organization, such as the ones listed at http://www.international.gc.ca/development-developpement/partners-partenaires/key_partners-partenaires_cles/index.aspx?lang=eng); • Non-governmental organizations (organizations that are not part of a government, that operate not-for-profit, and that pursue social aims); and • Private sector firms (organizations that are not part of a government and operate for profit). <p>Scoring (up to 25 points):</p> <ul style="list-style-type: none"> • Experience with 1 types of stakeholders: 10 points; • Experience with 2 types of stakeholders: 18 points; and • Experience with 3 types of stakeholders: 25 points. 	/25
Total Points for Rated Technical Criterion 2		/270
Criterion 3	Demonstrated Monitoring Capabilities	

<p>R 3.1</p>	<p>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.</p> <p>For each Assignment, the Bidder should describe the methodology used by the Proposed Individual in carrying out the Monitoring Services based on the following six (6) elements:</p> <ul style="list-style-type: none"> i. work planning, information gathering strategy; ii. design and use of monitoring tools; iii. ensuring quality of deliverables; iv. integration of relevant cross-cutting themes (“cross-cutting themes” refers to advancing gender equality, increasing environmental sustainability and strengthening governance); v. stakeholder engagement; vi. applying lessons learned and integrating international best practices in an international development context. <p>* For Bidders who submit proposals for Governance, Gender Equality, and Environment Sectors, Bidders are required to demonstrate integration of the other two cross cutting themes only. For example, Bidders submitting bids for Governance are required to demonstrate the integration of environment and gender equality cross-cutting themes.</p> <p>Scoring:</p> <p>Points will be allocated based on the six elements listed above. For each elements, the Bidder will be allocated up to 10 points as follow:</p> <ul style="list-style-type: none"> • Inadequate description (i.e. no demonstration that the Proposed Individual carried out the element related to the type of activities): 0 points; • Basic description (i.e. minimal demonstration that the Proposed Individual carried out the element related to the type of activities): 6 points; • Good description (i.e. satisfactory demonstration that the Proposed Individual carried out the element related to the type of activities): 8 points; • Excellent description (i.e. strong demonstration that the Proposed Individual carried out the element related to the type of activities): 10 points. <p>Notes:</p> <p>If the Assignment does not align with the indicated type of activities, described in paragraph 3.2 of the Section 4 “Generic Terms of Reference” it will not be rated.</p> <p>If the Bidder submits more than two (2) Assignments, DFATD</p>	<p style="text-align: center;"><i>/60 per Assignment</i></p>
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	will only consider the first two (2) in the order of presentation.	
	Total points for Rated Technical Criterion 3	/120
	Total Points for Rated Technical Criteria 1 to 3 (Pass Mark 60% or 264 Points)	/440
Criterion 4	Demonstrated Technical Capabilities	
R 4.1	<p>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) :</p> <ol style="list-style-type: none"> 1. Strategic research, analysis and advice; 2. Feasibility and scoping studies ; 3. Project/program design and planning (including Results Based Management or equivalent); 4. Development of Tools/Guidelines, Training & Capacity Development; 5. Institutional performance assessment, reform and relationship building. <p>A) The Bidder should describe only one (1) type of activity of those listed above, per Assignment.</p> <p>B) For each Assignment, the Bidder should describe the methodology used by the Proposed Individual in carrying out the type of activity based on the following five (5) elements:</p> <ol style="list-style-type: none"> i. work planning, information gathering strategy; ii. ensuring quality of deliverables; iii. integration of relevant cross-cutting themes* (“cross-cutting themes” refers to ‘advancing gender equality’, ‘increasing environmental sustainability’ and ‘strengthening governance’); iv. stakeholder engagement; and v. applying lessons learned and integrating international best practices in an international development context. <p>* For Bidders who submit proposals for Governance, Gender Equality, and Environment Sector, Bidders are required to demonstrate integration of the other two cross cutting themes only. For example, Bidders submitting bids for Governance are required to demonstrate the integration of environment and gender equality</p>	/30 <i>per assignment</i>

	<p>cross-cutting themes.</p> <p>Scoring: Points will be allocated based on the five elements listed in B). For each element, the Bidder will be allocated up to 6 points as follow:</p> <ul style="list-style-type: none"> • Inadequate description (i.e. no demonstration that the Proposed Individual carried out the element related to the type of activities): 0 points; • Basic description (i.e. minimal demonstration that the Proposed Individual carried out the element related to the type of activities): 2 points; • Good description (i.e. satisfactory demonstration that the Proposed Individual carried out the element related to the type of activities): 4 points; • Excellent description (i.e. strong demonstration that the Proposed Individual carried out the element related to the type of activities): 6 points. <p>Notes:</p> <p>If the Assignment does not align with the indicated type of activities listed above, it will not be rated.</p> <p>If the same Assignment is presented for different types of activity, DFATD will only evaluate the first Assignment in the order of presentation.</p> <p>If more than one (1) type of activity is described per Assignment, DFATD will only consider the first type of activity in the order of presentation.</p> <p>If the Bidder submits more than two (2) Assignments, DFATD will only consider the first two (2) in the order of presentation.</p>	
Total Points for Rated Technical Criterion 4		/60
TOTAL POINTS FOR RATED TECHNICAL CRITERIA (Pass Mark 60% or 300 Points)		/500

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.