

**Request for Proposals**

**Title: REQUEST FOR PROPOSALS FOR TRAINING AND MENTORING COMMUNAL FARMER ENTITIES TO DEVELOP A FIVE-YEAR BUSINESS PLAN WHICH WILL ENSURE FINANCIAL SUSTAINABILITY BY THE END OF FIVE YEARS.**

**RFP No: BP1/22**

**Date of Issuance: 08 February 2022**

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**Background**

Conservation South Africa (CSA) is a local affiliate of Conservation International. CSA is committed to helping societies adopt a more sustainable approach to development, one that considers and values nature at every turn and improves human well-being through the conservation of healthy ecosystems and the goods and services they provide.

To train and mentor communal farmer entities which CSA holds conservation agreements, more or less 7 entities, to each develop a five-year business plan which will ensure the financial sustainability of these entities by the end of the five years, by:

- a) working closely with the management committee of each entity and ensure that the realities of their local natural and social environment and local economic conditions is taken well into account to develop a business plan that will work for them and is viable in their unique situation.
- b) On a two-monthly basis, provide mentoring for one year for each of the entities after training and ensure that they make progress and stay on track developing a five-year business plan.
- c) train management committees in financial and administrative procedures skills needed to operate their entity effectively.

A well-thought-out business plan which is developed for each organization's unique situation, will enable organizations to support their communal farmer members in order to improve their livelihoods, build resilience against climate change impacts and protect their natural resources.

**1. Project Overview**

**CSA has rolled out a Conservation Stewardship Program with communal livestock farmers on the Leliefontein Commonage for 12 years. Through this program, farmers' have organized, their capacity was built, their resilience against the impacts of climate change increased, erosion on rangelands were restored and pressure on the rangelands decreased through sales. Organizations which were form are at various stages of sustainability and need good business plans to ensure their ongoing operations and financial sustainability.**

**2. Scope of Work, Deliverables and Deliverables Schedule**

- Meet with the management committee of each entity in one day at a central venue over, ensuring that time is spent individually with each entity, and evaluate their current levels of skills, functionality, and sustainability. Consult with them to understand the services they deliver, their membership base, the challenges their organization experience and the opportunities they can take to become sustainable.

- Development of a training program based on the results of the evaluation.
- Training of all management committee members (it can be with all of them together) and CSA staff members, as nominated by CSA, on how to write a business plan, as well as in critical financial and administrative skills organizations like theirs need to function well. By the end of the training workshop, each entity must have an outline of their business plan
- Collaboratively map out a process of developing a business plan for each organization, including responsible persons, timeframes, and activities to be done
- Once each organization's business plan is completed, spend one day for 3 months with each of the organizations management committees to review the progress they made on writing the business plan as well as mentor them on refining and fleshing out their business plans.
- Review each entity's business plan to ensure it is realistic for their unique circumstances and, if implemented, will result in financial sustainability. Make recommendations for adjustment as needed.

### 3. Submission Details

- a. **Deadline.** Proposals must be received no later than **16:00, Friday, 25 March 2022**. Late submissions will not be accepted. Proposals must be submitted via email to [csaprocurement@conservation.org](mailto:csaprocurement@conservation.org) All proposals are to be submitted following the guidelines listed in this RFP.
- b. **Validity of bid.** 30 days from the submission deadline
- c. **Clarifications.** Questions may be submitted to [mgardiner@conservation.org](mailto:mgardiner@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. CSA 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 CSA website and/or communicated via email.
- d. **Amendments.** If at any time prior to the deadline for submission of proposals, CSA may, for any reason, modify the RFP documents by amendment which will be posted to the CSA website and/or communicated via email.

### 4. Minimum Requirements

- The service provider must be suitably qualified to undertake development of business plans with relevant knowledge, skills, preferably in the agricultural sector, and experience in developing business plans and of doing actual business
- Have a proven track record of enabling entities to develop good business plans, which entities are still in business and thriving. Must be able to provide CSA with references to this regard.
- Have experience in training and workshop facilitation, as well as mentoring
- Excellent report writing skills
- Familiarity with the Northern Cape province and rural development context in South Africa will be an advantage.
- Fluency in both spoken and written Afrikaans.

**5. Proposal Documents to Include**

- a. Signed cover page on bidder's letterhead with the bidder's contact information.
- b. Signed Representation of Transparency, Integrity, Environmental and Social Responsibility (Attachment 1)
- c. Technical Proposal.
  - i. Corporate Capabilities, Experience, Past Performance, and 3 client references. Please include descriptions of similar projects or assignments and at least three client references.
  - ii. Qualifications of Key Personnel. Please attach CVs that demonstrate how the team proposed meets the minimum requirements listed in section 5 (Minimum Requirements).
  - iii. Technical Approach, Methodology and Detailed Work Plan. The Technical Proposal should describe in detail how the bidder intends to carry out the requirements described in the Scope of Work, not exceeding 5 pages.

- 6. Evaluation Criteria** In evaluating proposals, CSA will seek the best value for money considering the merits of the technical and costs proposals. Proposals will be evaluated using the following criteria:

<b>Evaluation Criteria</b>	<b>Score (out of 100)</b>
Approach and Methodology	30%/ Max points
Planning and Implementation	20%/ Max points
Practical Experience	15%/ Max points
Personnel Expertise	20%/ Max points
Costs	15%/ Max points

**7. Proposal Timeline**

RFP Issued	8 February 2022
Clarifications submitted to CSA	22 February 2022
Clarifications provided to known bidders	28 February 2022
Complete proposals due to CSA	25 March 2022
Final selection	31 March 2022

- 8. Resulting Award** CSA anticipates entering into an agreement with the selected bidder **by 8 April 2022**. Any resulting agreement will be subject to the terms and conditions of CSA's Services Agreement. A model form of agreement can be provided upon request.

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

- 9. 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. CSA 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. CSA's evaluation results are confidential and applicant scoring will not be shared among bidders.

**10. 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 CSA's Code of Ethics. Conservation South Africa's reputation derives from our commitment to our values: Integrity, Respect, Courage, Optimism, Passion and Teamwork. CSA's Code of Ethics (the "Code") provides guidance to CSA employees, service providers, experts, interns, and volunteers in living CSA'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 CSA via its Ethics Hotline at [www.CSA.ethicspoint.com](http://www.CSA.ethicspoint.com).

**11. Attachments:**

Attachment 1: Representation of Transparency, Integrity, Environmental and Social Responsibility

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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 CSA's Code of Ethics. CSA's Code of Ethics provides guidance to CSA employees, service providers, experts, interns, and volunteers in living CSA's core values, and outlines minimum standards for ethical conduct which all parties must adhere to. Any violations of the Code of Ethics should be reported to CSA via its Ethics Hotline at [www.CSA.ethicspoint.com](http://www.CSA.ethicspoint.com).

CSA relies on the personal integrity, good judgment, and common sense of all third parties acting on behalf, or providing services to the organization, to deal with issues not expressly addressed by the Code or as noted below.

**I. With respect to CSA's Code of Ethics, we certify:**

- a. We understand and accept that CSA, its contractual partners, grantees, and other parties with whom we work are expected to commit to the highest standards of Transparency, Fairness, and Integrity in procurement.

**II. With respect to social and environmental standards, we certify:**

- a. We are committed to high standards of ethics and integrity and compliance with all applicable laws across our operations, including prohibition of actions that facilitate trafficking in persons, child labor, forced labor, sexual abuse, exploitation or harassment. We respect internationally proclaimed human rights and take no action that contributes to the infringement of human rights. We protect those who are most vulnerable to infringements of their rights and the ecosystems that sustain them.
- b. We fully respect and enforce the environmental and social standards recognized by the international community, including the fundamental conventions of International Labour Organization (ILO) and international conventions for the protection of the environment, in line with the laws and regulations applicable to the country where the contract is to be performed.

**III. With respect to our eligibility and professional conduct, we certify:**

- a. We are not and none of our affiliates [members, employees, contractors, subcontractors, and consultants] are in a state of bankruptcy, liquidation, legal settlement, termination of activity, or guilty of grave professional misconduct as determined by a regulatory body responsible for licensing and/or regulating the offeror's business
- b. We have not and will not engage in criminal or fraudulent acts. By a final judgment, we were not convicted in the last five years for offenses such as fraud or corruption, money laundering or professional misconduct.
- c. We are/were not involved in writing or recommending the scope of work for this solicitation document.
- d. We have not engaged in any collusion or price fixing with other offerors.
- e. We have not made promises, offers, or grants, directly or indirectly to any CSA employees involved in this procurement, or to any government official in relation to the contract to be performed, with the intention of unduly influencing a decision or receiving an improper advantage.

- f. We have taken no action, nor will we take any action to limit or restrict access of other companies, organizations, or individuals to participate in the competitive bidding process launched by CSA.
- g. We have fulfilled our obligations relating to the payment of social security contributions or taxes in accordance with the legal provisions of the country where the contract is to be performed.
- h. We have not provided, and will take all reasonable steps to ensure that we do not and will not knowingly provide, material support or resources to any individual or entity that commits, attempts to commit, advocates, facilitates, or participates in terrorist acts, or has committed, attempted to commit, facilitate, or participated in terrorist acts, and we are compliant with all applicable Counter-Terrorist Financing and Anti-Money Laundering laws (including USA Patriot Act and U.S. Executive Order 13224).
- i. We certify that neither we nor our directors, officers, key employees or beneficial owners are included in any list of financial or economic sanctions, debarment or suspension adopted by the United States, United Nations, the European Union, the World Bank, or General Services Administration's List of Parties Excluded from Federal Procurement or Non-procurement programs in accordance with E.O.s 12549 and 12689, "Debarment and Suspension.

Name: \_\_\_\_\_

Signature: \_\_\_\_\_

Title: \_\_\_\_\_

Date: \_\_\_\_\_

