

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 5 "Evaluation Criteria", Mandatory Technical Criterion M2 "Monitoring sectoral experience", second paragraph:

DELETE the words: "a minimum of 400 Days".

INSERT the words: "a minimum of 300 Days"

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

DELETE the words: "over 400 cumulative Days".

INSERT the words: "over 300 cumulative Days".

B. QUESTIONS AND ANSWERS

Question 1: Neither "Sectoral Monitoring Services" nor "a minimum of 400 cumulative Days of sectoral experience providing Monitoring Services in the last fifteen (15) years" were requirements under the prior RFSA SEL#: 2013-CC1525-SA-MON00 (The Bidder should demonstrate that the proposed individual has at least 50 days, ideally 300 days or more as a monitor (using form TECH 4A) Cumulative, based on the entire CV), which this RFSA is a refresh for?

As existing SA Holders are not required to re-qualify technically for any of the existing Sectors for which they were issued an SA, how can this RFSA provide a fair competition, as new applicants are being held to a far higher technical standard than the incumbents?

Answer 1: One of the objectives of this SA refresh is to allow DFATD to incorporate lessons learned from the previous process to ensure that the department's requirements are adequately met, in accordance with item 4.2.2 of the General Information of the SA. Although the requirements evaluated under Criteria M2 and R2.1 of this RFSA differ slightly from the previous process, these requirements are more aligned with the department's requirements in terms of monitoring experience.

The 400 days requested under M2 and R 2.1 of this refresh was calculated using average level of efforts of contracts awarded under the existing SAs. However, in order to better align with the requirements of the previous RFSA, DFATD has decided to reduce the number of cumulative days of the level of effort to 300 days for all sectors, except for the Extractives sector.

Question 2: P.45 of the Section 5: "Evaluation Criteria", notes that "*Where a criterion or sub-criterion specifies a number of days of experience, the days where the assignments overlap are counted once*". Does this indicate that in a case where an assignment within the field of international development was formed of a combination of responsibilities, including those of monitoring, the full duration of the assignment could be used under TECH-4A to demonstrate the fulfilment of either M2 or M3 (or equally R 2.1 & R2.2), not both?

Answer 2: By « Where a criterion or sub-criterion specifies a number of days of experience, the days where the assignments overlap are counted once », we mean that two or more assignments cannot overlap in terms of days of work. A working day can only be assigned to one assignment at a time.

Addendum 4

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For assignment with a combination of responsibilities, M2 and R 2.1, only the days providing monitoring services will count. For M3 or equally R 2.2, only the days providing monitoring services and/or technical subject matter expertise in international development will count.

Question 3: We are an existing Supply Arrangement holder and we are planning to participate in this refresh to: a) Refresh ceiling rates for qualifying individuals under existing SA; b) Qualify additional individuals for new sectors/subsectors.

We noticed that the refresh Supply arrangement has more sectors and subsectors, and the title/numbering of them has changed from the original RFSA. In order for us to refresh the ceiling rates for qualifying individuals under existing SA, can DFATD please confirm the following new sectors/subsectors match the ones we are already qualified for.

Answer 3: DFATD confirms that the sub-sectors you are already qualified for match the sectors published in this RFSA Refresh.

Question 4: Within an assignment, are days associated to the different sub-sector (s) to be identified where more than one sub-sector is identified as qualifying for a supply arrangement found in the heading section of TECH 4A?

Answer 4: No, successful Bidders will be qualified at the sector level. However, assignments presented by Bidders should align with the sector and sub-sectors.

Question 5: The reference to “**or**” in Addendum #2 would indicate that each assignment can or will be assessed as either a monitoring project or technical subject matter expertise but not both.

Ref. Addendum #2

(i) *When the assignment comprises of the provision of Monitoring Services **or** technical subject matter expertise and other services*

(ii) *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.”*

(iii) *Criterion M3: “Sectoral Experience providing Monitoring Services **or** technical subject matter expertise in International Development”*

Are we to identify someplace the type of assignment (monitor or Tech subject matter expert) being presented?

Answer 5: Bidders should identify the type of assignment in TECH-4A, cell “Level of effort” providing Monitoring Services” or the cell “Level of effort of technical subject matter expertise”, whichever is applicable as amended in the Addendum #3 published at the address <https://buyandsell.gc.ca/procurement-data/tender-notice/PW-16-00743613>

Question 6: Can an assignment comprise of Monitoring Services and technical Subject matter expertise?

Answer 6: Yes. See Form TECH-4A “Curriculum Vitae for Proposed Individual” amended Note last paragraph as set out in Addendum #2 published at the address <https://buyandsell.gc.ca/procurement-data/tender-notice/PW-16-00743613>

Question 7: How would M2 and M3 days be presented and scored where the individual fulfilled many roles in multiyear integrated project

Answer 7: See Addendum #3, Answer 7, and see also Form TECH-4A "Curriculum Vitae for Proposed Individual" amended as set out in Addendum #3 published at the address <https://buyandsell.gc.ca/procurement-data/tender-notice/PW-16-00743613>

Question 8: Under scenario 3 – "Submission of Proposal to Refresh the Qualified Individuals Ceiling Fees under an existing SA": it is stated that "SA Holders are not required to re-qualify technically for any of the existing sectors for which they were issued an SA". It is in this case; to accept the amended terms and conditions of PART II Standard Form of Supply Arrangement by submitting Forms TECH-1, TECH-2 and TECH-3.

We would only confirm that the delivery of the TECH 4 (A, B1, B2 and C) is not necessary in these cases.

Answer 8: For Scenario 3 – "Submission of Proposal to Refresh the Qualified Individuals Ceiling Fees under an existing SA", SA Holders must follow the Section 1: (ii) "Instructions to SA Holders" set out in the RFSA to submit a proposal. The Addendum # 1, modification 1, specifies that paragraphs 9.5 to 9.7 of the RFSA Section 1 (i) are not applicable. DFATD confirms that the submission of TECH 4 (A, B1, B2 and C) are not required for Scenario 3.

Question 9: Will individuals submitted and qualified for a particular sector or sub-sector in the 2013/2014 competition now be considered qualified for the entire sector even where the numbering and/or title/definition has changed, e.g. sector 10 and sub-sector 2-3?

Answer 9: Yes. See Answer 11 of the Addendum #3 for more details.

Question 10: Will submission and qualification for a specific sub-sector in the 2013/2014 competition now automatically qualify the individual for all sub-sectors in the relevant sector or will a resubmission be required if the TECH-4 forms were very specifically targeted at particular sub-sector?

Answer 10: No, qualified individuals from the 2013/2014 competition process are qualified in their respective sub-sector(s) which they were qualified in 2013/2014. At the issuance of the Supply Arrangements DFATD will submit an update CV template for qualified individual's opportunity to update their Curriculum Vitae(s). Qualified individuals will indicate the sub-sector(s) and provide the description(s) in which they have experience, as stipulate in the RFSA PART II "Standard Form of Supply Arrangement", Section 1 "General Information", paragraph 5.1. DFATD will conduct solicitation processes in accordance with process set in paragraph 5.

Question 11: In Addendum 3 (Question 1) you have restated the 3-year duration for an eligible assignment. For many donor agencies a 3-year project in areas would be unusual, and a project requiring an extension to 3 years would be subject to cancellation. For example, we have undertaken major PFM reform projects for the Asian Development Bank, World Bank, EU and UNDP, and in none of these cases was the contracted project as long as 3-years, in most cases only 2 years or less. In all cases, however, the experience was highly valuable and potentially transferable, from both a provision of technical services and a monitoring point of view. Please consider a minimum project length of less than 3 years, to allow experience with a reasonable range of other donor projects/assignments to be considered.

Addendum 4

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Answer 11: The minimum period of three years is for monitoring assignments. For those of technical services, see the definition of "Technical Assignment."

Question 12: In Addendum 3, in the revised attachment "Section 5: Evaluation Criteria", the Definitions section makes a distinction between "Assignment", which is defined as "... a level of effort of at least twenty (20) Days per year for a three (3) year minimum duration", and "Technical Assignment", which is defined - in words added in Amendment 2 - as "... a level of effort of at least twenty (20) Days on the part of the Proposed Individual."

The distinction is reasonable and logical, and we have assumed that the latter applies where an assignment is cited in respect only of the provision of technical services. This would be the case in respect of M3, which makes provision (in distinction from M2) for the citing of sectoral experience in *either* monitoring services *or* technical subject matter expertise, and R 2.2 which also provides, (in distinction from R 2.1) for the use of sectoral experience in providing *either* monitoring services *or* technical subject matter experience. The same applies to Criterion R 4.1, which requires two distinct Sectoral Technical Assignments.

The distinction is important, as in many areas it would be highly unusual for an assignment in respect of providing only technical expertise to be for as long as 3 years, or even 2 years.

We would be grateful for your confirmation that our understanding is correct.

Answer 12: DFATD confirm that the "Technical Assignment" Definition of the Section 5 "Evaluation Criteria" of the RFSA, amended as set out in Addendum #2 applies where an assignment is cited in respect only of the provision of technical services.

Question 13: I sent my proposal by mail on September 30, 2016 to meet the closing deadline of October 11, 2016. Now that the closing deadline is changed, is this going to affect my proposal? Do I need to resubmit my proposal?

Answer 13: No.

Question 14: I am SA Holder and, as requested, I submitted an updated proposal for scenarios 3 and 4. I note that in the Addendum 3, of the current RFSA, it says:

"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"

My proposal was made only in hard copy. I would like to know if I have the obligation to provide an electronic copy of the forms TECH1, 2 and 3 as well as FIN- 1 and how should I do it?

Answer 14: See Section 1: i) "Instructions to Bidders", paragraph 7.12 of the RFSA.

C. ALL OTHER TERMS AND CONDITIONS REMAIN UNCHANGED