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Request for Quotation (RFQ) – Goods or Services

Subject RFQ #:	RFQ-CATALYZE- PERU-2020-0069
RFQ Issue Date:	November 6, 2020
Terms of Reference / Specifications:	Chief Executive Officer CATALYZE Peru Executive Recruitment Services
Project	CATALYZE Peru
The Company	Palladium International LLC
Country of Performance	Peru
Closing Date and Time	November 19, 2020 5pm EST
Contact Person	Jamie Salazar
Details for Submission	Electronic submissions will be accepted at CATALYZE.Procurements@thepalladiumgroup.com

Thank you for your interest in the above procurement. As implementer for the Project, Palladium invites you to submit a quote for the Goods or Services listed below. Your quote must be valid for the Validity Period.

Please forward your quote in accordance with the Details for Submission above by the Closing Date and Time. This RFQ in no way obligates Palladium to award a contract nor does it commit Palladium to pay any cost incurred in the preparation and submission of a quote. Palladium bears no responsibility for data errors resulting from transmission or conversion processes.

I look forward to your response. If you have any queries, please do not hesitate to contact me at CATALYZE.Procurements@thepalladiumgroup.com no later than November 12 at 5 pm. Please note that this procurement is a small business set aside for US-based vendors.

Yours sincerely,

Jamie L. Salazar
Manager, Project Delivery
CATALYZE, Peru

Terms and conditions

1. Quote Conditions

By submitting a quote, potential suppliers are bound by these terms and conditions. Potential suppliers must submit offers with all details provided in English and with prices quoted in a single currency.

2. Quote Lodgement

The Company may grant extensions to the Closing Time at its discretion. The Company will not consider any quotes received after the Closing Time specified in the RFQ unless the Company determines to do so otherwise at its sole discretion.

3. Evaluation

The Company may review all quotes to confirm compliance with this RFQ and to determine the best quote in the circumstances.

4. Alterations

The Company may decline to consider a quote in which there are alterations, erasures, illegibility, ambiguity or incomplete details.

5. The Company's Rights

The Company may, at its discretion, discontinue the RFQ; decline to accept any quote; terminate, extend or vary its selection process; decline to issue any contract; seek information or negotiate with any potential supplier that has not been invited to submit a Quote; satisfy its requirement separately from the RFQ process; terminate negotiations at any time and commence negotiations with any other potential supplier; evaluate quotes as the Company sees appropriate (including with reference to information provided by the prospective supplier or from a third party); and negotiate with any one or more potential suppliers.

6. Amendments and Queries

The Company may amend, or clarify any aspect of the RFQ prior to the RFQ Closing Time by issuing an amendment to the RFQ in the same manner as the original RFQ was distributed. Such amendments or clarifications will, as far as is practicable be issued simultaneously to all parties.

Any queries regarding this RFQ should be directed to the Contact Person identified on the cover page of this RFQ.

7. Clarification

The Company may, at any time prior to execution of a contract, seek clarification or additional information from, and enter into discussions and negotiations with, any or all potential suppliers in relation to their quotes. In doing so, the Company will not allow any potential supplier to substantially tailor or amend their quote.

8. Confidentiality

In their quote, potential suppliers must identify any aspects of their quote that they consider should be kept confidential, with reasons. Potential suppliers should note that the Company will only agree to treat information as confidential in cases that it considers appropriate. In the absence of such an agreement, potential suppliers acknowledge that the Company has the right to disclose the information contained in their quote.

The potential supplier acknowledges that in the course of this RFQ, it may become acquainted with or have access to the Company's Confidential Information (including the existence and terms of this RFQ and the TOR). It agrees to maintain the confidence of the Confidential Information and to prevent its unauthorised disclosure to any other person. If the potential supplier is required to disclose Confidential Information due to a relevant law or legal proceedings, it will provide reasonable notice of such disclosure to the Company. The parties agree that this obligation applies during the RFQ and after the completion of the process.

9. Alternatives

Potential suppliers may submit quotes for alternative methods of addressing the Company's requirement described in the RFQ where the option to do so was stated in the RFQ or agreed in writing with the Company prior to the RFQ Closing Time. Potential suppliers are responsible for providing a sufficient level of detail about the alternative solution to enable its evaluation.

10. Reference Material

If the RFQ references any other materials including, but not limited to, reports, plans, drawings, samples or other reference material, the potential supplier is responsible for obtaining the referenced material and considering it in framing their quote. And provide it to the Company upon request.

11. Price Basis

Prices quoted must be provided as a fixed maximum price and show the tax exclusive price, the tax component and the tax inclusive price.

The contract price, which must include any and all taxes, supplier charges and costs, will be the maximum price payable by the Company for the Goods and/or Services.

12. Financial information

If requested by the Company, potential suppliers must be able to demonstrate their financial stability and ability to remain viable as a provider of the Goods and/or Services over the term of any agreement.

If requested by the Company, the potential supplier must promptly provide the Company with such information or documentation as the Company reasonably requires in order to evaluate the potential supplier's financial stability.

13. Referees

The Company reserves the right to contact the potential supplier's referees, or any other person, directly and without notifying the potential supplier.

14. Conflict of interest

Potential suppliers must notify the Company immediately if any actual, potential or perceived conflict of interest arises (a perceived conflict of interest is one in which a reasonable person would think that the person's judgement and/or actions are likely to be compromised, whether due to a financial or personal interest (including those of family members) in the procurement or the Company).

15. Inconsistencies

If there is inconsistency between any of the parts of the RFQ the following order of precedence shall apply:

- (a) these Terms and Conditions;
- (b) the first page of this RFQ; and
- (c) the Schedule

so that the provision in the higher ranked document will prevail to the extent of the inconsistency.

16. Collusion and Unlawful Inducements

Potential suppliers and their officers, employees, agents and advisors must not engage in any collusive, anti-competitive conduct or any other similar conduct with any other potential supplier or person or quote any unlawful inducements in relation to their quote or the RFQ process.

Potential suppliers must disclose where quotes have been compiled with the assistance of current or former the Company employees (within the previous 9 months and who was substantially involved in the design, preparation, appraisal, review, and or daily management of this activity) and should note that this may exclude their quote from consideration.

Potential suppliers warrant that they have not provided or offered any payment, gift, item, hospitality or any other benefit to the Company, its employees, consultants, agents, subcontractors (or any other person involved in the decision-making process relating to this RFQ) which could give rise to a perception of bribery or corruption in relation to the RFQ or any other dealings between the parties.

17. Jurisdiction

This RFQ shall be subject to the laws of the District of Columbia, United States of America. The language of the arbitration will be English.

The Potential Supplier and the Company will use their best efforts to settle amicably any dispute, controversy, or claim arising out of, or relating to this RFQ or the breach, termination, or invalidity thereof.

If no agreeable settlement can be found, any dispute, controversy, or claim arising out of or relating to this RFQ or the breach, termination, or invalidity thereof, shall be settled by mediation through the American Arbitration Association by filing a request for mediation with the AAA and the other party. The Parties will be bound by any arbitration award rendered as a result of such arbitration as the final adjudication of any such dispute.

Schedule - Terms of Reference

Purpose

Palladium was recently awarded an 8-year \$250 million CATALYZE Innovative Blended Finance program, funded by USAID, and under which various initiatives will be implemented across the world. CATALYZE Peru is seeking to procure the services of an executive search firm to identify a qualified candidate for the role of Chief Executive Officer, who will lead the local Peru program in Lima, Peru.

Type of Contract

Palladium intends to issue a fixed-price subcontract for the successful recruitment and hiring of a candidate. Palladium will consider multiple milestone-based or time-based payments, to be negotiated with the successful bidder.

Anticipated Contract Term

The recruitment and selection process is expected to commence in early December 2020 with an estimated completion date around March 2021.

Company Information

Palladium is a global leader in the design, development, and delivery of Positive Impact - the intentional creation of enduring social and economic value. We work with foundations, investors, corporations, governments, foundations, communities, and civil society to formulate strategies and implement solutions that generate lasting social, environmental and financial benefits.

For the past 50 years, we have been making Positive Impact possible. With a team of more than 2,500 employees operating in 90 plus countries and a global network of more than 35,000 technical experts, Palladium has improved - and is committed to continuing to improve - economies, societies and most importantly, people's lives.

CATALYZE Peru

CATALYZE is a new blended finance initiative that allows USAID to efficiently deploy sector, issue- and/or geographic-focused investment facilitation experts and implement programs to mobilize private capital to advance achievement of development objectives.

CATALYZE Peru is a 6-year initiative (three initial years plus three option years), \$30M USAID - funded program implemented by Palladium under the CATALYZE Global umbrella, with the objective of channelling significant levels of financing and investment into micro, small, medium and large businesses and financial institutions of all sizes in the nine regions of the Peruvian Amazon.

CATALYZE Peru seeks to attract private investment from financial institutions, funds, and investors via partnerships with local businesses, supply chain and anchor firms, and other Peruvian Amazon local entities by providing investment matchmaking, technical assistance, business services, investment readiness, incentives, and other support and services to the region. The combination of these services and blended finance is intended to provide Peruvian enterprises in the Amazon better access to finance and markets with which to invest in growth and productivity improvement, thereby becoming more competitive, creating jobs, and driving inclusive growth in the region.

Timeline

Questions regarding this procurement may be submitted to Palladium until November 12, 2020 at 5pm. Questions and responses will be sent to all identified bidders.

Submission deadlines will be accepted electronically until the Closing Date. Please do not contact CATALYZE team members in regard to this procurement outside of this channel of communication.

Quotes shall be valid for a period of six months. Quotes shall be considered final.

Palladium intends to issue a fixed-price subcontract in early December 2020. Provision of services shall commence immediately.

Scope of Work and Standards

The selected bidder must complete Due Diligence Questionnaire within 3 business days of notice of award.

Scope of Work. This will be a multi-stage activity, with the below as illustrative steps:

1. Kick-off meeting with Palladium Team
2. Selected bidder will review and potentially revise job description, source candidates, conduct initial screenings, provide CVs and write ups for qualified candidates on how they align with the key competencies and professional expertise required (see the **Job Description** attached).
3. Palladium will interview top candidates and provide feedback to the recruiter.
4. Recruitment firm to specify the final steps to hiring.

Any stage of this process may be repeated until the final candidate is identified and hired.

Milestones. Palladium and the successful offeror will develop a set of milestones, either time-based or activity-based, to assess progress in the recruitment process. Payment for services can be pegged to those milestones or set deliverables. These can be negotiated with Palladium before the Fixed Price Contract is signed. An illustrative deliverable table is presented below, solely as a reference on possible milestones or deliverables:

No.	Description	By date or Percentage milestone
1	Recruiter provides a minimum of xx high quality appropriate candidates, including write ups, to Palladium.	Date or Percentage
2	Recruiter completes next phases of recruitment process.	Date or Percentage
3	Recruiter provides reference checks for the top 3 candidates and collects any required forms Palladium will need to formalize hiring of the selected candidate.	Date or Percentage
4	Final phase of recruitment process.	Date or Percentage

Candidates previously contacted by Palladium may not count towards the number of candidate write ups.

Candidate Profile. The Peru Chief Executive Officer will lead the CATALYZE Peru program under the CATALYZE program umbrella. This is a Lima, Peru-based position. Candidates must be Peruvian Citizens or currently authorized to work in that country. **A full job description is attached.** An ideal candidate would be first and foremost a finance expert or entrepreneur with an understanding of the investment landscape in Peru. Knowledge of the Amazon region is also a plus. See job description for details.

Evaluation and Award Process

Palladium shall evaluate bids on a lowest price/technically acceptable basis.

Evaluation Stage 1. To meet the criteria for technical acceptance, firms must meet the following criteria, which shall be evaluated on a pass/fail basis:

Criteria	Submission Requirements
Small business	SBA certificate <i>or</i> self-certification in SAM.gov*
DUNS number	Include in company <i>profile</i> (<i>any company based in USA or elsewhere can get a DUNS number</i>)
Demonstrated Peruvian private sector senior executive recruiting experience resulting in successful placements.	Past performance write-up. Inclusion of 3-5 examples including client names (unless restricted by client confidentiality) from the past 3 years.
Substantial network in the commercial, financial, investment, or entrepreneurial sectors in Peru.	Please address in the firm's capability statement.

Reputation for timely provision of high- quality suitable candidates for executive position roles in private companies.	Name and contact information for two professional references.
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**Non-US firms are exempt from this requirement.*

Evaluation Stage 2. If these minimum criteria are met, offerors will move to the second stage, where the lowest bidder will be awarded the subcontract.

Palladium reserves the right to award under this solicitation without further negotiations. Offerors are encouraged to offer their best terms and prices with the original submission.

PROCUREMENT INTEGRITY AND ETHICS

It is Palladium's Policy that no gifts of any kind and of any value be exchanged between vendors/contractors and Palladium personnel. Discovery of the same will be grounds for disqualification of the vendor/contractor from participation in any Palladium's procurements and may result in disciplinary actions against Palladium personnel involved in such discovered transactions.

Instructions to the Offerors

The following items are required to be submitted as part of the proposal:

- Company Profile
- Quotation (as a lump sum)
- Capability Statement
- Past Performance
- Reference Information (Contact/Program Name etc)