

12 March 2021

Reference: RFP 2021/006

## ADDENDUM NO. 2

### **Request for Proposals no. RFP 2021/006 – Consultancy Services for Evidence Review on Behavioural Change**

This Addendum no. 2 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.

Please find attached the GCF's responses/answers to the clarifications submitted by Bidders of this RFP.

1. Does the GCF have guidance on the time period that the evidence review should cover (i.e., publications before a certain year should be excluded from the evidence review)?

**GCF's Answer: The project team will confirm the cut off year in association with the consultancy firm at the start of the assignment.**

Please take note.

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<b>No.</b>	<b>Clarifications from Bidders</b>	<b>Responses from the GCF</b>
<b>1</b>	Regarding the “pre-built templates” referred to in Technical Requirements 3.1(b) of the RFQ, can you provide an indication of the number of pre-built templates and (approx.) the number of automated responses expected for each pre-built template? This will assist with the estimation of the automation effort and on-going support.	
<b>2</b>	Would the “pre-built templates” be GCF’s pro forma/standard funded activity agreements for different types of investments or would they also include precedents (i.e. previously negotiated funded activity agreements with counterparties)? In this regard, would GCF require a template standardization exercise as it could ultimately improve system usability and supportability?	
<b>3</b>	When referring to “non-licensed users” in Technical Requirements 3.2(c) of the RFQ, would the “non-licensed users” GCF have in mind here be the counterparties/Accredited Entities? In other words, GCF users would be licensed users and the RFQ is asking for a feature where Accredited Entities (as non-licensed users) can enter the platform to add comments, make changes and approve certain sections of the document?	
<b>4</b>	Please confirm whether there is a preferred format in which we should provide our Technical Offer file/document - i.e. whether respondents are free to create their own form of response documents in word or whether there is a template we should use. We assume as a minimum that the response should document how our solution meets the Technical Requirements described in Annex 1 (Terms of Reference for Contract Automation Platform). If there is additional information that we should provide, (and a preferred format for this information), please could you specify what you would find most useful.	
<b>5</b>	Please can you clarify what you require for “Company Profile Others” in respect of the Additional Documents to be submitted	



	alongside the Technical Offer? We assume this could just be a snapshot/overview about the Vendor but it would be helpful to check whether they have something more specific in mind.	
6	Would it be possible to please see any templates you have of the pre-FAA/FAA and the Term Sheet?	
7	<p>We would appreciate if we could please get clarity on the below points:</p> <ul style="list-style-type: none"><li>• Number of contract types managed by GCF today - Unique agreement types (e.g. NDA, MSA, SOW, Lease agr, etc.)</li><li>• Number of Templates - tied to the contract types above (e.g. variations of SOW based on geo or LOB)</li><li>• Any Integrations in scope with existing systems like ERP, CRM, P2P, etc.? (e.g. Workday, Ariba, SAP, Dynamics, etc.)</li><li>• Will GCF use electronic signatures to execute contracts? If yes, please specify e-signature application?</li><li>• Any legacy contracts needs to be migrated to the new platform? If yes, how many?</li><li>• Has the meta data already been extracted from the above legacy contracts?</li><li>• What is the tentative timeline for project kick off?</li></ul>	
8	In order to better understand your procurement process. Once an RFQ is submitted, is the vendor primarily selected on basis what is presented in it or vendors are short listed with further selection done post RFQ submission, for example another demo/discovery call?	<b>Once the RFQ is closed and the Bidder submitted its offers, the GCF Evaluation Committee will review and evaluate the offers based on what were submitted. There will be no more call for another demo/discovery call.</b>
9	As we are working through the RFQ there is some more information we require around your requirements. Reason being, we have different packages of our one-time implementation which vary depending on customers' requirements and therefore in order to present the best package forward we will need that information. Please find ATTACHED a questionnaire with all the questions.	<b>Kindly find the answers below.</b>



No.	Category	Question	GCF Responses
1.	Agreement Process	Can you please describe different agreements/contracts types that you currently use?	
2.	Agreement Process	Do all agreements follow the same business flow/process?	
3	Agreement Process	Do any of the following processes need to be automated (ex: auto expiration) or executed in mass (ex: mass amendment)?  - Amendment  - Renewal  - Expiration  - Termination	
4	Agreement Process	Will renewals be manual or automated if applicable? Please detail any automation process required.	
5	Agreement Process	If Termination is automated, please detail the process.	
6.	Agreement Process	Do you have any contracts that never receive redlining? If so, please list them.	
7	Agreement Process	How many contracts will be considered 'Self-Serve' (auto generated and sent for signature) as opposed to requiring legal intervention?	
8.	Approvals	What do your approval processes look like?	
9	Data Migration	Do you have any historical data or files that need to be migrated into your new CLM repository? If so: -How Many? -Do they have supporting data to populate the agreement fields? -What is the maximum document size?	
10	Data Migration	Are all of your legacy contracts in the same system currently?	
11	System Configuration	How many agreement types will need to be supported by the page layouts of the system?	
12	System Configuration	How many data points (fields) will be required to support each agreement type? (Ex. ~30-40 is common for each agreement)  *Note - consider reporting and lifecycle management as well as whether a field can be reused across multiple agreement types (Ex. Effective Date, Status, etc.)	



13	System Configuration	Will third party paper need to be supported? If so, please describe to what extent.	
14	System Configuration	Please detail any notifications (email, chatter, etc.) required and when. (Ex. Assignments, Approvals, Rejects, Terminations, etc.)	
15	System Configuration	Do your executed documents need to be OCR'ed to support searchable text?	
16	System Configuration	Do you need contracts to auto-activate after the eSignature process completes?	
17.	Template Administration	How many clauses does each agreement type have?	
18	Template Administration	How many of the clauses from each template will need to be locked if any?	
19	Template Administration	How many supporting documents are required per agreement type if any? (Ex. Letter of Intent, Contact Form)	
20	Template Administration	What formats for document output will need to be supported? (PDF, Docx)	
21	Template Administration	Please provide a list of different Agreement Types that you will require	
22.	Template Administration	How many unique templates will be necessary to support each agreement type? *Note - Consider that common formats and layouts among agreement types may be able to be consolidated into 1 template	
23.	Template Administration	How many agreement types would you like supported by the auto document generation feature? (Ex. NDA, MSA, Order Forms, SOWs)	
24.	Template Administration	How many languages and regions will need to be supported for each agreement?	

Please take note.

Kind regards,

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