Date: 08 January 2021

Reference: Request for Proposal (RFP) no. 2020/034 - Consultancy Services for assessment of GCF's Constituents Relationship Management (CRM) System

ADDENDUM NO. 1
This Addendum is issued to complement and will constitute integral part of the Request for Proposals. The original Request for Proposals Document will remain in full force and effect. Respondents shall take this Addendum into consideration when preparing and submitting their proposals.

I. Responses to Requests for Clarifications

No.	Clarifications from Bidders	Responses from the GCF
1.	Aiming to clarify the efforts and time that will be necessary during the assessment phase of the project, especially for the interviews, we kindly ask you to confirm: a. Approximately how many stakeholders should be interviewed and included in the workshops? b. If you already have a stakeholders' list, could you provide the information regarding their roles? c. Which are the business units included in the assessment?	The following Offices / Divisions, but not limited to, shall be interviewed: • OED - Office of Executive Director o Accreditation Manager or designated personnel o Chief of staff and designated personnel • OPM - Office of Portfolio Management o Head of OPM o Senior Quality Assurance and Monitoring and Evaluation Specialist o Senior Portfolio Management Specialist o Senior Results and Data Management Specialist • DCP - Division of Country Programming o Regional Manager - Asia-Pacific o Regional Manager – Africa o Regional Manager - Eastern Europe and Central Asia o Regional Manager – Latin America and the Caribbean o SAP/PPF/EDA Manager o DCP team assistant and 3 regional desk officers • DMA - Division of Mitigation and Adaptation o Senior specialists in Agriculture, Livelihoods and Wellbeing o Senior specialists in Land-use, Forests and Ecosystems o Senior specialists in Built Environment o Senior specialists in Energy and Industry • Division of Private Sector Facility's (DPSF) o Climate Equity Funds managers o Financial Institutions managers o 2 Selected officers • DEA - Division of External Affairs o Head of DEA o Partnerships and Outreach Specialist o Resources mobilization team • DSS - Division of Support Services o Procurement specialists o Software Innovation and Integration Manager o Event Management Specialist • OHR - Office of Human Resources o Head of HR o HRBP and Recruitment Specialist • OGA - Office of Governance Affairs o Board Information Manager o Board Affairs Manager o Multilateral Governance Manager • OGC - Office of the General Counsel o Latin America and Caribbean representative o Africa representative o Asia-Pacific and Eastern-Europe representative • Technical assistants

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2.	Aiming to plan for an appropriate project methodology, we kindly ask you to confirm if GCF will assign an internal project team, and what will be its structure (for example, one project manager, two staffs, a sponsor, and an executive committee of three)	Internal project team will be composed by:- o Head of Knowledge and Change Management (on demand) o Project manager (part time) o Internal consultant (part time)
3	Aiming to refine the technical approach of our proposal accordingly to GCF's expectations, we would like to know which are the KPIs that are already used by GCF to monitor performance. Also, which ones are used to understand your relationships with the stakeholders that will be included in the CRM related processes. If you already have identified new KPIs that must be included in the CRM, please, include them in your response.	No official KPIs are in place to monitor performance related to the CRM. Suggested KPIs are welcome.

4	Aiming to define the deliverables that should be included in our technical proposal, we kindly ask you to confirm the following:
	a. In the process of selecting suppliers, contract models are relevant aspects of procurement's strategy. Would you like the project to include an evaluation around possible contract models for CRM tools?
	b. The implementation of new software includes some aspects of IT that go beyond the definition of the processes that will use the new tool, or the tools' functionalities. For example, aspects related to IT infrastructure, to security (definition of access profiles, access log), to communications (data traffic capacity) and to governance models (frequency and processes for updating technical documentation). Should any of these aspects – or other related aspects – be included in the proposal?
	   i. If yes, please, inform us if you already use ITIL or COBIT. If you use another model, please, provide its name.
	c. Is the terms of reference (TOR) mentioned in the RFP equivalent (or similar) to a RFI (request for information) or to a RFP (request for proposal)?
	   i. If not, should our proposal include the analysis and preparation of a RFI? We recommend it to be included in the project because a RFI allows the understanding of the actual detailed functionalities that the market is ready to provide. Based on this feedback from suppliers, the project team may refine both the roadmap and the budget for the software implementation. The RFI requires some response time to be given to the software suppliers, and therefore must be well planned to guarantee that it will not impact the project's timeline.
	   ii. Should we include an initial selection of CRM software suppliers, although the TOR remains supplier agnostic?
		Answer to (a): Yes
		
		Answer to (b): Yes, wherever necessary, the implementation proposal may include aspects of IT such as the IT Infrastructure, Security, and Governance. The ICT in the GCF is selectively deploying several elements of both these frameworks: ITIL for IT Service Management and COBIT for IT Governance in addition to the ISO-27001 framework for Information Security Management System.
		
		Answer to (c)(i): Terms of reference define the purpose and structures of a project, committee, meeting, negotiation, or any similar collection of people who have agreed to work together to accomplish a shared goal. Terms of reference show how the object in question will be defined, developed, and verified. If necessary, a RFI should be part of the TOR
		
		Answer to (c)(ii): Yes

5	Aiming to confirm the level of maturity expected from the CRM software, we kindly ask you to confirm if you would like us to include the evaluation of tools that include artificial intelligence.	Yes
6	Regarding the expected details around benchmarks, would you like the proposal to include the purchase of benchmark reports?	No
7	Regarding administrative aspects of the project: a. Billing should be sent to Korea? b. Could you please provide the model contract?	Yes, Invoices will be sent to GCF's HQ in Songdo, Incheon, South Korea. A copy of the Model Contract is attached to this Addendum 1.

No.	Clarifications from Bidders	Responses from the GCF
8	Could you please provide a copy of the Model Contract for review?	A copy of the Model Contract is provided and attached to this clarification response.
9	Would it be possible to provide a current estimate of the total number of constituents in to be managed in the CRM practice, and an estimate of the potential growth of in % on an annual basis?	There are several different solutions currently in place and a consolidated number of constituents is not available.
10	It may be more efficient (for GCF and the stakeholders) to combine activities in Phase 1 and Phase 2, for example in interviews and assessments. Will such efficiency gains be considered given the Phased Approval being requested?	Yes, these phases might be combined.
11	Could you please provide a summary of the number and state of the current siloed solutions?	Seven different solutions were identified tackling issues related to CRM. Those solutions should be evaluated, but it should not be limited to those ones.
12	Implementation roadmaps typically are dependent on IT/Vendor choices. Agnostic plans tend to be higher level in terms of granularity. Is this what is expected?	A comparison among different IT/Vendors shall be performed to provide a more detailed plan.
13	It is indicated that activities and deliverables may change as a result of finding in the projects. Bidding Firm's prices projects based on agreed scope and deliverables and uses a change management procedure when there are changes in scope and deliverables to re-price projects that have started. Does UNGCF have a procedure for managing change requests, or will Bidding Firm's process be used?	The GCF may change the deliverables later in consultation with the successful contractor. The GCF encourages that the Bidding Firm proposes a process in line with its proposals.
14	Given the potential changes in scope and activities, are these due dates indicative, or fixed?	The due dates are indicative/tentative only.
15	Please can you explain the steps and process to be followed for evaluation and certification? What are the typical timelines we should expect for interim approvals? How many people need to be involved in the approval process, and what are their hierarchy levels?	Upon receiving the deliverables, the KCM team and designated personnel will review the document to verify if it complies with the TOR and for quality check. Reviews usually take up to two weeks. The final clearance is responsibility of the Head of Knowledge and Change Management.
16	Given the 12-week expected timeline, do you mean 28 March or 28 May?	**This was an error. The expected end date is 28 May 2021**
17	Bidding Firm is obligated by NDA not to explicitly reveal client related details unless approved by clients. This is especially relevant in initial phases of RFP projects. We can provide Country, Industry, and Role data initially and seek references as part of a final negotiation phase later. Is this acceptable to UNGCF?	This is acceptable.
18	What do you mean with "associated consultants"? Is this a reference to partnerships, or is there another understanding for this term? Ie to UNGCF?	"Associated consultants" refers to another party other than the Contractor
19	Will GCF be providing an internal PM or coordinator for the project? What % of time will such a role be available for the project?	Yes. There will be a staff assigned to this project providing full supervision. Day to day activities should be performed by the successful contractor.
20	Some of the information requested in the CV are not compliant with Bidding Firm's diversity and inclusion policy, for example Date of Birth or Nationality. Can information that is not compliant with our policies be excluded?	Yes, this is acceptable. You only have to mention in your proposal that your diversity and inclusion policy excludes this information.
21	We assume the limitation of 7 in the number of weeks is only an example. Is this correct?	Yes, it is correct.
22	Bidding Firm does not work on time and material basis. Bidding Firm uses relevant research, data, and individual team member experience in all of its engagements. To bundle all of these assets in a project and reduce the overall risk for clients we offer fixed price contracts based on scope and deliverables. An average daily rate can be calculated based on overall effort (in days) and total fixed price of the engagement. Will this suffice?	Yes, this is acceptable.

No.	Clarifications from Bidders	Responses from the GCF
23	There is no mention of tracking fund contributions by constituents, and reporting fund utilization to them in the terms of reference - is this excluded from scope of CRM system assessment? Is there an integration with a financial management / accounting system involved if this function is not part of CRM system?	This is part of the assessment. The work to be performed should analyze and recommend if this kind of activity should be performed by a CRM system or not. It will depend on the recommendation received during the assessment.
24	"ENVISIONED TIMELINE (Tentative dates) - The envisioned start date is 8th March 2021. Final deliverables shall be delivered on 28th March 2021. A detailed timeline shall appear in the technical proposal." – Could you verify the timeline mentioned in the RFP	There is a mistake in the TOR; The envisioned start date is 8th March 2021; Final deliverables shall be delivered on **28th MAY 2021;** The entire assessment will take 12 weeks of work.
25	Where will be the location of the execution of the RFP project?	The selected Firm might work remotely. All engagements with GCF representatives will be through digital tools, preferably, but not limited to, MS-Teams.
26	Considering the current situation with COVID 19, up to what point can be the consultancy, could be this in virtual mode or in which percentage has to be present in person?	Due to the COVID 19 pandemic, the entire project is expected to be virtual.
27	Which is the budget of the consultancy by the RFP project?	The GCF cannot share the budget information for this project. It is up to the bidder to propose its price.
28	Is it possible to extend the term of delivery of the CV of the consultant?	The GCF does not understand this question. In any case, the bidder is required to submit the CVs of its proposed key personnel for the project in its Technical Proposal.
29	Considering the current situation, is it possible to extend the terms to deliver the proposals?	It will be possible to extend the deadline/Closing Date by one week. **It means the deadline will be changed from 15 January 2021 to 22 January 2021**.