

Project Title: Strengthening Ethics and Integrity Project in South Africa

A. AMENDMENT TO THE REQUEST FOR PROPOSALS

1. *Section 1. Instructions to Bidders*, **DELETE** paragraph 4.3 and **REPLACE BY** the following: “This RFP is limited to Bidders who are Canadian individuals or entities as described in TECH-2: Certifications.”
2. *Section 1. Instructions to Bidders, Data Sheet*, **DELETE** text under *definitions (ff)* and **REPLACE BY** the following:
“The RFP Closing Date is 2017 August 18 at 14:00 hrs, Eastern Daylight Saving Time (EDT)”.
3. *Section 3. Financial Proposal – Standard Forms*, **DELETE** FORM FIN-1 and **REPLACE BY** the REVISED FORM FIN-1 found at the end of this addendum.
4. *Section 5. Evaluation Criteria*, Requirement 2: Approach to implementing the Project, **DELETE** the following text: “Page limitation: maximum 8 pages” and **REPLACE BY**: “Page limitation: maximum 12 pages”.
5. Amendment is only applicable to the French version of the RFP. See French addendum #2 for details.
6. *Section 5. Evaluation Criteria*, Requirement 6: Project Finance Officer, **DELETE** requirement 6.1 and **REPLACE BY** the following:

“6.1 Education and Professional Development (up to 20 points)

6.1.1 Education - The proposed individual should have at least a Bachelor’s degree, ideally a Master’s degree or higher in a relevant discipline and from a recognized establishment. A relevant discipline means: accounting, commerce, economics or business studies (up to 10 points).

- Bachelor degree in any discipline: 0 points
- Bachelor degree in a relevant discipline: 7 points
- Masters’ Degree or higher in any discipline: 8 points
- Master’s degree or higher in a relevant discipline: 10 points

6.1.2 Valid professional certification, accreditation or designation in accounting or finance issued by a professional body (5 points for one (1) relevant certification, accreditation or designation).

For the purpose of this criterion, “professional body” means an organization to which members of a profession are admitted and which enjoys certain prerogatives to control professional practices and to take disciplinary action.”

6.1.3 Professional Development - Points will also be awarded for professional development completed by the proposed individual in the past ten (10) years as of the RFP closing date (including additional degree or diploma from a recognized establishment, or professional training other than those recognized under 6.1.1 or 6.1.2, publications, research,) related to: project management, accounting, commerce, economics or business studies (1 point per Professional Development, up to 5 points).

7. *Section 5. Evaluation Criteria*, Requirement 6: Project Finance Officer, **DELETE** requirement 6.3 and **REPLACE BY** the following:

“6.3 Narrative (up to 25 points)

The Bidder should demonstrate in a short narrative description that the proposed individual has experience in each of the following areas (5 points per area, up to 25 points).

6.3.1 Overseeing procurement/purchasing activities of goods, services and equipment;



- 6.3.2 Administering and managing contracts for technical expertise;
 6.3.3 Developing budget control mechanisms;
 6.3.4 Monitoring financial aspects of a project;
 6.3.5 Participate in project financial audits.”

B. QUESTIONS AND ANSWERS

Question 1	<p>In reference to <i>Requirement 6: Project Finance Officer</i>, we note that points are awarded for Masters’ Degrees or higher. We are writing to confirm that the Canadian Chartered Professional Accountant (CPA) designation is considered at least equivalent to a Masters’ degree. According to CPA Canada’s website, “<i>CPA Professional Education Program (PEP) is a graduate-level program for CPA candidates that focuses primarily on enhancing the ability to apply professional knowledge, values, ethics and attitudes in a professional context.</i>” (https://www.cpacanada.ca/en/become-a-cpa/cpa-professional-education-program-becoming-a-cpa)</p> <p>Based on the information above, we understand that the Canadian CPA designation is equivalent to a Masters’ Degree. Please confirm that this is GAC’s understanding as well.</p>
Answer 1	<p>It is the bidder’s responsibility to demonstrate that the individual proposed meets the education requirements as described under <i>Requirement 6 and defined under Personnel category in Section 5. Evaluation Criteria</i>. The Department of Foreign Affairs, Trade and Development (DFATD) will not evaluate the proposed resource education at this time. The technical evaluation will be conducted in accordance with the RFP after the RFP Closing Date.</p> <p>Requirement 6 has been modified; please refer to items 5 and 6 of the Section A above.</p>
Question 2	<p><i>Referring to Data Sheet Section 9.8c and 11.19:</i> It is our understanding that the Project Director role is intended to be a home based position and therefore is not eligible for living allowances. However, could GAC please confirm that the proposed Project Director does not need to reside in Canada?</p>
Answer 2	<p>As per <i>Section 4-Terms of Reference, Annex B-Specific Mandate of the Consultant, paragraph 3.4.1 Project Director</i>: the project Director position will be based in Canada. DFATD does not specify the home location of the individual for this position.</p> <p>For the purpose of this RFP, overseas costs are only applicable to the position identified by DFATD in form FIN-1A, table “<i>Overseas costs for Personnel on long-term assignment</i>”.</p>
Question 3	<p>Do all of the advisors and specialists listed (i.e. Gender Equality Specialist, Financial Modelling Advisor, etc.) need to be locals (Africans) or can we send Canadian experts to Africa to cover these positions?</p>
Answer 3	<p>DFATD does not specify the nationality of the individuals proposed for the positions listed under form FIN-1A, table “<i>Cost of Personnel</i>”. But DFATD does encourage the use of local resources. As described under <i>Section 4-Terms of Reference, Annex B-Specific Mandate of the Consultant, paragraph 3.4 Provision of Professional Services</i>: “<i>(...) The Consultant is expected to make every effort to maximize the use of South African resources, where qualified and available.(...)</i>”.</p> <p>The work location for all personnel positions is listed in Data Sheet 9.8 (c) and 11.19.</p> <p>For the purpose of this RFP, overseas costs are only applicable to the position identified by DFATD in form FIN-1A, table “<i>Overseas costs for Personnel on long-term assignment</i>”.</p>
Question 4	<p>If the Finance Officer does not have a full year of in country experience, will they just lose the 5 points allocated to that experience or will they be disallowed (zero points for entire position).</p>

Answer 4	Requirement 6.2.3 is a rated requirement, not a mandatory requirement. Points will be awarded for the requirement only. As indicated under “ <i>Guidance for Bidders</i> ” under <i>Section 5. Evaluation Criteria</i> : “For the purpose of the Rated Evaluation Criteria, the following applies: The terms “at least” or “minimum” reflect the minimal expectation for a requirement. No points will be given if the expected minimum requirement is not demonstrated.”
Question 5	The Terms of Reference refer to “offices” in the plural (pg.56, 3.4.1 bullet 9; pg.61 “phase out plan”). Please clarify whether the consultant is expected to establish and manage its own office in Pretoria as well as an office for the EIDM-TAU, or if this is a reference to the consultant’s office(s) only.
Answer 5	It refers to the Consultant’s office only. The Consultant is not required to establish and manage an office for the Ethics, Integrity and Discipline Management Technical Assistance Unit (EIDM-TAU).
Question 6	With the extensive number of sub-headings and elements/considerations/ measures, etc. required in sections 2.1 and 2.2 and 2.3, we would like to request an increase of the number of pages for the Requirement 2 from 8 pages to 12 pages.
Answer 6	Requirement 2 has been modified. Please see Section A above, item 4.
Question 7	We would like to request a two week extension to the closing date.
Answer 7	Please refer to Section A above, item # 2.
Question 8	A Diploma of Business Management in South Africa is a three-year full-time program that has been recognized by USAID and the EU as a Bachelor’s equivalent. Will Global Affairs Canada recognize this as equivalent?
Answer 8	It is the bidder’s responsibility to demonstrate that the individual proposed meets the education requirements as described under <i>Requirement 6 and defined under Personnel category in Section 5. Evaluation Criteria</i> . The Department of Foreign Affairs, Trade and Development (DFATD) will not evaluate the proposed resource education at this time. The technical evaluation will be conducted in accordance with the RFP after the RFP Closing Date. Requirement 6 has been modified; please refer to items 5 and 6 of the Section A above.

Section 3. Financial Proposal - Standard Forms

FORM FIN-1 -REVISED

TOTAL COST

Guidance to Bidders:

The Bidder must quote its financial proposal in Canadian currency (CAD). All-inclusive firm daily Fees include salary, benefits (paid and time-off), overhead and profit, excluding Applicable Taxes. The Bidder is requested to show the amount of Applicable Taxes, separately.

FORM FIN-1A

COST OF PERSONNEL

Guidance to Bidders:

The Bidder must provide a firm all-inclusive daily Fee **for each year** for the positions of Personnel identified below only. The Bidder cannot add any other positions.

Personnel Resource Name	Personnel Position	Year 1 Firm all-inclusive daily Fees \$	Year 2 Firm all-inclusive daily Fees \$	Year 3 Firm all-inclusive daily Fees \$	Year 4 Firm all-inclusive daily Fees \$	Year 5 Firm all-inclusive daily Fees \$	(LOE) Fixed by DFAT D (Days)	Sub-Total Estimated Cost = Average of year 1 to 5 x Total LOE
Canada								
	Project Director						440	
	Finance Officer						440	
South Africa								
	Project Coordinator						1,100	
	Legal Advisor						130	
	Business Development Advisor						130	
	Organisational Development Advisor						130	
	Financial Modelling Advisor						130	
	Gender Equality Specialist						130	
	Results Based Management Specialist						130	

SUBTOTAL 1 (EXCLUSIVE OF ANY TAXES)

COSTS FOR PERSONNEL ON LONG-TERM ASSIGNMENT

Guidance to Bidders:

The Bidder must provide a firm all-inclusive monthly rate and a total cost for relocation (mobilization and demobilization) for the Personnel assigned to the project in the Recipient Country for 12 or more consecutive months identified by DFATD.

Monthly rate (housing, basic utilities, other expenses)								
Personnel Resource Name	Personnel Position	Firm all-inclusive monthly rate					Number of months	Sub-total Cost=average of year 1 to 5 x Total number of months
		Year 1	Year 2	Year 3	Year 4	Year 5		
	Project Coordinator						57	
SUBTOTAL-2 (exclusive of any taxes) - Total (housing, basic utilities, other expenses)								\$
Ceiling for the monthly rate								\$2,700

Cost of relocation				
Personnel Resource Name	Personnel Position	Mobilization (from home country to recipient country)	Demobilization (from recipient country to home country)	Sub-Total (mobilization + demobilization)
	Project Coordinator			
SUBTOTAL – 3 (exclusive of any taxes) – Total (Cost of relocation)				\$

TOTAL COST FOR FIN-1A= SUBTOTAL-1 + SUBTOTAL-2 + SUBTOTAL-3

FORM FIN-1B

ADMINISTRATIVE MARK-UP COST OF ADDITIONAL SUB-CONSULTANTS AND CONTRACTORS

Guidance to Bidders:

The Bidder must provide its administrative cost for the management of the Sub-consultants and Contractors determined during project implementation.

Administrative mark-up rate	_____ %
Evaluated administrative mark-up cost $\$690,000.00 \times \frac{\% \text{ of mark-up}}{(1 + \% \text{ of mark-up})}$	FIN-1B = \$ _____
BUDGET SET-ASIDE FOR OTHER PERSONNEL* AND CONTRACTORS	\$690,000.00 including the administrative mark-up.

For example, see the table below:

	Base for applying the Mark-up rate	SAMPLE Administrative mark-up rate proposed by the Consultant (%)	Fees Billed to DFATD
Sub-consultants assigned to the project	Fees billed by the Sub-consultant	3%	Fees billed to Consultant by the Sub-consultant multiplied by 1.03
Contractors	Costs billed by the Contractor	3%	Costs billed to Consultant by the Contractor multiplied by 1.03

TOTAL OF THE FINANCIAL PROPOSAL = FIN-1A + FIN-1B

*When an employee is added during the contract, Consultant’s employees proposed rate will be reimbursed at actual direct salaries plus a mark-up rate that does not exceed the mark-up rate embedded in the all-inclusive firm rates submitted for the Personnel as part of the proposal. DFATD reserves the right to verify the mark-up charged on the employees added during the contract.

For example, see the table below:

	Base for applying the Mark-up rate	SAMPLE Administrative mark-up rate proposed by the Consultant (%)	Fees Billed to DFATD
Sub-consultant assigned to the project	Fees billed by the Sub-consultant	3%	Fees billed to Consultant by the Sub-consultant multiplied by 1.03
Contractors	Costs billed by the Contractor	3%	Costs billed to Consultant by the Contractor multiplied by 1.03
Employees of the Consultant			Fees proposed include a mark-up rate not exceeding the mark-up rate embedded in the all-inclusive firm fees submitted for the Personnel.

C. ALL OTHER TERMS AND CONDITIONS REMAIN UNCHANGED.