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| <p>RETURN BIDS TO : RETOURNER LES SOUMISSIONS À :</p> <p>Bid Receiving / Réception des soumissions</p> <p>Email / Courriel : urp-bru@international.gc.ca</p> <p style="text-align: center;">AMENDMENT #1</p> <p style="text-align: center;">REQUEST FOR PROPOSAL</p> <p>Proposal to: Department of Foreign Affairs Trade and Development.</p> <p>We hereby offer to sell to Her Majesty the Queen in right of Canada, in accordance with the terms and conditions set out herein, referred to herein or attached hereto, the goods, services, and construction listed herein and on any attached sheets at the price(s) set out thereof.</p> <p>Proposition aux : Ministère des Affaires étrangères, commerce et développement</p> <p>Nous offrons par la présente de vendre à Sa Majesté la Reine du chef du Canada, aux conditions énoncées ou incluses par référence dans la présente et aux annexes ci-jointes, les biens, services et construction énumérés ici sur toutes feuilles ci-annexées, au(x) prix indiqué(s).</p> <p>Comments - Commentaires</p> <p>Issuing Office – Bureau de distribution Foreign Affairs, Trade and Development SPBC / Affaires étrangères, commerce et développement, SPBC 200 Promenade du Portage, Gatineau, QC</p> | <p>Title / Titre Fund Management Services for the "Outcome Fund for Education Results" (OFFER) Project in Colombia.</p> | <p>October 5, 2022</p> | |
| | <p>Solicitation No. / N° de l'invitation 2022-P-002843-7440102</p> | | |
| | <p>Client Reference No. / No. de référence du client(e) 2022-P-002843-7440102</p> | | |
| | <p>Solicitation Closes / L'invitation prend fin At / à : 2:00 PM EDT (Eastern Daylight Time) On / le : October 20, 2022</p> | | |
| | <p>F.O.B. / F.A.B. Plant-Usine: <input type="checkbox"/> Destination: <input checked="" type="checkbox"/> Other-Autre: <input type="checkbox"/></p> | | |
| | <p>Destination of Goods and Services / Destinations des biens et services Department of Foreign Affairs, Trade and Development (DFATD)/ Ministère des Affaires étrangères, commerce et développement (MAECD)</p> | | |
| | <p>Address Inquiries to : Adresser toute demande de renseignements à : Isabelle Doray Contracting Authority Email / Courriel: Isabelle.doray@international.gc.ca</p> | | |
| | <p>Delivery Required / Livraison exigée</p> | <p>Delivery Offered / Livraison proposée</p> | |
| | <p>Vendor Name, Address and Representative / Nom du vendeur, adresse et représentant du fournisseur/de l'entrepreneur</p> | | |
| | <p>Telephone No. / No. de téléphone</p> | | |
| <p>Name and title of person authorized to sign on behalf of Vendor (type or print) / Nom et titre de la personne autorisée à signer au nom du fournisseur (taper ou écrire en caractères d'imprimerie)</p> | | | |
| <p>Signature</p> | | <p>Date</p> | |



REQUEST FOR PROPOSAL AMENDMENT #1

This Request for proposal amendment #1 has been raised to:

- (A) Respond to questions regarding the Request for Proposal (RFP)
- (B) Identify changes to the RFP

(A) QUESTIONS AND ANSWERS

Question 1:

On Pages 30-31 sub-sections 5.1.1, 5.1.2 and 5.1.3, the first line of each section states “Based full time in Colombia...” However, on page 75, section MTC2, it states “At least 50% of the proposed resources MUST be based in Colombia.”

Can you please confirm if the Proposed Team should be fully based in Colombia, or only 50%?

Answer 1:

The OFFER Director (5.1.1) and OFFER Lead Challenge Manager (5.1.2) MUST be based in Colombia, but other OFFER team members (5.1.3) could be based elsewhere. It is up to the bidder’s discretion to determine what 50% of other OFFER team members (5.1.3) would be based in Colombia. An amendment to the RFP will be posted to amend pages 30 and 31 to reflect the above answer.

Question 2:

On page 77, RTC1, section b), it states ‘Projects in which one or more of the key stakeholders includes the private sector.’

Will any other points be awarded for working with any other stakeholders, such as local education Non-governmental organizations or school boards?

Answer 2:

As indicated on page 78, Private sector includes private firm or business and Public sector includes local, provincial or federal government, government service or agency, Crown Corporation or a government funded establishment such as school (including universities) or hospital.

Question 3:

On page 79, section RTC2, Experience in Results-based Financing programming, the points awarded section states the following:

- d. Demonstrated *3 to less than 5 years* of experience working on Results-based Financing initiatives – 1 point by project up to a maximum of 3 points
- e. Demonstrated *5 to less than 7 years* of experience working on Results-based Financing initiatives – 1 point by project up to a maximum of 3 points



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- f. Demonstrated 7 years of experience working on Results-based Financing initiatives – 1 point by project up to a maximum of 3 points”

Following this criteria, it is not possible to gain full points for these questions as only 3 projects can be used for RTC2. Which means that it is only possible to gain 3 of the possible 9 points and the project length is irrelevant because you gain 1 point per project in either d, e, or f. Can you please:

- a) Review this scoring criteria and make adjustments to better reflect that only 3 projects are permitted for this section?
- b) Or, change it to the following:
- d) Demonstrated of experience working on Results-based Financing initiatives (points will be given per project, up to a maximum of 3 projects)
- > 3 years to < 5 years = 1 point
- ≥ 5 years to < 7 years = 2 points
- ≥ 7 years = 3 points
- Removing e) and f) but keeping g).

Answer 3:

DFATD agrees. An amendment to the RFP to reflect the suggested break down of points as per the below:

- d) Demonstrated of experience working on Results-based Financing initiatives (**a maximum of 3 points per project**)
- > 3 years to < 5 years = 1 point
- ≥ 5 years to < 7 years = 2 points
- ≥ 7 years = 3 points
-

Question 4:

On page 85, RTC10, it states, “the Bidder should demonstrate that at least one (1) proposed resource has expertise in Gender Equality strategy development.”

The RTC10 section falls under the Category 2, which looks at the Bidder’s experience and not the team experience, which is Category 1.

- a) Can you please confirm if RTC10 should be moved to Category 1, which looks at the team experience?
- b) If the RTC10 section is to stay in Category 2, this would mean that the demonstrated experience would need to fall under “the two completed projects that demonstrate experience in designed...” listed at the top of page 81. As such, can you please confirm:
- i. Does the demonstrated experience for RTC10 have to be from one of the two completed projects by the bidder, as listed on the top of page 81?
- ii. If so, this would require that the Director/Lead Challenge Manager had to be have been on the previous projects and/or a current employee, is this correct? Or, if the demonstrated experience for RTC10 has to come from the two completed projects, can the experience be internal to the Bidder, and not from one of the two proposed resources for this project?

Answer 4:

Note that Category 1 is the Bidder’s Experience, Category 2 is Qualification Delivering Project Methodologies and Category 3 is Proposed Team.



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- a) RTC10 will be moved under Category 1 – Bidder’s Experience. An amendment to the RFP will be done to reflect the change for which the bidder should demonstrate experience in Gender Equality Strategy.
- b) i) RTC10 will be moved to Category 1 – Bidder’s Experience.
- b) ii) RCT10 will be moved to Category 1 – Bidder’s Experience.
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Question 5:

On page 86, section RTC11.2.b), OFFER Director’s experience, can you please clarify what is meant by “initiative”? Should this include projects, contracts, agreements, or arrangements, as listed on page 78 under RTC1? Particularly as the left hand side states that only projects of 12 months or longer will be evaluated.

Answer 5:

The provided project(s) should demonstrate that the proposed OFFER Director has experience leading “Initiatives” which means the proposed OFFER Director is capable of performing the following:

- Ensuring overall quality and management oversight of all activities of the project;
- Leading the development of and approving all key project documents;
- Developing and maintaining networks of key stakeholders (government, civil society, other donors, private sector);
- Ensuring the effective management and internal monitoring of project progress and results, including with dealing with project issues and problems as they arise.

The above are to be demonstrated within the provided project(s) with a duration of at least twelve (12) months (1 year) will be considered for evaluation.

Question 6:

On page 87, RTC11.1.c), Can you please confirm that each of the 5 sub-points are worth a maximum of 2 points each? Or are some of them worth more? It is unclear as there is no point’s breakdown.

Answer 6:

As indicated in RTC 11.1 c) - c) Other training in the disciplines of project management, innovative finance, results-based payment programming, gender equality – 2 points per completed certificate up to a maximum of 10 points

Therefore, 2 points for each completed certificate (maximum of 5 completed certificate) up to a maximum of 10 points. (5 completed certificate X 2 points each = 10 points)

Question 7:

On page 88, section RTC.12.2.d), can you please confirm what Latam countries are applicable?

Answer 7:

Latam are Central America and the Caribbean countries and South America countries.



Question 8:

RTC2 - What's the difference, if the Fund Management Teams has 10 years of experience demonstrated in the 3 provided projects, working on Results –based Financing initiatives would we receive 3 points for d), 3 points for e) and 3 points for f)?

Answer 8:

DFATD agrees. An amendment to the RFP to reflect the change to requirement RTC2 will be done, as per the below:

d) Demonstrated of experience working on Results-based Financing initiatives (points will be given per project, up to a maximum of 3 projects)

> 3 years to < 5 years = 1 point

≥ 5 years to < 7 years = 2 points

≥ 7 years = 3 points

(B) CHANGES TO THE RFP

This amendment #1 to RFP 2022-P-002843-7440102 - Fund Management Services for the "Outcome Fund for Education Results" (OFFER) Project in Colombia, is raised to amend Annex "A" – Statement of Work, sub-section 5.1 Team Members – Tasks and Annex "D-3" – Point Rated Technical Criteria.

1. Annex "A" Statement of Work, sub-section 5.1 Team Members - Tasks

DELETE

sub-section 5.1 Team Members – Tasks of Annex "A" Statement of work in its entirety and

REPLACE WITH:

5.1. Team Members - Tasks

1. OFFER Director include, but are not limited to the following:

The **OFFER DIRECTOR MUST** be based full time in Colombia, the **OFFER Director** provides senior-level managerial services and advice on the OFFER projects and functions to the Alliance members, including the Development Section at the Embassy of Canada in Bogota and private sector partners, OFFER personnel, and other key stakeholders.

- Ensuring the overall quality and management of the OFFER Team and activities, and ensuring these services meet DFATD expectations and needs;
- Providing strategic direction and act as the primary point of contact of the Board and Governance Committees;
- Leading the process and strategy to develop and maintain national and local networks;
- Representing and advocating for the OFFER with key stakeholders, including for fundraising;
- Leading the preparation of all key OFFER documents, including procurement plans as part of the Project Implementation Plan (PIP), Annual Work Plan (AWP) and OPM (Operating Procedures Manual), as well



as overseeing the OPM as it relates to implementing of OFFER results-based payment challenges and the OFFER selected projects;

- Overseeing the development of OFFER strategies including Learning and Knowledge Sharing Strategy, Advocacy Plan, Technical Assistance Plan, Resource Mobilization Plan.
- Reviewing and approving the budgets and financial reports of OFFER and OFFER selected projects;
- Leading, planning and coordinating of all Results-based payment challenges;
- Maintaining an overview of project progress, adjusting as needed and communicating issues as they arise to the OFFER Executive Committee;
- Regularly communicating with the OFFER Alliance members, including the Development Section at the Embassy of Canada in Bogota, and the OFFER private sector partners, government authorities at the Ministry of Education and local Secretaries of Education, and other relevant project stakeholders;
- Planning and coordinating procurement plan of goods and services, including the procurement of verification agent(s), learning partner, financial manager and other team members and technical specialists as required;
- Leading and ensuring good risk management of establishing and proper management of the OFFER trust fund;
- Coordinating and supporting OFFER selected projects, as required:
 - Supervising the management and quality of narrative and financial reporting;
 - Ensuring the effective management and internal monitoring of project progress and results, including dealing with project issues and problems as they arise;
 - Providing other related services, as required.

2. OFFER Lead Challenge Manager include, but are not limited to the following:

The **OFFER LEAD CHALLENGE MANAGER MUST** be based full time in Colombia and under the general supervision of the OFFER Director, the **OFFER Lead Challenge Manager** will be tasked with leading the design, development, and implementation of the Results-based Payment Challenges, including monitoring and evaluation processes.

- Leading the challenge design and definition of critical parameters;
- Leading selection and procurement process of projects, under each challenge and oversee the resulting contracts;
- Working collaboratively with verification agents, Learning Partner and other technical specialists as required;
- Acting as the main point of contact with service providers, social financiers and performance managers;
- Resolving disputes and other potential contentious issues, as appropriate;
- Supervising the Performance Analyst team or similar.

3. Other OFFER team members

50% of the **OTHER OFFER TEAM MEMBERS MUST** be based in Colombia. The other OFFER team members can be based elsewhere. It will be at the discretion of the Contractor to determine what 50% of the Other OFFER team members would be based in Columbia. The other OFFER team members will be under general supervision of the OFFER Director or the OFFER Lead Challenge Manager, the tasks for the other OFFER team members include, but are not limited to the following:

A. Financial Management Tasks:



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- Legally establishing and administration of a trust fund for the OFFER
 - Financial management and reporting;
 - Administration of OFFER outcome payments, invoices etc.;
 - Support to OFFER Alliance members resource mobilization efforts (e.g., preparing financial portfolio, potential returns assessment etc.);
 - Budgeting and forecasting activities;
 - Executive Board financial reporting;
 - Leading other financial or administrative activities.

B. Performance Monitoring and Analysis tasks:

- Collecting and analyzing relevant information and data for the challenges design;
- Supporting the Lead Challenge Manager in the selection, procurement, and implementation of projects under each challenge;
- Gathering and analyzing performance data from each project implemented, and contributing to outcomes data and the assessment of the cost of outcomes;
- Reviewing outcome reports from the Verification Agent;
- Monitoring regularly projects for overall performance;
- Reporting to the Challenge Committee.

C. Learning and Evaluation Tasks

- Reporting to the Systems Learning Committee;
- Collaborating with Challenge Managers, Learning Partner and the Verification Agent to consolidate learnings and evidence from the Challenges;
- Leading and executing the learning agenda and its dissemination to relevant stakeholders to strengthen the education ecosystem and market;
- Providing relevant technical assistance to learning stakeholders within OFFER.

D. Advocacy and Policy Tasks

- Leading the communications and public advocacy strategy for the OFFER;
- Researching and analyzing public policy;
- Developing and disseminating materials based on evidence built under the challenges;
- Advising the Technical Committee on Public Relations matters.

E. Gender Equality Analysis Tasks

- Carrying out gender-based and intersectional analyses to inform the design, development and implementation of Results-based payment Challenges;
- Supporting the gender-analysis capacity building of OFFER selected projects;
- Developing and implementing a Gender Equality Strategy for the OFFER.



2. Annex “D-3” – Point Rated Technical Criteria

DELETE:

Annex “D-3” – Point Rated Technical Criteria in its entirety and

REPLACE WITH:

ANNEX "D-3" – POINT RATED TECHNICAL CRITERIA here under

4.1.1.3 Point Rated Technical Criteria (RTC)

| POINT RATED TECHNICAL CRITERIA | | | |
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| <p>The following considerations apply to the Bidder’s Experience section:</p> <p>Where the proposed Projects described have been carried out by a consortium or joint venture, the Bidder should clearly specify which of the members of that consortium or joint venture were responsible for the management and implementation of the Projects cited as examples.</p> <p>Where the Bidder is required to demonstrate experience, the following information should be included for each Project referenced in the narrative:</p> <ul style="list-style-type: none"> • Project duration (including start and end dates), • Project value, • Recipient country(ies) or Beneficiary, • Key Stakeholders, • Client, • Brief Project description, and • If a Project is referenced without all of this information, it will not be considered for the evaluation and no points will be awarded for the Project. <p>Definition:</p> <p>Private sector: Includes private firm or business.</p> <p>Public sector: Includes local, provincial or federal government, government service or agency, Crown Corporation or a government funded establishment such as school (including universities) or hospital.</p> | | | |
| Category 1: Bidder’s Experience | | | |
| RTC1 | Experience managing and implementing projects of size, scope and complexity to the OFFER | | |
| | <p>The Bidder should submit a maximum of three (3) projects, demonstrating the Fund Management Team’s experience in managing and implementing projects similar to the Outcome Fund for Education Results (OFFER), in terms of its results-based-payment mechanism.</p> <p>For the purpose of this requirement, the term “project” is defined as:</p> <ul style="list-style-type: none"> - a contract or - an agreement or | <p>Points will be awarded for each of the following Project experience:</p> <p>a) Projects submit in the sector of education at any level below post-secondary 1 point by project up to a maximum of 3 points</p> <p>b) Projects in which one or more of the key stakeholders includes the private sector 1 point by project up to a maximum of 3 points</p> | /15 |



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| | <ul style="list-style-type: none"> - an arrangement signed by the Bidder individually or in a consortium to provide the services. <p>Each project should describe the Fund Management Team's experience:</p> <ul style="list-style-type: none"> ➤ demonstrate the experience managing and implementing of the project; ➤ have started on or after January 1st, 2011; ➤ include at least two (2) types of the following elements: <ul style="list-style-type: none"> - blended finance approaches; - international development objectives, including SDGs; - building networks and relationships with multiple types of stakeholders to accomplish expected outcomes of a project. ➤ have an overall project value of at least \$2M CAD. | <ul style="list-style-type: none"> c) Implementing projects which benefit any of the following populations: indigenous communities, migrants, refugees, women and girls, internally displaced population and Afro-Latino communities 1 point by project up to a maximum of 3 points d) Developing or implementing gender-sensitive policies, or strategies 1 point by project up to a maximum of 3 points e) Working on Projects in Latin America and the Caribbean 1 point by project up to a maximum of 3 points | |
| RTC2 | Experience in Results-based Financing programming | | |
| | <p>The Bidder should submit a maximum of three (3) projects demonstrating the Fund Management Team's experience in developing or managing a Results-based Financing (RBF) project.</p> <p>For the purpose of this requirement, the term "project" is defined as:</p> <ul style="list-style-type: none"> - a contract or - an agreement or - an arrangement signed by the Bidder individually or in a consortium to provide the services. <p>Each project describing, the Fund Management Team's experience should:</p> <ul style="list-style-type: none"> ➤ have started on or after January 1st, 2011, AND ➤ be at least one (1) year in duration; AND ➤ Involve results-based financing mechanism or elements. | <p>Points will be awarded for each of the following Project experience:</p> <ul style="list-style-type: none"> a) Experience working on RBF in relation to the education sector, at any level - 1 point by project up to a maximum of 3 points b) Development and implementation of strategy for monitoring and evaluating RBF projects – 1 point by project up to a maximum of 3 points c) Development and implementation of a gender-equality strategy for RBF project – 1 point by project up to a maximum of 3 points d) Demonstrated experience working on Results-based Financing initiatives (Maximum of 3 points per project) <ul style="list-style-type: none"> > 3 years to < 5 years = 1 point ≥ 5 years to < 7 years = 2 points ≥ 7 years = 3 points e) 1 additional point by project up to a maximum of 3 points will be awarded if the demonstrated experience working on Results-based Financing initiatives was implemented in Latin America or the Caribbean | /21 |



| RTC3 | Experience in Blended Finance | | |
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| | <p>The Bidder should submit a maximum of three (3) projects demonstrating the Fund Management Team’s experience in developing or managing a project employing Blended Finance.</p> <p>Blended Finance is defined as the strategic use of development finance for the mobilization of additional finance towards sustainable development in developing countries.</p> <p>For the purpose of this requirement, the term “project” is defined as:</p> <ul style="list-style-type: none"> - a contract or - an agreement or - an arrangement signed by the Bidder individually or in a consortium to provide the services. <p>Each project describing, the Fund Management Team’s experience should:</p> <ul style="list-style-type: none"> ➤ have started on or after January 1st, 2011, AND ➤ be at least one (1) year in duration; AND ➤ Involve blended finance mechanism or elements. | <p>Points will be awarded for each of the following Project experience:</p> <p>a) Experience developing or managing Blended Finance elements in an international development project - 1 point by project up to a maximum of 3 points</p> <p>b) Experience contracting with multiple stakeholders from both public and private sector within a Blended Finance project - 1 point by project up to a maximum of 3 points</p> <p>c) Experience working on Blended Finance projects with four (4) or more co-financiers - 1 point by project up to a maximum of 3 points</p> <p>d) Experience working on Blended Finance projects with budgets of \$20M CDN or more - 1 point by project up to a maximum of 3 points</p> <p>e) Experience working on Blended Finance initiatives (points will be given per project, up to a maximum of 3 projects)</p> <p style="padding-left: 20px;">> 3 years to < 5 years = 1 point ≥ 5 years to < 7 years = 5 points ≥ 7 years = 10 points</p> <p>f) 1 additional points by project up to a maximum of 3 points will be awarded if the experience demonstrated was implemented in Latin America and the Caribbean.</p> | /45 |
| RTC4 | Gender Equality Strategy | | |
| | <p>The Bidder should submit a maximum of two (2) projects demonstrating experience in Gender Equality Strategy.</p> <p>The presented projects should at least demonstrate, the following elements:</p> <p>Note: the bidder may present these elements in any order using <u>both projects</u> i.e. each project does not need to cover all elements:</p> | <p>Points will be awarded for each of the four (4) elements demonstrated:</p> <p>The elements should demonstrate the approach and explain the relevant experience of the proposed resource in delivered project(s) /initiative(s) of these categories:</p> <p>a. Employing gender-based analysis throughout the design and operation of the Fund elements - 2 points per element up to a maximum of 8 points</p> | /40 |



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| | <p><u>ELEMENTS</u></p> <ol style="list-style-type: none"> 1. Description of the situation or context. 2. Description of the steps or actions that were taken 3. Description of the results that were achieved, including innovations and/or lessons learned. 4. Comments on challenges or problems that arose while organizing and conducting the project, and risk mitigation measures. | <ol style="list-style-type: none"> b. Ensuring data is disaggregated by gender and other key identity factors - 2 points per element up to a maximum of 8 points c. Ensuring Fund operations integrate Gender Equality, including assessment criteria for project selection, technical assistance for service providers, and the use of payment schemes to incentivize approaches to address specific gender equality gaps in education - 2 points per element up to a maximum of 8 points d. Engagement with women, girls and other vulnerable populations to ensure perspectives are integral to gender-based analyses - 2 points per element up to a maximum of 8 points e. Provision of Gender Equality expertise - 2 points per element up to a maximum of 8 points | |
| <p>Sub-total – Bidder’s experience Passing Mark 60% = 73 points</p> | | | <p>/121</p> |

Category 2: Qualification Delivering Project Methodologies

The Bidder should present up to two (2) completed projects that demonstrate experience in designing a detailed approach and methodology, and how it took into account the complexity and scope.

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| <p>RTC5</p> | <p>Component I: Fund Financial Management</p> | | |
| | <p>The Bidder should demonstrate experience-setting methodology in Fund Financial Management.</p> <p>The presented methodology completed should at least demonstrate, the following elements:</p> <p>Note: the bidder may present these elements in any order using <u>both projects</u> i.e. each project does not need to cover all elements:</p> <p><u>ELEMENTS</u></p> <ol style="list-style-type: none"> 1. Description of the situation or context. 2. Description of the steps or actions that were taken | <p>Points will be awarded for each of the four (4) elements demonstrated:</p> <ol style="list-style-type: none"> a. Setting up a Trust Fund including identifying the financial institution and gathering information and data assessment – 2 points per element up to a maximum of 8 points b. Managing financial risk – 2 points per element up to a maximum of 8 points c. Applying key national and international standards – 2 points per element up to a maximum of 8 points d. Reporting and engagement with Fund Governance Structure – 2 points per element up to a maximum of 8 points | <p>/32</p> |



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| | <p>3. Description of the results that were achieved, including innovations and/or lessons learned.</p> <p>4. Comments on challenges or problems that arose while organizing and conducting the project, and risk mitigation measures.</p> | | |
| RTC6 | Component II-A: Results-based Payment Challenge Design and Development | | |
| | <p>The Bidder should demonstrate experience in Results-based Payment Challenge Design and Development.</p> <p>The presented methodology completed should at least demonstrate, the following elements:</p> <p>Note: the bidder may present these elements in any order using <u>both projects</u> i.e. each project does not need to cover all elements:</p> <p>ELEMENTS</p> <ol style="list-style-type: none"> 1. Description of the situation or context. 2. Description of the steps or actions that were taken 3. Description of the results that were achieved, including innovations and/or lessons learned. 4. Comments on challenges or problems that arose while organizing and conducting the project, and risk mitigation measures. | <p>Points will be awarded for each of the four (4) elements demonstrated:</p> <ol style="list-style-type: none"> a. Defining the Results-based Payment Challenge – 2 points per element up to a maximum of 8 points b. Defining the Technical Details of the Challenge – Technical Assistance – 2 points per element up to a maximum of 8 points c. Identifying the Source of Funds and Contract Mechanism – 2 points per element up to a maximum of 8 points; d. Defining Eligibility and Minimum Service Requirements – 2 points per element up to a maximum of 8 points e. Defining the Metrics – 2 points per element up to a maximum of 8 points f. Identifying the Payment Schedule – 2 points per element up to a maximum of 8 points g. Defining the Verification Mechanism – 2 points per element up to a maximum of 8 points h. Coordinating Request for Proposals – 2 points per element up to a maximum of 8 points | /64 |
| RTC7 | Component II-B: Results-based Payment Challenge Implementation | | |
| | <p>The Bidder should demonstrate experience-setting methodology in Results-based Payment Challenge implementation.</p> <p>The presented methodology completed should at least demonstrate, the following elements:</p> <p>Note: the bidder may present these elements in any order using <u>both projects</u> i.e. each project does not need to cover all elements:</p> | <p>Points will be awarded for each of the four (4) elements demonstrated:</p> <ol style="list-style-type: none"> a. Evaluate and Select Proposals – 2 points per element up to a maximum of 8 points b. Contract the Selected Initiatives – 2 points per element up to a maximum of 8 points c. Support to Project Mobilization and Operation – 2 points per element up to a maximum of 8 points d. Pay for the Results that are achieved – 2 points per element up to a maximum of 8 points | /32 |



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| | <p><u>ELEMENTS</u></p> <ol style="list-style-type: none"> 1. Description of the situation or context. 2. Description of the steps or actions that were taken 3. Description of the results that were achieved, including innovations and/or lessons learned. 4. Comments on challenges or problems that arose while organizing and conducting the project, and risk mitigation measures. | <ol style="list-style-type: none"> e. Support to Project Mobilization and Operation – 2 points per element up to a maximum of 8 points f. Pay for the Results that are achieved – 2 points per element up to a maximum of 8 points | |
| RTC8 | Component III: Procurement of Independent Verification Agent | | |
| | <p>The Bidder should demonstrate experience-setting methodology in Procurement of Independent Verification Agent.</p> <p>The presented methodology completed should at least demonstrate, the following elements:</p> <p>Note: the bidder may present these elements in any order using <u>both projects</u> i.e. each project does not need to cover all elements:</p> <p><u>ELEMENTS</u></p> <ol style="list-style-type: none"> 1. Description of the situation or context. 2. Description of the steps or actions that were taken 3. Description of the results that were achieved, including innovations and/or lessons learned. 4. Comments on challenges or problems that arose while organizing and conducting the project, and risk mitigation measures. | <p>Points will be awarded for each of the four (4) elements demonstrated:</p> <ol style="list-style-type: none"> a. Designing the Verification Mechanism – 2 points per element up to a maximum of 8 points b. Procuring and contracting of an Independent Verification Agent, including ensuring independence of verification agent – 2 points per element up to a maximum of 8 points c. Data Collection and Knowledge Sharing – 2 points per element up to a maximum of 8 points d. Integration of gender equality considerations – 2 points per element up to a maximum of 8 points | /32 |
| RTC9 | Component IV: Complementary Strategies and Learning Agenda | | |
| | <p>The Bidder should demonstrate experience-setting methodology in</p> | <p>Points will be awarded for each of the four (4) elements demonstrated:</p> <ol style="list-style-type: none"> a. Detailing the Learning Agenda – 2 points per element up to a maximum of 8 points b. Procuring the Learning Partner – 2 points per element up to a maximum of 8 points c. Generating Learning and Knowledge – 2 points per element up to a maximum of 8 points | /48 |



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| | <p>Complementary Strategies and Learning Agenda.</p> <p>The presented methodology completed should at least demonstrate, the following elements:</p> <p>Note: the bidder may present these elements in any order using <u>both projects</u> i.e. each project does not need to cover all elements:</p> <p><u>ELEMENTS</u></p> <ol style="list-style-type: none"> 1. Description of the situation or context. 2. Description of the steps or actions that were taken 3. Description of the results that were achieved, including innovations and/or lessons learned. 4. Comments on challenges or problems that arose while organizing and conducting the project, and risk mitigation measures. | <ol style="list-style-type: none"> d. Providing Technical Assistance for Project Actors – 2 points per element up to a maximum of 8 points e. Improving Public Policy and Practice – 2 points per element up to a maximum of 8 points f. Integration of gender equality considerations throughout Learning Agenda – 2 points per element up to a maximum of 8 points | |
| RTC10 | Approach to Monitoring, Evaluation and Sustainability | | |
| | <p>The Bidder should demonstrate experience-setting approach for monitoring, evaluation and sustainability.</p> <p>The presented methodology completed should at least demonstrate, the following elements:</p> <p>Note: the bidder may present these elements in any order using <u>both projects</u> i.e. each project does not need to cover all elements:</p> <p><u>ELEMENTS</u></p> <ol style="list-style-type: none"> 1. Description of the situation or context. 2. Description of the steps or actions that were taken 3. Description of the results that were achieved, including innovations and/or lessons learned. <p>Comments on challenges or problems that arose while organizing and</p> | <p>Points will be awarded for each of the four (4) elements demonstrated:</p> <p>The elements should demonstrate the approach and explain relevant experience of similar delivered project(s) /initiative(s) of these categories:</p> <ol style="list-style-type: none"> a. Fostering collection and use of solid information/data sources – 2 points per element up to a maximum of 8 points b. Facilitating a clear understanding of education sector gaps and a confirmation method – 2 points per element up to a maximum of 8 points c. Building local capacity and ownership, while nurturing a culture and practice of evidence-based decision making and promoting continuous learning – 2 points per element up to a maximum of 8 points d. Partnering with local governments/Secretaries of Education to encourage evidence-based decision making for public policy – 2 points per element up to a maximum of 8 points | 40 |



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| | conducting the project, and risk mitigation measures. | e. Fostering collaboration with all stakeholders (service providers, potential social financiers, Ministry of Education, ETCs, teachers, parents, other) to ensure an ecosystem of coordination and knowledge sharing – 2 points per element up to a maximum of 8 points | |
| Sub-total – Qualification Delivering Project Methodologies Passing Mark 60%= 149 points | | | /248 |

Category 3: Proposed Team

Bidder’s Instructions:
To be considered eligible, each project, other education or Professional Development has to:

- have a start date within the last fifteen (15) years at the RFP closing date;

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| RTC11 | OFFER Director’s experience | | |
| RTC11.1 | <p>Education and Professional Development</p> <p>The Bidder should propose an OFFER Director, and demonstrate how the candidate meets the different aspects of the required profile.</p> <p>The bidder should provide certificate/diploma/degree for each of the qualifications demonstrated</p> | <p>a) Highest level of education completed in relevant discipline:</p> <ul style="list-style-type: none"> • University (PhD, Graduate, Undergraduate, degree in social science or social development related careers – 10 points • College or CEGEP diploma/certificate in social science or social development related careers – 5 points <p>b) Additional five (5) points for professional certificate from a *relevant discipline up to a maximum of 10 points.</p> <p>c) Other training in the disciplines of project management, innovative finance, results-based payment programming, gender equality – 2 points per completed certificate up to a maximum of 10 points</p> <p>* “relevant discipline” is defined as a discipline related to education, sociology, international development, political science, women’s studies or other social science, business administration, public policy, statistics or public relations.</p> | /35 |
| RTC11.2 | <p>Experience managing large education or social development projects</p> <p>The Bidder should demonstrate that the proposed OFFER Director has experience leading initiatives, for example as Project Manager or Director.</p> <p>In the context of each project presented to demonstrate this criterion, the</p> | <p>a) Duration of experience managing projects:</p> <ul style="list-style-type: none"> > 1 year to < 5 years = 2 points > 5 years to < 7 years = 4 points ≥ 7 years to < 10 years = 6 points ≥ 10 years = 10 points <p>b) Depth of experience managing education or social development projects:</p> <ul style="list-style-type: none"> • Experience spans 3 to 5 initiatives – 3 points | /30 |



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| | <p>proposed resource should have performed the following management duties:</p> <ul style="list-style-type: none"> • Ensuring overall quality and management oversight of all activities of the project; • Leading the development of and approving all key project documents; • Developing and maintaining networks of key stakeholders (government, civil society, other donors, private sector); • Ensuring the effective management and internal monitoring of project progress and results, including with dealing with project issues and problems as they arise. <p><u>Only projects with a duration of at least twelve (12) months (1 year) will be considered for evaluation.</u></p> | <ul style="list-style-type: none"> • Experience spans more than 5 initiatives – 4 points <p>c) 2 additional point for each additional 24 months' cumulative experience, in the following key areas to a maximum of 16 points:</p> <ol style="list-style-type: none"> 1. results-based payment programming 2. monitoring and evaluation of education projects 3. managing international development projects in Latam; 4. designing, launching or evaluating Pay-for-Results Challenges 5. contract management 6. leading strategic plans for either learning, capacity building, public policy advocacy or communications 7. gender equality analysis 8. managing blended finance initiatives with both public and private sector partners | |
| RTC12 | OFFER Lead Challenge Manager | | |
| RTC12.1 | <p>Education and Professional Development</p> <p>The Bidder should propose an OFFER Lead Challenge Manager, and demonstrate how the candidate meets the different aspects of the required profile.</p> <p>The bidder should provide certificate/diploma/degree for each of the qualifications demonstrated</p> | <p>a) Highest level of education completed in a *relevant discipline:</p> <ul style="list-style-type: none"> • University (PhD, Graduate, Undergraduate, degree in social science, social development, statistics, or performance management related careers – 10 points • College or CEGEP diploma/certificate in social science, social development, statistics, or performance management related careers 5 points <p>b) Additional five (5) points for professional certificate in a relevant discipline up to a maximum of 10 points.</p> <p>c) Other training in the disciplines of results-based financing, innovative or blended financing, monitoring and evaluation, statistical analysis, project management – 2 points per completed certificate up to a maximum of 10 points</p> <p>* “relevant discipline” is defined as a discipline related to education, sociology, international development, political science, women’s studies or other social science, business administration, public policy, statistics or public relations</p> | /35 |



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| <p>RTC12.2</p> | <p>Experience of the OFFER Lead Challenge Manager</p> <p>The Bidder should demonstrate that the proposed OFFER Lead Challenge Manager has experience in managing projects that incorporate a Pay-for-Results Challenge component.</p> <p>In the context of each project presented to demonstrate this criterion, the proposed resource should have performed the following management and coordination duties:</p> <p>Managing and implementing Pay-for-Results Challenge, including but not limited to:</p> <ul style="list-style-type: none"> • Developing tools (e.g. outreach documents, due diligence checklists); • coordinating Pay-for-Results Challenge (e.g. conducting screening of proposals; supporting or conducting due diligence of short-listed proponents; documenting approvals processes and funding decisions; making recommendations to the Project Review Committee or equivalent); • Supporting or preparing local contribution agreements or other financial instruments, based on templates; • Ensuring overall quality and management oversight of the design and launch of the project; • Working with and building relationships with local organizations. <p><u>Only projects with a duration of at least twelve (12) months will be considered for evaluation.</u></p> | <p>a) Duration of experience in managing projects that incorporate a Pay-for-Results Challenge component:</p> <ul style="list-style-type: none"> > 12 months to < 24 months = 2 points > 24 months to < 48 months = 4 points ≥ 48 months to < 60 months = 6 points ≥ 60 months = 10 points <p>b) Depth of experience:</p> <ul style="list-style-type: none"> • Experience spans 2 to 4 Projects – 2 points • Experience spans 5 projects or more – 3 points <p>c) Projects related to International development or education – 4 points</p> <p>d) Experience managing at least one (1) Project in LATAM country(ies) – 4 points</p> <p>e) 1 additional point for each 24 months' cumulative experience, in the following key areas to a maximum of 9 points:</p> <ol style="list-style-type: none"> 1. monitoring and evaluation of education projects 2. designing Pay-for-Results Challenges 3. launching and evaluating Pay-for-Result Challenges 4. working with private sector in designing, developing or implementing Pay-for-Results Challenges 5. contract management 6. leading development of and implementation of strategic plans for public policy advocacy, or communications 7. leading implementation of strategic plans for capacity building or knowledge sharing; 8. overseeing implementation of gender equality strategy 9. Working on innovative finance or blended finance initiatives with public and private sector | <p style="text-align: right;">/30</p> |
| <p>Sub-Total: Proposed Team Passing Mark 60% = 78 points</p> | | | <p>/130</p> |

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| Category 1: Bidder's Experience | 121 points |
| Category 2: Qualification Delivering Project Methodologies | 248 points |
| Category 3: Proposed Team | 130 points |



| | Total Evaluation |
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| Obtain the required minimum of 299 points overall for the technical evaluation criteria which are subject to point rating. The rating is performed on a scale of 499 points . | 499 points |

ALL OTHER TERMS AND CONDITIONS REMAIN UNCHANGED