

Request for Proposal no. RFP 2022/011(hn) – Implementation of Green Climate Fund’s Constituents Relationship Management (CRM) System and Related Processes

1. Background

- 1.1 The Green Climate Fund (the “GCF”, or the “Fund”) was established with the purpose of making a significant and ambitious contribution to the global efforts towards attaining the goals set by the international community to combat climate change. In the context of sustainable development, the Fund will promote a paradigm shift towards low-emission and climate-resilient development pathways by providing support to developing countries to limit or reduce their greenhouse gas emissions and to adapt to the impacts of climate change. The Fund’s headquarters are located in Songdo, Incheon City, Republic of Korea.
- 1.2 The GCF was designated as an operating entity of the financial mechanism of the United Nations Framework Convention on Climate Change (“UNFCCC”). It is governed and supervised by a Board that has responsibility for funding decisions pursuant to the Governing Instrument for the Green Climate Fund (the “Governing Instrument”). It is supported by an independent Secretariat, accountable to the Board, having management capabilities to execute day-to-day operations of the GCF, providing administrative, legal and financial expertise.

2. Invitation

- 2.1 Through this request for proposals (RFP), the GCF is seeking to contract qualified, reputable and experienced companies/corporations/firms (the "Firm") to Implement Green Climate Fund’s Constituents Relationship Management (CRM) System and Related Processes.
- 2.2 The terms of reference (TOR) included in the attached Annex 1 herein shall provide the assignment's details and expected deliverables.
- 2.3 Proposals must be submitted to the GCF no later than **Monday, 02 May 2022 @ 18.00 hours Korean standard time.**
- 2.4 The RFP includes the following annexes:
 - Annex 1 Terms of Reference
 - Annex 2 Requirement for Firm’s Proposals
 - Annex 3 Evaluation Criteria
 - Annex 4 Company Profile Form
 - Annex 5 Acknowledgement Letter
 - Annex 6 Timeline
 - Annex 7 Model Contract
- 2.5 Should the GCF accept your proposal, the terms outlined in this RFP, including all the annexes listed above, shall form part of any contract. Any such agreement shall require compliance with all factual statements and representations made in the proposal, subject to any modifications agreed to by the GCF in the context of any negotiations entered into it.
- 2.6 The GCF may, at its discretion, cancel the requirement in part or in whole. It also reserves the right to accept or reject any proposal and to annul the selection process and reject all proposals at any time prior to selection, without thereby incurring any liability to the Tenderers.

- 2.7 Tenderers may withdraw their proposal after submission provided that the GCF receives written notice of withdrawal before the deadline prescribed for submission of proposals. No proposal may be modified after the deadline for submission of proposals. No proposal may be withdrawn in the interval between the deadline for submitting proposals and the expiration of the proposal validity period.
- 2.8 All proposals shall remain valid and open for acceptance for ninety (90) calendar days after the deadline for submission of proposals. A proposal valid for a shorter period may be rejected. In exceptional circumstances, the GCF may solicit the Tenderer's consent to extend the period of validity. The request and the responses to that shall be made in writing.
- 2.9 Effective with the release of this solicitation, all communications relating to this RFP must be directed only to the Head of Procurement by e-mail at procurement@gcfund.org and copy to hngau@gcfund.org . Tenderers must not communicate with any other personnel of the GCF regarding this RFP.
- 2.10 This RFP is issued under the GCF Administrative Guidelines on Procurement ¹. Information regarding the guidelines can be found at http://www.greenclimate.fund/documents/20182/574763/GCF_policy_-_Administrative_Guidelines_on_Procurement.pdf/b767d68e-f8b7-46d1-a18c-b6541f3dc010

3. Joint Venture, Consortium or Association

- 3.1 If the Tenderer is a group of legal entities that will form or have formed a joint venture, consortium or association at the time of the submission of the Proposal, they shall confirm in their Proposal that:
- a) they have designated one party to act as a lead entity, duly vested with authority to legally bind the members of the joint venture jointly and severally,
 - b) if they are awarded the contract, the contract shall be entered into, by and between GCF and the designated lead entity, who shall be acting for and on behalf of all the member entities comprising the joint venture.
- 3.2 After the Proposal has been submitted to GCF, the lead entity identified to represent the joint venture shall not be altered without the prior written consent of the GCF. Furthermore, neither the lead entity nor the member entities of the joint venture can submit another proposal:
- a) either in its own capacity; nor
 - b) as a lead entity or a member entity for another joint venture submitting another Proposal.
- 3.3 The description of the organization of the joint venture/consortium/association must clearly define the expected role of each of the entity in the joint venture in delivering the requirements of the RFP, both in the Proposal and the Joint Venture Agreement. All entities that comprise the joint venture shall be subject to the eligibility and qualification assessment by GCF.
- 3.4 Where a joint venture is presenting its track record and experience in a similar undertaking as those required in the RFP, it should present such information in the following manner:
- a) Those that were undertaken together by the joint venture; and
 - b) Those that were undertaken by the individual entities of the joint venture expected to be involved in the performance of the services defined in the RFP.
- 3.5 Previous contracts completed by individual experts working privately but who are permanently or were temporarily associated with any of the member firms cannot be claimed as the

¹ Annex II "Corporate Procurement Guidelines on the Use of Consultants"



experience of the joint venture or those of its members but should only be claimed by the individual experts themselves in their presentation of their individual credentials.

- 3.6 If a joint venture's Proposal is determined by the GCF as the most responsive Proposal that offers the best value for money, the GCF shall award the contract to the joint venture, in the name of its designated lead entity. The lead entity shall sign the contract for and on behalf of all other member entities.

4. Request for Clarification of RFP Documents

A prospective Tenderer requiring any clarification of the solicitation documents may notify the GCF in writing to the e-mail address procurement@gcfund.org and copy to hngau@gcfund.org by the specified date and time mentioned in Annex 6. **The subject line of the e-mail MUST have the reference number and title of the RFP.** The GCF shall respond in writing to any request for clarification of the solicitation documents that it receives by the due date published in Annex 6. Written copies of the GCF response, which contain information that may be of common interest to all Tenderers (including an explanation of the query but without identifying the source of inquiry), shall be posted on the GCF website and communicated via e-mail.

5. Amendments to RFP Documents

At any time before the deadline for submission of proposals, the GCF may, for any reason, whether at its own initiative or in response to a clarification requested by a prospective Tenderer, modify the RFP documents by amendment. The amendments will also be posted on the GCF website and communicated via e-mail. In order to allow prospective Tenderers reasonable time in which to take the amendment into account in preparing their proposals, the GCF may, at its sole discretion, extend the deadline for the submission of the proposal.

6. Language of Proposals

The proposals prepared by the Tenderer and all correspondence and documents relating to the proposal exchanged by the Tenderer and the GCF shall be written in English. Supporting documents and printed literature furnished by the Tenderer may be in another language provided they are accompanied by an appropriate translation of all relevant passages in English. In any such case, the translation shall prevail for interpretation of the proposal. The sole responsibility for translation and the accuracy thereof shall be the Tenderer's responsibility.

7. Submission of Proposals

Format and form of submission of bids: Tenderers are requested to send their proposals preferably² through the GCF Supplier portal at <https://gcf.supplier.ariba.com> (a supplier manual can be found on the GCF website <https://www.greenclimate.fund/who-we-are/procurement> as an attachment under this RFP) or via e-mail to procurement@gcfund.org and copied to hngau@gcfund.org

² Suppliers shall note that GCF will be phasing out e-mail submission in the near future, therefore suppliers are encouraged to register and submit their Bid/Proposal through the GCF Supplier portal (SAP Ariba)

a) Submission through the Supplier Portal (SAP Ariba)

- (i) Open <https://gcf.supplier.ariba.com/>
- (ii) Click Register Now
- (iii) Fill in Company Information, Fill in User account information and details under 'Tell us more about your business.'
- (iv) Check 'I have read and agree to the Terms of Use and 'I have read and agree to the SAP Ariba Privacy Statement' then click 'Register.'
- (v) Check your e-mail and click the activation link.
- (vi) Fill in additional information required, click Save and Close.
- (vii) Your company information will be submitted to GCF and reviewed and approved.
- (viii) Once you register, please send an e-mail to procurement@gcfund.org and copy the responsible procurement staff for this RFP (i.e. For this RFP, it is: hngau@gcfund.org) with the RFP number and title as the e-mail reference and confirm that you are interested in submitting a bid. You will then be invited to participate in the RFP. You will receive the RFP event notification e-mail from the Green Climate Fund with a link to access the RFP. This link can be used only once. If you require to access the portal after you have activated the link, you can log in on <https://gcf.supplier.ariba.com> with your username and password.
- (ix) Review Pre-requisites and Click "I accept the terms of this agreement".
- (x) Open the Technical Section of the RFP section and download the RFP document and technical proposal submission forms
- (xi) Open the Financial Section of the RFP and download the financial bid submission forms
- (xii) When ready to submit your bid, upload the technical proposal under the TECHNICAL section and the financial bid under the FINANCIAL section. Please **DO NOT** enter or upload any financial information under the TECHNICAL section, as this may result in disqualification.
- (xiii) Click 'Submit Entire Response' to submit the bid.

(For detailed instructions on how to access and submit a bid, see the supplier manual. It is recommended that Tenderers register on the portal as early as possible.)

b) Submission via E-mail

Two separate files (Technical and Financial Proposals) should be attached to the e-mail as per the instructions below.

The technical file should contain the technical proposal and be named as follows:
RFP 2022 011 – TECHNICAL PROPOSAL - (Name of Tenderer)

Please **DO NOT** include any financial information in the technical proposal, as this may result in disqualification.

The financial file should contain the financial proposal and be named as follows:
RFP 2022 011 – FINANCIAL PROPOSAL - (Name of Tenderer)

The subject line of the e-mail should be as follows:
RFP 2022 011 – Implementation of GCF’s CRM System (Name of Tenderer)

The Financial Proposal **MUST** be password protected. The authorized procurement officer will contact the Tenderers that pass the qualifying technical score for the password to open the Financial Proposal. Tenderers should **NOT** send the password to the financial proposal until



they are requested to do so by the procurement officer. Financial Proposals that are submitted without password protection may be rejected for non-compliance.

All prospective Tenderers are kindly requested to return the completed Acknowledgement Letter of RFP receipt (Appendix 5) by the date indicated in Appendix 6, duly signed by an authorized representative, via e-mail, advising whether they intend to submit a proposal by the designated closing date/time. Please notify the Procurement Specialist immediately if any part of this RFP is missing or illegible.

8. Late Proposals

Any proposals received by the GCF after the deadline for submission of proposals prescribed in Annex 6 of this document shall usually be rejected.

9. Opening of Technical Proposals [NOT APPLICABLE]

Technical Proposals will be opened on the date indicated in Annex 6. The purpose of this public opening is to record the names of Tenderers having submitted proposals by the due date and time. Only technical proposals will be opened at the public opening. The financial proposals will not be opened. Tenderers submitting proposals are welcome to send one (1) representative, with proper authorization from their company, to observe the opening and recording of proposals received.

10. Opening of Financial Proposals

The GCF shall notify in writing those Tenderers that have achieved the minimum qualifying technical score and request for the password for the Financial Proposals.

11. Corrupt, Fraudulent, Coercive, Collusive and other Prohibited Practices.

The GCF requires that all GCF staff members, tenderers/bidders, suppliers, service providers and any other person or entity involved in GCF-related activities observe the highest standard of ethics during the procurement and execution of all contracts. The GCF may reject any proposal put forward by Tenderers, or where applicable, terminate their contract, if it is determined that they have engaged in corrupt, fraudulent, coercive, collusive or other prohibited practices.

12. Conflict of Interest

In their proposal, Tenderers must: (i) confirm that, based on their current best knowledge, there are no real or potential conflicts of interest involved in rendering Services for the GCF, and (ii) set out their policy on dealing with conflicts of interest should these arise.

13. Confidentiality

Information relating to the evaluation of proposals and recommendations concerning selection of Firms will not be disclosed to Firms that submitted proposals.



ANNEX 1 – TERMS OF REFERENCE

Implementation of Green Climate Fund’s Constituents Relationship Management (CRM) System and Related Processes

1 BACKGROUND AND PROJECT DESCRIPTION

1.1. Green Climate Fund’s Background

The Green Climate Fund (the “GCF” or the “Fund”) was established by Parties to the United Nations Framework Convention on Climate Change (UNFCCC) at its meeting in Cancún, Mexico, in December 2010, and formally launched in 2011 when the Governing Instrument of the Fund was adopted and approved. The GCF aims to become the main international financial institution for the delivery of climate finance in support of mitigation and adaptation activities in developing countries. The GCF is governed and supervised by a Board that has full responsibility for funding decisions. The GCF has a Secretariat with responsibility for the executive management and operations of the Fund.

Currently, the Fund’s business model relies on voluntary contributions from developed country governments that are party to the UNFCCC, as well as re-flows from its financing activities. GCF’s activities are aligned with the priorities of developing countries through the principle of country ownership, and the Fund has established a direct access modality so that national and sub-national organizations can access GCF funding directly, rather than only via international intermediaries.

The GCF relies on its expanding network of partners to support its vision through the following four critical and interlinked roles:

- a) Fostering transformative GCF projects through a country-driven approach;
- b) Strengthening GCF’s technical excellence, knowledge-sharing and knowledge generation;
- c) Enhancing GCF advocacy and branding;
- d) Contributing to GCF resource mobilization and scaling up additional finance.

These partners include, but are not limited to, the list of stakeholders included in Annex 1. These diverse partnerships enable the GCF to build on knowledge and experiences to drive systemic change that achieves climate ambitions.

To further grow, strengthen, and promote these partnerships, GCF aims to enable consistent and transparent management of information relevant to the various partnerships and its area of activities. The Constituent Relationship Management (CRM) system will enable this by providing a centralized point of information storage for contact information, relevant notes, and information from a wide range of constituents. This information will be utilized to track progress made on various exchanges and interactions, as well as generating reports to allow for improved data analysis to achieve better delivery and results.

1.2. Purpose

The objective of this project is:

- (1) To design and implement CRM-related processes to guarantee proper usage of Microsoft Dynamics 365;
- (2) To accompany GCF in uptake and engagement with the software; and
- (3) To build upon existing functionalities of Microsoft Dynamics 365 at GCF and implement customizations to increase efficiency.



1.3. Project Background

GCF is implementing Microsoft Dynamics 365 CRM with a focus on corporate areas and longer-term strategy to extend its usage across the organization. There are many Offices & Divisions working simultaneously on different engagements/activities with the same constituents, and communication and exchanges happen simultaneously at several organizational layers.

At this stage, GCF will use the CRM system to improve the activities mainly in the following processes:

- **Partnerships and Communication:** these processes need to use the CRM to obtain insights to prepare speeches and communications. They also track and manage relationships as well as action plans.
- **Outreach and Replenishment:** the results of activities held by these teams – such as partnership mapping, background research, tracking partnership relations, prepare and organize targeted partnership and outreach activities, horizon scanning of and monitoring of media and messaging – are currently kept in systems (such as the contributor profile) that were not built for relationship management activities. This creates operational difficulties and MS Excel is also frequently used to manage information.
- **Reporting for Board and SMT:** control the exchange of information related to information requests received by the secretariat, related to the production of reports and related to the presentation of the information requested.

1.4. CRM Features Required

The expected scope of the CRM solution is as follows:

a) Relationships Maps

- Centralized base of contacts, including detailed information on the contacts relationship with other constituents
- Manage the network of relationships amongst constituents and GCF staff.
- Further information on the contact, such as: which initiatives is the contact related to (industry associations, platforms), and where this constituent stands regarding climate change initiatives.

b) Interactions with external stakeholders

- Centralized base for registering the interactions with constituents, allowing for interaction traceability and visibility (360 view): who, when, why, results and action plans. This includes messages, phone calls, meetings, and e-mails.
- When looking at a profile, the user should see all activities they have been invited to and have attended or not attended.
- System can detect call made to phone number tagged to contact and log it into the system (caller id).
- Assign actions to the responsible for the task in the Secretariat. Send automatic message to this person.
- Sending of automatic alerts for predefined internal stakeholders whenever a profile is updated in the system.
- When manual records are included in the system, template guides should be available to help the responsible user on what is important to note about that interaction.
- Quality assurance of communication sent to stakeholder through checkpoints and checklists (workflow)
- Templates for standard documents and communications



- Spelling checks for names (as a tag connected to the contact database)

c) Workflow management

- Workflows with Service Level Agreements (SLAs) by step
- Trigger workflow to define who is responsible for the answer
- Trigger workflow for answering and archiving
- Automatic alerts for deadlines
- Automatic alerts for milestones in the workflow
- Action call for the next one in the workflow when an activity is completed
- Check if pre-determined requisites of one step in the workflow were achieved

d) CRM analytics

- Reports on constituent activities
- Reports on CRM utilization

2.0 TECHNICAL REQUIREMENTS

2.1. *Master data management*

The selected vendor shall provide counseling for the Secretariat on the definition of processes for master data management.

2.2 *Data cleaning*

The scope of the project includes gathering all the data currently kept on excel spreadsheets, word files or other programs, identifying duplicate data, standardizing, and cleaning this data and migrating it into the CRM solution.

2.3 *Data integration*

Information and data must flow from CRM to other systems as well as from other systems to CRM. Data integration is in the scope of this RFP.

2.4 *Personalized/classified access control by user profile*

The Secretariat deals with confidential information and contacts. These contacts, as well as the information gathered from them, are strategic and accessible only by designated people. Access to information like constituent's contact information, constituent's relationship maps, interactions held with constituents, and the results of these interactions, should all have access conditioned to user's profile.

2.5 *Security & Compliance*

The solution must provide group-based security access/permissions.

The accesses and actions performed by users must be registered and made available in the user's activity history format. It should also allow access to information by filtering by user, time, entity, browser, file location, types of actions, module, what was changed, and other relevant information identified during the project.

The solution must comply with the General Data Protection Laws (GDPL), being necessary to ensure the framework, either in the form of documents or certificates.

3.0 LICENSE PURCHASE

Licenses will be purchased directly by the Secretariat.



The timeline of purchase and the profiles to be purchased will rely on the recommendations obtained with the implementation partner during the project.

4.0 SCOPE OF THE SERVICES

The services shall include:

- Process design, project management and change management:
 - The design of CRM-related processes;
 - The definition of Roles & Responsibilities for the processes designed;
 - Capacity building activities for the new processes designed;
 - Change management activities to engage key users;
 - Change management activities to engage other organizational stakeholders;
 - Project management routines;

- System customization:
 - Microsoft Dynamics 365 configuration, testing and stabilization;
 - Data and document management including Microsoft Sharepoint integration;
 - Enhancement of visualizations including relationship maps and reports;
 - Key user trainings aimed at capacity building for software usage.

Any additional fees that might be included to the final price depending on the number of users, number of workflows, or on the features activated, must be clearly stated in your proposal.

4.1 Documentation

The technical solution must be documented and supported, with easy-to-use procedures for each process and/or role, including short video tutorials. The documentation must include the workflow of activities, define clear roles and responsibilities, and overall execution instructions.

4.2 Work phases

Project execution should follow defined work phases, with deliverables defined in the next section:



Phase 1 – Inception: Kickoff meeting and workplan alignment. Process design and planning.

Phase 2 – Development: Configure the system, develop necessary customization, and design related processes.

Phase 3 – Implementation: Execute tests and capacity building activities. The end of this phase is marked by the system Go Live.

Phase 4 – Hyper Care: Stabilization of the system and execution of the necessary adjustments.

5.0 DELIVERABLES

Work Phase	Deliverables
Inception	<ul style="list-style-type: none"> • Detailed Workplan • Stakeholder mapping • Process template

Work Phase	Deliverables
	<ul style="list-style-type: none"> • Risk management template • Schedule for project management routines (workgroup status meetings and executive status meetings) • Project governance team definition • Future system architecture • System configuration proposal • Activity-workflow for CRM-related processes • Roles and responsibilities (R&R) for CRM-related processes • Activity-workflow for master data processes • Roles and responsibilities for master data processes • Updated communication & change management plan
Development	<ul style="list-style-type: none"> • Development of the necessary customization • Activity-workflow for CRM-related processes, updated accordingly to the configuration executed • Activity-workflow for master data processes, updated accordingly to the configuration executed • Updated R&R for CRM-related processes and master data processes • Capacity building calendar • Communication preparation
Implementation	<ul style="list-style-type: none"> • Testing and system adjustments • Training material for key users, system administrators, system operators and other technical users • Training sessions execution • Capacity building activities organized • Communication released • Additional capacity building material produced (beyond key user training) • Training sessions execution • Updated process documentation • Readiness evaluation for processes
Hyper care	<ul style="list-style-type: none"> • Key user technical support • System configuration adjustments • Process support • Process documentation adjustments • Additional trainings, as needed

The Firm will review, improve, and complete all deliverables based on feedback and clearance from the GCF Project Board to proceed to the next phase. The Firm is responsible for seeking clearance on deliverables to the GCF. Only after confirmation from the Project Board, the Firm will start a new phase of work.

Deliverables will be paid only after the Project Board involved with the implementation certifies that the Services were evaluated and found to have been performed or provided in accordance with the terms of reference.



The activities and deliverables of each phase are subject to flexible modification and change based on the findings of the previous phases. The Firm should update or propose a thought through list of activities and associated deliverables for each phase. The activities listed above are not exhaustive and should be used as guidance.

6.0 TIMELINE (Tentative dates)

The envisioned start date is 16 May 2022. Development and implementation shall be completed by 30 June 2022, with a suggested duration of two weeks for each phase.

The hyper care period shall include continued support until the end of 2022 to GCF teams using the CRM system.

A detailed timeline shall be provided in the Technical Proposal.



Annex 2-A

Requirements for Firms' Proposals - Technical Proposal

The Technical Proposal will be submitted in a separate file and will address all aspects of the Terms of Reference. The Technical Proposal shall have all the necessary details in response to the Terms of Reference and the Tenderer shall fill in the technical Forms (TECH Forms) which follow in this annex, and which must be filled in accordingly.

The Technical Proposal **MUST NOT** contain any pricing information. Technical proposals which contain pricing information will be disqualified.



TECH Forms

Form TECH-1: Technical Proposal Submission Form

[Location, Date]

To: [Name and address of Client]

To whom it may concern:

We, the undersigned, offer to provide the consulting services for [Insert title of assignment] in accordance with your Request for Proposal dated [Insert date] and our Proposal. We are hereby submitting our Proposal, which includes this Technical Proposal, and a Financial Proposal.

We are submitting our Proposal in association with: [Insert a list with full Name and address of each associated Consultant if submitting as an association, if applicable]

We hereby declare that all the information and statements made in this Proposal are true and accept that any misinterpretation contained in it may lead to our disqualification.

If negotiations are held during the period of validity of the Proposal, i.e., before the date indicated in paragraph reference 2.8 of the RFP Letter, we undertake to negotiate on the basis of the proposed staff, methodology and approach. Our Proposal is binding upon us and subject to the modifications resulting from Contract negotiations.

We undertake, if our Proposal is accepted, to initiate the consulting services related to the assignment.

We understand you are not bound to accept any Proposal you receive.

We remain,

Yours sincerely,

Authorized Signature [In full and initials]: _____

Name and Title of Signatory: _____

Name of Firm: _____

Address: _____



Form TECH-2: Firm's Organization and Experience

A - Organisation

[Provide here a brief (two pages) description of the background and organization of your firm/entity and each associate for this assignment.]

B - Experience

[Using the format below, provide information on each assignment for which your firm, and each associate for this assignment, was legally contracted either individually as a corporate entity or as one of the major companies within an association, for carrying out consulting services similar to the ones requested under this assignment. Use not more than 20 pages making relevant examples of assignments in the areas of work identified in the terms of reference in Annex 1]

Assignment name:	Approx. value of the contract (in current US\$ or Euro):
Country: Location within country:	Duration of assignment (months):
Name of Client:	Total N° of staff-months of the assignment:
Address:	Approx. value of the services provided by your Firm under the contract (in current US\$ or Euro):
Start date (month/year): Completion date (month/year):	N° of professional staff-months provided by associated Consultants:
Name of associated Consultants, if any:	Name of senior professional staff of your Firm involved and functions performed (indicate most significant profiles such as Project Director/Coordinator, Team Leader):
Narrative description of Project:	
Description of actual services provided by your staff within the assignment:	

Firm's Name: _____



GREEN
CLIMATE
FUND

Form TECH-3: Comments and Suggestions on the Terms of Reference and Counterpart's Staff and Facilities to be provided by the GCF

On the Terms of Reference

Present and justify any modifications or improvements to the Terms of Reference you are proposing to improve performance in carrying out the assignment (such as deleting some activity you consider unnecessary, adding another, or suggesting a different phasing of the activities). [Such suggestions should be concise and to the point and incorporated in your Proposal.]



Form TECH-4:

Description of Approach, Methodology and Work Plan for Performing the Assignment

Technical approach, methodology and work plan are key components of the Technical Proposal. You are suggested to present your Technical Proposal (Not more than 40 pages, inclusive of charts and diagrams) divided into the following three chapters:

- a) Technical Approach and Methodology,
 - b) Work Plan, and
 - c) Organization and Staffing,
- a) Technical Approach and Methodology. In this chapter you should explain your understanding of the objectives of the assignment, approach to the services, methodology for carrying out the activities and obtaining the expected output, and the degree of detail of such output. You should highlight the problems being addressed and their importance and explain the technical approach you would adopt to address them. You should also explain the methodologies you propose to adopt and highlight the compatibility of those methodologies with the proposed approach.
 - b) Work Plan. In this chapter you should propose the main activities of the assignment, their content and duration, phasing and interrelations, milestones (including interim approvals by the Client), and delivery dates of the reports. The proposed work plan should be consistent with the technical approach and methodology, showing understanding of the Terms of Reference and ability to translate them into a feasible working plan. A list of the final documents, including reports, drawings, and tables to be delivered as final output, should be included here. The work plan should be consistent with the Work Schedule of Form TECH-8.
 - c) Organization and Staffing. In this chapter you should propose the structure and composition of your team. You should list the main disciplines of the assignment, the key expert responsible, and proposed technical and support staff.]



**GREEN
CLIMATE
FUND**

Form TECH-5: Team Composition and Task Assignments

Professional Staffs and other Experts				
Name of Staff	Firm	Area of Expertise	Position Assigned	Task Assigned



Form TECH-6: Curriculum Vitae (CV) for Proposed Staff Members/Experts

1. **Proposed Position** [only one candidate shall be nominated for each position]: _____
2. **Name of Firm** [Insert Name of Firm proposing the staff]: _____

3. **Name of Staff** [Insert full Name]: _____
4. **Date of Birth:** _____ **Nationality:** _____
5. **Education** [Indicate college/university and other specialized education of staff member, giving names of institutions, degrees obtained, and dates of obtainment]: _____

6. **Membership of Professional Associations:** _____

7. **Other Training** [Indicate significant training since degrees under 5 - Education were obtained]: _____

8. **Countries of Work Experience:** [List countries where the staff has worked in the last ten years]: _____

9. **Languages** [For each language indicate proficiency: fluent, good, fair, or poor in speaking, reading, and writing]: _____

10. **Employment Record** [Starting with present position, list in reverse order every employment held by staff member since graduation, giving for each employment (see format here below): dates of employment, Name of employing organization, positions held.]:

From [Year]: _____ To [Year]: _____

Employer: _____

Positions held: _____



<p>11. Detailed Tasks Assigned</p> <p>[List all tasks to be performed under this assignment]</p>	<p>12. Work Undertaken that Best Illustrates Capability to Handle the Tasks Assigned</p> <p>[Among the assignments in which the staff has been involved, indicate the following information for those assignments that best illustrate staff capability to handle the tasks listed under point 11.]</p> <p>Name of assignment or project: _____</p> <p>Year: _____</p> <p>Location: _____</p> <p>Client: _____</p> <p>Main project features: _____</p> <p>Positions held: _____</p> <p>Activities performed: _____</p>
--	---

13. Certification:

I, the undersigned, certify that to the best of my knowledge and belief, this CV correctly describes myself, my qualifications, and my experience. I understand that any wilful misstatement described herein may lead to my disqualification or dismissal, if engaged.

_____ Date: _____
[Signature of the staff member or an authorized representative of the staff] Day/Month/Year

Full Name of the authorized representative: _____



Form TECH-7: Staffing Schedule¹

	Name of Staff	Staff input (in the form of a bar chart) ²							Total staff-week input
		1	2	3	4	5	6	7	Total
1									
2									
3									
n									
Grand Total									

- 1 For Professional Staff the input should be indicated individually; for Support Staff it should be indicated by category (e.g.: draftsmen, clerical staff, etc.).
- 2 Weeks are counted from the start of the assignment. For each staff indicate separately staff input.

Form TECH-8 Work Schedule

N°	Activity ¹	Weeks ²						
		1	2	3	4	5	6	7
1								
2								
3								
4								
n								

- 1 Indicate all main activities of the assignment, including delivery of reports (e.g.: inception, interim, and final reports), and other benchmarks such as Client approvals. For phased assignments indicate activities, delivery of reports, and benchmarks separately for each phase.
- 2 Duration of activities shall be indicated in the form of a bar chart.

Annex 2-B

Requirements for Firms' Proposals - Financial Proposal

B. Financial Proposal

The Tenderer must prepare and submit the Financial Proposal in a separate file from the Technical Proposal.

The Financial Proposal shall include the taxes where applicable³, and the applicable taxes shall be specified.

The Financial Proposal must also summaries the total consultancy fee and the breakdown covering the lump sum amount to determine the financial score and contract price. Financial Proposal Standard Forms (FIN Forms) shall be used to present the Financial Proposal.

IMPORTANT:

The Financial Proposal **MUST** be password protected. The authorized procurement officer will contact the Tenderers that pass the qualifying technical score for the password to open the Financial Proposal. Tenderers should **NOT** send the password to the financial proposal until they are requested to do so by the procurement officer. Financial Proposals that are submitted without password protection may be rejected for non-compliance.

³ (a) Under Article 10 of the Headquarters Agreement, the property of the Green Climate Fund ("Fund"), including the property of any offices, subsidiary bodies or facilities established by the Fund, the Fund's operations and transactions, and any property of the Fund in transit to or from the Headquarters, are:

- (i) Exempt from all direct taxes, except those which are, in fact, no more than charges for public utility services;
- (ii) Exempt from all indirect taxes, including any value-added tax and/or other similar tax, and excise duties levied on important purchases of goods and services for official purposes; and
- (iii) Exempt from customs duties, prohibitions and restrictions on imports and exports in respect of articles of any kind imported or exported by the Fund for its official use, except for prohibitions and restrictions on imports or exports relating to health and safety.

(b) under bilateral agreements concluded between the GCF and certain countries, the GCF may be exempt from all taxation and from all customs duties, and from any obligation for the payment, withholding or collection of any tax or duty.



FINANCIAL PROPOSAL Forms

Form FIN-1: Financial Proposal Submission Form

[Location, Date]

To: [Name and address of Client]

To whom it may concern:

We, the undersigned, offer to provide the consulting services for [Insert title of assignment] in accordance with your Request for Proposal dated [Insert date] and our Technical Proposal. Our attached Financial Proposal is for the sum of [Insert amount(s) in words and figures¹].

Our Financial Proposal shall be binding upon us subject to the modifications resulting from Contract negotiations, up to the expiration of the validity period of the Proposal.

We understand you are not bound to accept any Proposal you receive.

We remain,

Yours sincerely,

Authorized Signature [In full and initials]: _____

Name and Title of Signatory: _____

Name of Firm: _____

Address: _____

1 Amount must coincide with the ones indicated under Total Cost of Financial proposal in Form FIN-2.

Form FIN-2: Summary of Costs

A. Total Cost of Financial Proposal

<i>Item</i>	<i>Costs</i>
	<i>USD</i>
Total Cost of Financial Proposal ¹	

¹Indicate the total cost, net of local taxes, to be paid by GCF in each currency

B. Breakdown of Fees and Expenses⁴ per Cost Component

Description	A. Unit of measure	B. Total Period of Contract (in working days)	C. Daily Staff Rate (in USD)	Total Cost for the Period (B x C) (in USD)
I. Remuneration Costs				
Team Leader (Senior Consultant)	<i>Working day</i>			
Consultant	<i>Working day</i>			
Associate Consultant	<i>Working day</i>			
Other staffs (if any)	<i>Working day</i>			
II. Other Costs (if any)				
TOTAL (Total Cost of Financial Proposal)				USD

C. Breakdown of Fees and Expenses per Deliverables

SN	Deliverables <i>[list them as referred to in the TOR]</i>	Percentage of Total Price	Price (Lump Sum, All-Inclusive)
1	Deliverable 1		
2	Deliverable 2		
3	Deliverable 3		
	TOTAL (Total Cost of Financial Proposal)	100%	USD

⁴ Do not include travel costs in the Financial Proposal. The GCF may either arrange for travel (If air transport is needed) when the consultants are required to be on-site or the GCF may reimburse the travel costs upon presentation of relevant receipts. Business class ticket is applicable for 8 hours or more travel time. Daily subsistence allowance to cover for meals and accommodation will be based on the prevailing UN DSA (United Nations' Daily Subsistence Allowance) rates.



Form FIN-3: Breakdown of Remuneration¹ or Price List for Experts

(Information provided in this form will be used to establish cost of future work/services or payments to the Firm for possible future work/services requested by the GCF)

Name ²	Position ³ or Title	Daily Staff Rate ⁴

- 1 – Form FIN-3 shall be filled in for the same Professional and Support Staff listed in Form TECH-7; You can also list other proposed experts for future work/services required by GCF.
- 2 – Professional Staff shall be indicated individually; Support Staff shall be indicated per category (e.g., technician, draftsmen, clerical staff).
- 3 – Positions of Professional Staff shall coincide with the proposed experts for the hypothetical project; You can also list other proposed experts for future work/services requested by GCF.
- 4 – Daily Staff Rates shall be firm and fixed during the duration of the future Contract.

Annex 3 - Evaluation Criteria

A. Evaluation and Comparison of Proposals

1. The proposals will be evaluated in a three-stage procedure, starting with administrative compliance to ensure the proposals includes all necessary required documents and is duly signed by the authorized representative. Evaluation of the technical proposal will follow and will be completed prior to any financial proposal being opened and evaluated. The financial proposal will be considered only if the submissions fulfil the minimum technical requirements.

B. Acceptance of Submissions

2. All proposers are expected to adhere to the requirements for submitting a proposal. Any proposals that fail to comply will be disqualified from further consideration as part of this evaluation. In particular:
 - A brief description, including ownership details, date and place of incorporation of the firm, objectives of the firm, partnerships, qualifications, certificates, etc.;
 - Full compliance with the formal requirements for submitting a proposal
 - Submission of all requested documentation
 - Acceptance of the GCF Model contract – Where the proposer notes issues, these must be raised as part of the technical proposal for consideration during evaluation
3. The Technical Proposal shall include:
 - A brief description of the organizational strengths and qualifications including demonstrated experience supported by references of similar assignments
 - A detailed approach and methodology with timeline to accomplish the scope of work and the outcomes.
 - Team composition including team members and their qualification.

C. Evaluation of Technical Proposal

4. A reviewing committee shall be established to evaluate each technical proposal. The technical proposal is evaluated individually on the basis of its responsiveness to the technical requirements and will be assessed and scored according to the evaluation criteria below and as per scores in the table.

Evaluation Criteria

	Criteria	Sub-score	Score
1	Expertise of Firm /Organization submitting Proposal		30
1.1	Demonstrated experience of agile projects and capable of providing relationship management solutions	10	
1.2	Demonstrated track record of recent and successful work in providing consultancy and process support for the design of institutional information platforms and solutions for decision-making	10	
1.3	Proven track record of successfully performing similar assignments with international public, private and multilateral organizations (using adequate approaches, techniques and self-developed methodologies and tools)	7	



1.4	Organization's commitment to sustainability - demonstrates its commitment to embed sustainability into its own operations (defined by social, environmental, and economic considerations)	3	
2	Technical approach and methodology		40
2.1	Assessment of the proposed approach and methodology to achieve the objectives of the assignment	15	
2.2	Detailed timeline and work plan with interim milestones	5	
2.3	Is the proposed the structure and composition of the team, including the list of main disciplines of the assignment, the key expert responsible, and proposed technical and support staff sufficient for the project?	10	
2.4	RACI matrix (Responsible, Accountable, Consulted, Informed)	5	
2.5	Demonstrate how you plan to integrate sustainability measures in the execution of the contract to provide goods or services	5	
3	Personnel		30
3.1.	Team Leader	15	
3.1.1	Master's degree or higher degree in Computer Science, Information Technology or related fields	5	
3.1.2	Substantial experience in leading CRM projects for complex sales (e.g. multinational or government organizations)	10	
3.2	Senior IT Specialist	10	
3.2.1	Master's degree in Computer Science, Information Technology or related fields	3	
3.2.2	Minimum of 5-year experience in conducting similar assignments (development and customization of CRM systems and database solutions)	7	
3.3	CRM Specialist	5	
3.3.1	Master's degree in Business, Marketing, Computer Science or related field	2	
3.3.1	Minimum of 3-year experience in CRM systems for complex sales (e.g. multinational or government organizations)	3	
	Total		100

Technical proposals that score at least 75 points out of 100 will be considered as qualified for the review of financial proposal. Any proposal less than that will be disqualified from proceeding to the next step and its financial proposal shall be returned unopened following the award of the contract.

D. Evaluation of Financial Proposal

The financial proposal of all proposers which have attained the minimum score in the technical evaluation will be evaluated subsequently. The lowest evaluated Financial Proposal (Fm) is given the maximum financial score (Sf) of 100. The formula for determining the financial scores (Sf) of all other Proposals is calculated as following:

$Sf = 100 \times Fm / F$, in which "Sf" is the financial score, "Fm" is the lowest price, and "F" is the price of the proposal under consideration.

E. Consolidated evaluation

The weights given to the Technical (T) and Financial (P) Proposals are:

T = 0.80, and P = 0.20



Proposals will be ranked according to their combined technical (S_t) and financial (S_f) scores using the weights (T = the weight given to the Technical Proposal; P = the weight given to the Financial Proposal; $T + P = 1$) as following: $S = S_t \times T\% + S_f \times P\%$.

The firm achieving the highest combined technical and financial score will be invited for contract negotiations.

F. Award

The Award will be made to the responsive proposer who achieves the highest combined technical and financial score, following negotiation of an acceptable contract. GCF reserves the right to conduct negotiations with the Proposer regarding the contents of their offer. The award will be in effect only after acceptance by the selected proposer of the terms and conditions and the technical requirements.



Annex 4 - Company Profile Form

Please respond to all questions.

Company Details - Vendor's Name

Name:

General Information

Primary contact for sales/client services	
Address	
	Postal Code: Country:
Telephone:	Fax:
E-mail:	Web site:
Parent company, if any	
Subsidiaries, Associates, and/or Overseas Rep(s), if any	
Year established	
Registration Number	
Type of organization	Public enterprise () Private company () Organization sponsored (assisted by Government) () Other (please specify): ()
Type of Business	Manufacturer () Retailer () Authorized Agent () Consulting Company () Other (please specify): ()
Summary of main business activities	
No. of employees (by location)	
Staff turnover rate	
In-house working language (s)	
Bank Name: Bank Address: Account Holder: Account Number: IBAN: SWIFT:	

Prior experience with international organizations

List contracts with international organizations in the last three years BRIEFLY list recent contracts that used relevant tools, technologies, and techniques: Attach additional sheets if necessary.
1
2
3

Environmental Policy

Does your company have a written statement of its environmental policy?



**GREEN
CLIMATE
FUND**

YES () Please attach copy

NO ()

Contract disputes

List any disputes your company has been involved in over the last three years

References

List suitable reference projects and contacts.

What options would there be for a site visit to a reference project and/or the vendor's site?

1

2

3

Partners

If this is a part bid, list relevant recent experience of working with partners.

Are there already formal or informal preferred partnership agreements in place?

1

2

3

Conflict of interest

Are there any likely circumstances or contracts in place that may introduce a conflict of interest with the parties to this contract? If so, explain how this will be mitigated

1

2

Certification

I, the undersigned, confirm that the information provided in this annex is correct. In the event of changes, details will be provided.

Name: _____

Title: _____

Signature: _____

Date: _____



Annex 5 Acknowledgement Letter

To GCF Procurement Unit,

We, the undersigned, acknowledge receipt of your Request for Proposal (RFP) No. **2022/011 for Implementation of GCF's CRM System and related processes dated 19 April 2022**, and hereby confirm that we:

INTEND DO NOT INTEND

to submit a proposal to the Secretariat of Green Climate Fund (GCF) by the deadline date of **Monday, 02 May 2022 @ 18:00 hours Korean Time**.

We acknowledge that this RFP is confidential and proprietary to the GCF and contains privileged information.

Name of Authorized Representative: _____

Signature: _____

Title: _____

Name and Address of Company/firm: _____

Telephone: _____

Facsimile: _____

If you do not intend to submit a proposal to the GCF, please indicate the reason:

- We do not have the capacity to submit a proposal at this time.
- We cannot meet the requirements for this RFP.
- We do not think we can make a competitive offer at this time.
- Other (please specify): _____

Kindly return this acknowledgement letter immediately via e-mail to procurement@gcfund.org and copy to hngau@gcfund.org

NOTE: Due to current security arrangements, your authorized representative must present a completed copy of this letter to observe the public opening procedure.

Annex 6 - Timeline

The Green Climate Fund shall follow the timeline below for this RFP. Any changes to this timeline shall be posted on the GCF website. Please note that the target dates may be adjusted.

Nr.	Event	Responsible Party	Tentative Date (and time, KST*)
1	Issuance of RFP	GCF	19 April 2022
2	Last day to send completed Acknowledgement Letter of RFP receipt	Tenderer	22 April 2022
3	Last date for requests for clarifications of RFP	Tenderer	26 April 2022
4	Last date for GCF to reply to questions received	GCF	28 May 2022
5	Date by which proposals must be received in South Korea by GCF (Closing Date)	Tenderer	02 May 2022 at 18.00 hours KST
6	Opening & Distribution of Technical Proposals	GCF	03 May 2022 at 10.00 hours KST
7	Award/Signing of Contract	GCF/Tenderer	16 May 2022
8	CRM Implementation to be completed	Tenderer	30 June 2022

* KST: Korean Standard Time (Seoul Time)



GREEN
CLIMATE
FUND

Annex 7
GCF Model Contract

(Attached as a separate document, or will be provided upon request)

By submitting a proposal to this RFP, the Tenderers are considered to have carefully reviewed the GCF Model Contract and be in agreement with all its terms and conditions. Where the Tenderer has specific issues of concern, those must be raised and indicated in the Technical Proposal clearly for consideration during evaluation. Any request for amendments to the GCF Model Contract and terms and conditions must be accompanied by a detailed and compelling justification for review and consideration by GCF. It shall be noted that the request of amendments to the GCF Model Contract and terms and conditions may negatively affect the evaluation of the proposal and, in some cases, where such amendments are incompatible with GCF's binding policies and rules, may prejudice the final award.

NB: For this particular contract, the Performance Standards (Clause 9), Insurance (Clause 10), Performance Security (Clause 11), and Deductions Clauses (Clause 12) of the Special Conditions of Contract (SCC) shall not be applicable.

*Note: The Board adopted at the recent meeting a new policy on SEAH (Sexual Exploitation, Sexual Abuse, and Sexual Harassment) and therefore the GCF is required to include new provisions in the General Conditions of Contract. While the specific wording is yet to be formulated, the eventual contract shall need to include such new provisions.