

LAGREEN TECHNICAL ASSISTANCE FACILITY PROCUREMENT PROCEDURES

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1. INTRODUCTION

This document aims to clearly explain to bidders the procurement procedures governing all Technical Assistance Facility (TAF) projects funded under the LAGreen Fund Technical Assistance Facilities for Latin America and the Caribbean (LAC). It is based on the Policy & Procedures endorsed by the respective Technical Assistance Facility Committees and is in line with best practice.

These general guidelines are designed to accompany the relevant Request for Proposals (RFP) for the specific project which bidders will receive by e-mail, and which will include:

- Conditions of tender and conditions of contract
- Terms of Reference (TOR)
- Deadline for submission and for requests for clarification
- Format requirements

For all projects, bidders may download the CV, the counterparty information sheet and budget template [here](#).

All tender processes will be handled by the LAGreen TAF Manager, [Finance in Motion GmbH](#).

LAGREEN TAF PROCUREMENT REQUIREMENTS & GUIDELINES PER BUDGET THRESHOLD

This overview provides a threshold to the procurement procedures carried out by the TAF. Please pay close attention to the ‘type of procurement procedure’ (open, restricted, selective, single sourcing), which is directly aligned to the budget proposed.

Open tendering	
Short description	Projects are awarded through a public, competitive tendering process allowing all interested parties to submit tenders. Open procurement procedures involve the requirement for international notification, through publication of the tender notice in an official procurement journal, such as Devex and on the TAF website.
Budget limits	> USD 200,000

Selective tendering	
Short description	Projects are awarded through an abbreviated tendering process. The TAF Manager develops a shortlist of at least three service providers and approaches them with an RFP.
Budget limits	USD 75,000 - USD 200,000

Single sourcing	
Short description	The TAF Manager approaches up to three service providers with a track record in the geographical and technical area with ToR and requests a technical and financial proposal.
Budget limits	< USD 75,000

Exceptions:

Fast-Track Procedure	
Short description	<p>Applicable in exceptional cases and upon prior approval of the TAF Committee, when:</p> <ul style="list-style-type: none"> • There are few specialists in the particular field of expertise that is required • There is a duly justified degree of urgency • Confidentiality concerns are paramount • Previous tender failed to yield results • A consultant has been or is involved in the early project stages, continuity is necessary, and no advantage would be gained via competitive bidding.

2. TENDER PROCEDURE

2.1. Presentation of tender

The **tender** should be submitted by e-mail **only**, in two comprehensive pdf files. The **technical and the financial proposal** should be sent **in two separate e-mails** to the email of TAF Manager as specified in the invitation email.

E-mails containing the technical and financial proposal should be clearly labeled "Project name. Technical Proposal" and "Project name. Financial Proposal" and "Counterparty Information Sheet".

No financial information shall be contained in the technical proposal. **The financial proposal has to be password-protected!** The LAGreen TAF Manager will only request the password for the financial proposal if the respective technical proposal obtains the required minimum of evaluation points (see sections 4 and 5).

The deadline for the receipt of the technical proposal is defined in the letter of invitation. All proposals should be sent to the email specified by the TAF Manager in the invitation email. All proposals received after that deadline will be rejected automatically without evaluation.

2.2. Language of the tender

Technical and financial proposals as well as all communication related to the tender shall be in English language. Additionally, the consultant(s) must be fluent in any other language as shall be specified in the invitation letter by the TAF Manager.

2.3. Contracting authority

The contracting authority is the LAGreen TAF, represented by Finance in Motion. A specific contract will be concluded between the LAGreen TAF and the consultant – some cases also a tripartite contract with the beneficiary –for the performance of the assignment.

2.4. Validity period of tenders

The period of validity of tenders is **60 days** from the deadline for receipt of tenders indicated in the invitation letter.

2.5. Request for additional information

Any question, communication or request for additional information concerning an RfP is only permitted in writing (via an email) to the LAGreen TAF. Such requests should be sent no later than **eight (8) days** before the deadline for the submission of proposals. If any clarification is necessary, the answers will be communicated simultaneously in writing to all shortlisted bidders via email or if applicable to the LAGreen [website](#).

2.6. Confidentiality

All documents shared with the bidders in the framework of this tender process are to be treated as strictly confidential and may not be shared with third parties without prior approval of the LAGreen TAF.

2.7. Cancellation

The LAGreen TAF reserves the right to cancel the tender process without notice at any time if it deems so appropriate. Bidders should only participate in the tendering process with the understanding that they would not be entitled to any form of compensation should the LAGreen TAF decide to interrupt the tender process before the contract is signed.

3. CONTENT OF THE TENDER

3.1. Counterparty Information Sheet

The bidder is requested to provide in writing all the information necessary for its identification, according to the counterparty information sheet which can be downloaded on the LAGreen TAF website under [tender documents](#). Please make sure to return the Counterparty Information Sheet as an **excel file**.

3.2. Technical proposal

The technical proposal shall address the requirements of the ToR and comprise the following:

- I. A short company/organisation profile giving an overview of the company's/organisation's relevant experience aligned with the objectives of the proposed assignment, notably with relevant, ongoing and up to date experience and reference projects in the sector and the region for the last 5 years disclosing: location, duration of project, donor, volume of the project, and duly reflecting technical expertise and achieved results (max. two pages)
- II. Critical analysis of the ToR (max. two pages)
- III. Proposed Concept (max. twelve pages)
 - a. Scope of work
 - b. Methodological approach¹
 - c. Overview of implementation concept and project organisation
 - d. Work plan including staffing schedule²
- IV. Team composition (max. two pages without CVs)
 - a. Description of the team members: the proposed team members should comply with the requirements of the ToR. The response should demonstrate why their expertise and previous experience is relevant for the project and how it will be used for the benefit of the project.
 - b. Detailed description of the tasks to be performed by each team member (including backstopping staff in the home office).
 - c. CVs of the proposed key staff, including local consultants, according to the CV template provided under [tender documents](#).

Parts II and III of the proposal shall not exceed **fourteen pages** in total. CVs shall not exceed **four pages** each in the format provided.

3.3. *Financial proposal*

The financial proposal shall be structured using the budget template provided under [tender documents](#). The bidder will verify the applicability of taxes on its own account and in the event taxes are applicable, the bidder should list them separately and be included as part of the budget.

All costs for procurement and negotiations are to be borne by the Consultant. All expenses shall be expressed in US Dollar.

4. ORGANIZATION OF SERVICES AND REPORTING

The services will meet the requirements laid out in the ToR. The Consultant will coordinate all of its activities with the LAGreen TAF Manager.

The bidders shall suggest the composition of a team considered most suitable for a successful undertaking of the assignment. The bidders are also allowed to form a consortium with other consulting companies or

¹ Bidders should not simply quote the ToR but should demonstrate how their approach will address the requirements of the TOR and the critical analysis made on the ToR.

² This will include a quantitative appreciation of the workload required (in expert-days) for each of the specified subtasks for each of the team members.

individual consultants to complement their expertise. The Consultant will nominate one person (lead consultant) to be the main counterpart to the LAGreen TAF Manager. He or she will be the first point of contact for all exchange of information.

Any change in the composition of the team after the submission of the bidder's proposal shall be subject to prior written approval by the LAGreen TAF. Any replacement shall have comparable skills, background and experience.

The Consultant will provide the LAGreen TAF with a draft of the outlined deliverable(s) in line with the project's schedule and the requirements of the assignment. The LAGreen TAF Manager will comment on the documents within an agreed time frame following the submission of the deliverables. The final deliverables will incorporate the comments that were given. The Consultant will have to be capable of collecting all the necessary data for the preparation of the deliverables.

The Consultant will be available to the LAGreen TAF Manager for ad-hoc reporting via e-mail and telephone.

5. TENDER EVALUATION

The evaluation of the tenders received will follow a four-step approach, depending on the applicable procurement method:

Step 1: Prequalification

Only the technical proposal will be opened on the submission date. The quality of each technical proposal will be evaluated according to the award criteria listed under section 6 of this document. Based on the evaluation of the technical proposals a shortlist of candidates will be contacted via email.

Step 2: Interviews with short-listed candidates

After the evaluation of the technical proposals and completion of the first step of the evaluation process, the LAGreen TAF Manager will conduct telephone interviews with the short-listed consultant(s) of highly ranked bidders. The outcome of the telephone interview(s) will be included in the evaluation.

Step 3: If the technical proposal achieves minimum required score, evaluation of the financial proposal

For bidders obtaining a minimum of 60 points on their technical proposal and proposed staff (including interviews), the financial proposal will be opened.

The financial proposal will be evaluated using the criteria described in section 6 of this document.

Step 4: Final selection of winning tender overseen by the LAGreen Technical Assistance Facility Committee (TAFCOM)

The number of points given for the financial proposal will be added to the number of points awarded for the technical proposal. The tender with the highest total number of points will be considered the winning tender. The bidder of the winning tender will then be invited for contract negotiations by the LAGreen TAF. The evaluation of the technical and financial proposals including the final selection will be overseen by the LAGreen Technical Assistance Facility Committee (TAFCOM).

6. AWARD CRITERIA

The LAGreen TAF will, in consultation with (if applicable) the beneficiary of the project, select the most favorable offer, applying the following award criteria:

Criterion		Max Points
A	Quality of the technical proposal	35
A-1	Analysis of the ToR	10
A-2	Proposed approach	25
B	Qualification and composition of the team	45
B-1	Specific professional skills and expertise of proposed experts that are relevant to implement the ToR	20
B-2	Appropriate team composition enhancing the delivery of consultancy services	15
B-3	Regional expertise ensuring in-depth knowledge of the local environment	10
C	Financial proposal	20
C-1	Cost vs quality analysis	9
C-2	Appropriateness of the financial proposal	8
C-3	Proximity to approved budget	4
Total		100

7. MONITORING AND EVALUATION

During project implementation, the consultant shall closely cooperate with the TAF Manager, keeping him/her up to date regarding all significant (incl. anticipated/expected/required) deviations from the ToRs and providing project outputs as defined in the ToRs.

The LAGreen TAF will be required to prepare a brief internal evaluation report on the consultant's performance. Information which is tracking the performance will be maintained at the LAGreen TAF. Any specific problems with acceptance of deliverables will have to be resolved by the consultant before invoices are approved and payments are made.

8. REMUNERATION

Subject to contractual agreement, the consultant shall be paid at the rates set out in its original financial offer. Payments shall be subject to prior acceptance of the deliverables. Any specific problems with the acceptance of deliverables will have to be resolved by the consultant before invoices are approved and payments are made, as defined in the ToR. Depending on the type of project and in line with the contract, the consultant shall submit invoices in accordance with the following provisions:

Option 1

Pre-financing: The consultant will be entitled to a pre-financing payment of at least 15 % of the total value of the TA assignment.

Interim Payment(s): [an] interim payment[s] shall be paid after completion of certain project stages, against presentation of an invoice. Payments shall be subject to prior acceptance of the deliverables and the consultant's reports by the TAF Manager and (in case of a tripartite contract) by the beneficiary.

Final Payment: The final payment is subject to approval of all deliverables and the Final Report by the TAF Manager and (in case of a tripartite contract) by the beneficiary.

Option 2 – As a rule, applies for impact assessment services projects

Quarterly Payments: The consultant shall submit an invoice at the beginning of each quarter, which shall cover the services provided during the preceding quarter. The consultant will be paid only for the services conducted and support given, which can be lower than estimated.

For other tender documents, please see separate documents in the LAGreen [website](#).