



Request for Proposals

Title: Financial Strengthening of Key Value Chain Actors for SLV Activity

RFP No: USAID-SLV-FY22-003

Date of Issuance: May 4, 2022

1. Background

Conservation International México A.C. (hereinafter referred to as “Conservation International México”), is issuing a Request for Proposals (RFP) for Financial Strengthening of Key Value Chain. The attached RFP contains all the necessary information for interested Offerors.

Conservation International Mexico (CI Mexico) is a non-profit organization that since 1990 has supported the development of a healthy and sustainable economy, based on the recognition and conservation of nature for human well-being. Progress has been achieved by linking public policies at different decision levels and by integrating various actions between organizations, government agencies and academic institutions that contribute to the conservation of the country's environmental services.

The Sustainable Landscape Ventures (SLV) Activity is a five-year, USD \$10 million-dollar project funded by the United States Agency for International Development (USAID) that is being implemented by CI Mexico. The Activity will serve as a financial mechanism for existing landscape projects in the country and will be led by CI Mexico. The purpose of the Activity is to develop sustainable and inclusive value chains at scale in four landscapes. The economic activities promoted must be market-driven and investor-ready. It aims to consolidate long-term partnerships among small-scale producers, investors, and buyers in Mexico in sustainable and inclusive value chains.

2. Project Overview

The SLV Activity is a 5-year, US\$10 million-dollar project funded by USAID being implemented by CI Mexico with the primary objective of developing a financial mechanism for existing landscape projects in the country. SLV aims to create sustainable and inclusive value chains at a market-driven and investor-ready scale in three landscapes. CI will lead this project in collaboration with two consortium partners. SLV aims to consolidate long-term partnerships in sustainable and inclusive value chains with small producers, investors, and buyers in Mexico.

The project will strengthen cooperatives, producer organizations, associations, and small and medium enterprises (SMEs) to be market and loan ready. This will allow them to be presented to investors and buyers through the Blended Finance Engine (BFE); which is a coordination

mechanism bringing together investors to look at potential investment opportunities along the SLV's prioritized value chain actors. The BFE mechanism supports the management decisions of the project and third parties involved, meets the demand for information from donors, and facilitates the systematization and evaluation of the potential investment in all its phases.

Financial Strengthening of Key Value Chain Actors for SLV Activity

General objective

Provide tailored technical assistance, focusing on financial management and investment-readiness to cooperatives, producer organizations, associations, and/or SMEs participating in the landscape initiatives.

Specific objectives

1. Identify and analyze the needs and gaps of producer organizations, cooperatives, and/or SMEs in business operations, production costs and incomes, financial break-even point, financial statements, accounting, financial management, commercialization, taxes, and debt management.
2. Formulate and implement a tailored strategy to close gaps and cover the needs identified by producer organizations, cooperatives, and SMEs.

Key Tasks

- Identify and analyze the gaps and needs of SLV selected cooperatives, producer organizations, associations, and SMEs in business operations, production costs and incomes, financial break-even point, financial statements, accounting, financial management, commercialization, taxes, and debt management.
- Develop and implement a strategy to minimize the gaps and identified of selected cooperatives, producer organizations, associations, and SMEs in the 3 target SLV landscapes.
- Establish a monitoring and evaluation system to follow-up the learning of the selected cooperatives, producer organizations, associations, and SMEs.

3. Scope of Work, Deliverables and Deliverables Schedule

- Deliverables and Deliverable Schedule - See Terms of Reference as Attachment 1

4. Submission Details

- a. Deadline. Proposals must be received no later than **May 25, 2022, at 11:59PM EDT (UTC-03:59)**. Late submissions will not be accepted. Proposals must be submitted

via email to slvproveedores@conservation.org. All proposals are to be submitted following the guidelines listed in this RFP.

- b. Clarifications. Questions may be submitted to slvproveedores@conservation.org by the specified date and time in the timeline below. The subject of the email must contain the RFP number and title of the RFP. CI will respond in writing to submitted clarifications by the date specified in the timeline below. Responses to questions that may be of common interest to all bidders will be posted to the CI website and/or communicated via email.
- c. Amendments. If at any time prior to the deadline for submission of proposals, CI may, for any reason, modify the RFP documents by amendment which will be posted to the CI website and/or communicated via email.

5. Required experience and track record

The technical proposal must include confirmation that the candidate has work experience in:

- Considerable experience working in complex multi-stakeholder and interinstitutional relationships.
- Experience in the design and implementation of successful financial strengthening training programs for enterprises including cooperatives.
- Experience in working with organizations to identify needs and propose training interventions especially in the areas of financial management.
- Proven ability to deliver and monitor training programs and adapt trainings as needed to fit the audience.

6. Proposal Documents to Include

- a. Signed cover page on bidder's letterhead with the bidder's contact information
- b. Technical Proposal
 - i. Attestation of meeting Minimum Requirements Listed in Section 5.
 - ii. Implementation Methodology including:
 - Description of the work methodology.
 - Roles and responsibilities of implementation partner.
 - Roles and responsibilities of CI and estimated level of effort required (Delineation of roles between CI and implementor).
 - Standard artifacts that are generated as part of your methodology, such as use case templates and configuration/technical design documents.
 - Estimated timeline for project implementation.
 - Estimated technical-economic proposal with a budget breakdown.
 - iii. Implementation Partner Experience including

- Corporate Capabilities, Experience, Past Performance, and 2 client references. Please include descriptions of similar projects or assignments and at least two client references.
- Staffing plan and Personnel Qualifications. Please propose how the project will be staffed. Attach CVs of personnel proposed for the project that demonstrate how the team proposed meets the minimum requirements listed in section 5 (Minimum Requirements).
- Work experience (see Terms of Reference)

7. Evaluation Criteria and interview process:

- A Technical Evaluation Committee formed by SLV partners and CI staff will make a technical evaluation of the proposals received, which will be ranked based on the evaluation criteria based on the RfP and ToR.
- A Financial Evaluation Committee formed by CI staff will make a financial evaluation of the proposals received, which will be ranked based on the evaluation criteria based on the RfP and ToR.
- The top 2 ranked proposals will be invited for a virtual interview and proposal presentation, to take place between 30 May – 1 June 2022.
- Based on the sum of the Technical and Financial Evaluation, the winner will be announced on June 10, 2022.

In evaluating proposals, CI will seek the best value for money considering the merits of the technical and costs proposals.

Following is an indicative and synthetized evaluation criteria to be used:

Evaluation Criteria	Possible points
I. Technical proposal <ul style="list-style-type: none"> • Meets or exceeds technical requirements outlined in section 5 • Description of the work methodology • Quality of end-user experience • Customer support model • Strong references 	60
II. Work experience and management	10

<ul style="list-style-type: none"> • Considerable experience working in complex multi-stakeholder and interinstitutional relationships. • Experience in the design of technological solutions for rural development projects. • Experience in the design and implementation of successful productive, financial and environmental monitoring and management systems. • Experience in adapting products and services to market requirements. • Experience in implementing public policies, sustainable development, and/or rural development. • Strong and established track records in research-based and education organizations for knowledge share. 	
<p>III. Cost Proposal-Cost Includes (Travel, fee, charges, any other expenses)</p> <ul style="list-style-type: none"> • Cost 	10
<p>IV. Interview and presentation</p> <ul style="list-style-type: none"> • Strong presentation and sales pitch skills during the interview of those companies selected 	20

8. Proposal Timeline

RFP Issued	May 4, 2022
Clarifications submitted to CI	May 13, 2022
Clarifications provided to known bidders	May 18, 2022
Proposals Due	May 25, 2022
Interview and presentations	May 30 – June 1, 2022
Final selection	June 10, 2022
Contract Finalized	June 25, 2022
Work Begins	July 1 st , 2022

- 9. Resulting Award** CI anticipates entering into an agreement with the selected bidder by **July 1st, 2022**. The successful bidder will have to agree to enter contractual terms based on CI's standard agreements.

This RFP does not obligate CI to execute a contract, nor does it commit CI to pay any costs incurred in the preparation or submission of the proposals. Furthermore, CI reserves the right to reject any and all offers if such action is considered to be in the best interest of CI. CI will, at its sole discretion, select the winning proposal and is not obligated to share individual evaluation results.

10. Confidentiality All proprietary information provided by the bidder shall be treated as confidential and will not be shared with potential or actual applicants during the solicitation process. This includes but is not limited to price quotations, cost proposals and technical proposals. CI may, but is not obliged to, post procurement awards on its public website after the solicitation process has concluded, and the contract has been awarded. CI's evaluation results are confidential and applicant scoring will not be shared among bidders.

11. Code of Ethics All Offerors are expected to exercise the highest standards of conduct in preparing, submitting and if selected, eventually carrying out the specified work in accordance with CI's Code of Ethics and the Green Climate Fund's [Policy on Prohibited Practices](#). Conservation International's reputation derives from our commitment to our values: Integrity, Respect, Courage, Optimism, Passion and Teamwork. CI's Code of Ethics (the "Code") provides guidance to CI employees, service providers, experts, interns, and volunteers in living CI's core values, and outlines minimum standards for ethical conduct which all parties must adhere to. Any violation of the Code of Ethics, as well as concerns regarding the integrity of the procurement process and documents should be reported to CI via its Ethics Hotline at www.ci.ethicspoint.com.

12. Attachments:

Attachment 1: Terms of Reference

Attachment 2: Cost Proposal Template

Attachment 1: Terms of Reference

**Terms of Reference
Financial Strengthening of Key Value Chain Actors for SLV Activity**

Overview

Name of the project where the grant is inserted:	Sustainable Landscapes Ventures (SLV)
Title of the grant:	Financial Strengthening of Key Value Chain Actors for SLV Activity
Implementation Partner:	
Address:	
Telephone:	
Email:	
Main contact at CI:	Chief of Party
Start date:	July 2022
End date:	June 2025
Duration of the grant:	Three (3) years
Date of receipt of technical-economic proposals:	May 25, 2022
Amount:	To be agreed, according to the technical-economic proposals of the candidates. The agreed amount includes tax less withholdings, according to the law, and within a range of USD \$ 100,000 and USD \$200,000

Project Description

The SLV Activity is a 5-year, US\$10 million-dollar project funded by USAID being implemented by CI Mexico with the primary objective of developing a financial mechanism for existing landscape projects in the country. SLV aims to create sustainable and inclusive value chains at a market-driven and investor-ready scale in three landscapes. CI will lead this project in collaboration with two consortium partners. SLV aims to consolidate long-term partnerships in sustainable and inclusive value chains with small producers, investors, and buyers in Mexico.

The project will strengthen cooperatives, producer organizations, associations, and small and medium enterprises (SMEs) to be market and loan ready. This will allow them to be presented to

investors and buyers through the Blended Finance Engine (BFE); which is a coordination mechanism bringing together investors to look at potential investment opportunities along the SLV's prioritized value chain actors. The BFE mechanism supports the management decisions of the project and third parties involved, meets the demand for information from donors, and facilitates the systematization and evaluation of the potential investment in all its phases.

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Key Tasks

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- Develop and implement a strategy to minimize the gaps and identified of selected cooperatives, producer organizations, associations, and SMEs in the 3 target SLV landscapes.
- Establish a monitoring and evaluation system to follow-up the learning of the selected cooperatives, producer organizations, associations, and SMEs.

Required experience and track record

The technical proposal must include confirmation that the candidate has work experience in:

- Considerable experience working in complex multi-stakeholder and interinstitutional relationships.
- Experience in the design of technological solutions for rural development projects.
- Experience in the design and implementation of successful productive, financial and environmental monitoring and management systems.
- Experience in adapting products and services to market requirements.
- Experience in implementing public policies, sustainable development, and/or rural development.
- Strong and established track records in research-based and education organizations for knowledge share.
- Proven track record in project management.

Estimated Timeline

July 1st, 2022, until June 30, 2025.

Estimated Budget and Reporting

Within a range of USD 100,000 to USD 200,000 for the project's life. No budget figure is being suggested for the project's scope. It will be up to proponents to develop their own budget based on scope of work as advertised.

The successful partner will be expected to provide reports based on the deliverables established.

Location of Task/Applicable Trips

Tasks will also require travel to each of the selected three landscapes and availability to perform the key tasks all the markets require to deliver the project's scope successfully.

The Activity is implemented in the following three landscapes:

1. **Sierra Sur (Oaxaca)**. This Landscape includes the regions of the Sierra Sur and the Isthmus of Oaxaca.
2. **Sierra Madre (Chiapas)**. It divides the regions of the Pacific Coastal Plain and the Central Depression of Chiapas, topographically and climatically.
3. **Calakmul (Campeche)**. This Landscape is within the municipality of Calakmul, Campeche, and includes 159 localities, among them Xpujil, Zoh-Laguna, and Constitución.

Work Method

Proposed by the consultant and the SLV project. Also, the costs of travel by the offeror to the three landscapes should be included in the proposal.

Deliverables/Estimated Outputs and work schedule

Activity	Deliverables	Expected delivery date	Percentage of payment
Provide a diagnostic of the SLV selected cooperative/producer organization/association, and/or SME	Present the diagnostic and needs from the first entity in terms of in business operations, production costs and incomes, financial break-even point, financial statements, accounting, financial management, commercialization, taxes, and debt management.	Milestones will be developed as organizations/enterprises identified	Payment schedule to be developed based on the organizations/enterprises developed
Conduct training	Develop and implement a strategy to minimize the gaps and identified for the SLV selected organization	Milestones will be developed as trainings are identified	Payment schedule to be developed based on the organizations/enterprises developed

Required experience and track record

Work Experience:

- Considerable experience working in complex multi-stakeholder and interinstitutional relationships.
- Experience in the design of technological solutions for rural development projects.
- Experience in the design and implementation of successful productive, financial and environmental monitoring and management systems.
- Experience in adapting products and services to market requirements.
- Experience in implementing public policies, sustainable development, and/or rural development.
- Strong and established track records in research-based and education organizations for knowledge share.
- Proven track record in project management.

Key team members skills:

- Proven track record in managing complex multi-stakeholder and interinstitutional relationships.

- Solid track record in the agriculture sector working with strengthening organizations/enterprises in value chains such as cocoa, coffee, etc.
- Solid track record in developing and implementing training programs in the areas of business planning, financial management, forecasting, and so forth.
- Solid track record in collaborating in multi-year, multi-million complex projects with governments, public and private organizations.
- Ability to communicate clearly across diverse socio economic and cultural spectrum.
- Fluent writing and speaking in Spanish and English.

Final considerations

The potential grantee must send the technical proposal with a budget breakdown. Any information or element not included in these Terms of Reference must be presented, analyzed, agreed, and considered between CI Mexico and the potential grantee to fulfill the objective and may be raised by any of the parties using the mechanisms established between them.

Acronyms

CI	Conservation International
SLV	Sustainable Landscapes Ventures
CBE	Collective Business Entities
BFE	Blended Finance Engine
PIR	Performance Indicator Reference
USAID	United States Agency for International Development

[Attachment 2: Cost Proposal Template](#)