Attachment 01 - Technical Proposal

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| RFP Number: | RFP-CATALYZE-217772-PSD-2023-0044 |
| Call date: | 31-May-2022 |
| Purpose | Call for Short Term Consultancy – Enhancing capacity of staff of selected Financial Institutions on debt restructuring, rehabilitation of stressed portfolios and new financing |
| Project | CATALYZE Sri Lanka Private Sector Development |

**SUMMARY OF REQUIRED PROPOSAL DOCUMENTS:**

|  |  |  |  |
| --- | --- | --- | --- |
| **Location** | **Description** | **Applicability & Page Limits** | |
| **Individual Offeror** | **Organizational Offeror** |
| **Technical Proposal** | | | |
| **Attachment 1** | **1. Offeror Information** | **Applicable** | **Applicable** |
| **Attachment 1** | **2. Technical skills and qualifications** | **Applicable** | **Applicable** |
|  | 2.1 Key Personnel Experience | 1 page | Up to 3 pages |
|  | 2.2 Past Performance | 2 pages | 2 pages |
|  | 2.3 Reference Information | 1 page | 1 page |
| **Attachment 1** | **3. Technical Approach & Understanding** | **Applicable** | **Applicable** |
|  | 3.1 Technical understanding and Approach | 2 pages | 2 pages |
|  | 3.2 Management Approach | 1 page | 1 page |
| **Annex A** | **Key Personnel CVs** | **Applicable**  2 pages | **Applicable**  Up to 6 pages |
|  | Offeror to included Key Personnel CVs (max 2 pages per CV) with technical proposal, labeled as **Annex A** | 2 pages | Up to 6 pages |
| **Cost Proposal** | | | |
| **Attachment 2** | **Cost Matrix** | **Applicable** | **Applicable** |
|  | Offeror to complete attached excel Cost Proposal (Deliverable table) | No limit | No limit |
| **Additional Eligibility Requirements** | | | |
| **Attachment 3** | **Palladium Due Diligence Questionnaire** | **Applicable** | **Applicable** |
|  | Offeror to complete attached Due Diligence Questionnaire | No limit | No limit |
| **Attachment 4** | **Read and understand the subcontract clauses** | **Applicable** | **Applicable** |
|  | Offeror should attach a letter of confirmation stating that they have read and understood the subcontract clauses (Attached subcontract template along with RFP) | 1 page | 1 page |
| **Annex B** | **Proof of legal registration/ability to conduct business** | **Not Applicable** | **Applicable** |
|  | Organizational Offerors must submit documentation of legal registration/ability to conduct business in their operating country, labeled as **Annex B** | N/A | No limit |

1. OFFEROR INFORMATION (INDIVIDUAL CONSULTANT OR ORGANIZATIONAL) (1 pg. max)

|  |  |
| --- | --- |
| Offeror Name |  |
| Contact person  (Same as above for individual offerors) |  |
| Telephone |  |
| Email |  |
| Address |  |
| Names of board members or organizational equivalent (organizational offerors only) |  |
| Name & title of the legal representative (organizational offerors only) |  |
| Commitment to apply for Unique Entity Identification Number within 5 days of being notified of selection | Yes  No |
| Briefly summarize you or your organization’s current business offerings and outline your decision to respond to this RFP. In other words, why are you/your firm well suited to successfully perform the requirements/tasks outlined in the RFP SOW? | |
|  | |
| Signature (bidder for individual offerors or legal representative for organizational offerors) |  |
| Date |  |

1. TECHNICAL SKILLS AND QUALIFICATIONS
   1. KEY PERSONNEL (1 pg. max per key person named)

|  |  |
| --- | --- |
| **Key Personnel #1** | |
| **Name & Position Tite** |  |
| **Summary of position roles & responsibilities** |  |
| **Education & years relevant experience** |  |
| **Summary of relevant experience** |  |

|  |  |
| --- | --- |
| **Key Personnel # 2 (Organizational Offerors Only)** | |
| **Name & Position Tite** |  |
| **Summary of position roles & responsibilities** |  |
| **Education & years relevant experience** |  |
| **Summary of relevant experience** |  |
| **Key Personnel #3 (Organizational Offerors Only)** | |
| **Name & Position Tite** |  |
| **Summary of position roles & responsibilities** |  |
| **Education & years relevant experience** |  |
| **Summary of relevant experience** |  |

**Include Key Personnel CVs (not to exceed two [2] pages each) as Annex A to the technical proposal.**

* 1. PAST PERFORMANCE INFORMATION (2 PGS max)

**Past Performance –** Narrative (1 pg. max)

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| --- |
| Briefly summarize relevant experience providing a capacity building program for staff of Financial Institutions similar to that outlined in the SOW. |
|  |
| Highlight any relevant examples of successfully completed recent enhancing capacity building program for staff of Financial Institutions on debt restructuring, rehabilitation of stressed portfolios and new financing in Sri Lanka. |
|  |
| Briefly describe the breadth and depth of your professional network(s) in relevant capacity building program with financial institutions. |
|  |
| Provide any additional relevant information you feel is relevant to this section below, space permitting |
|  |

**Past Performance –** 3 recent & relevant examples (1 pg. max)

|  |  |  |  |
| --- | --- | --- | --- |
| **SUMMARY INFORMATION ON UP TO 3 MOST RECENT & RELEVANT CAPACITY BUILDING PROGRAM** | | | |
| **DETAILS** | **Capacity Building Program 1** | **Capacity Building Program 2** | **Capacity Building Program 3** |
| Client/FIs Name |  |  |  |
| Client Point of Contact (POC) |  |  |  |
| Client POC phone and email address |  |  |  |
| Name of Financial Institutions |  |  |  |
| Geographical location |  |  |  |
| No of staff participated in the session |  |  |  |
| Type of Capacity building program (debt restructuring/rehabilitation and/or new financing |  |  |  |
| What type of Gaps identified for each respective FI |  |  |  |
| What type of Training Module Developed and submitted to FIs |  |  |  |

|  |  |
| --- | --- |
| I certify that the services outlined above have been carried out and can provide additional documentation to that effect if requested, either during the proposal evaluation process or at any point thereafter, should this proposal result in an award: |  |
| Signature of bidder or authorized company representative |

* 1. REFERENCE INFORMATION (1 pg. max)

|  |  |
| --- | --- |
| **Reference #1** | |
| **Reference Name** |  |
| **Reference Position Tite & Organizational Affiliation** |  |
| **Reference phone number** |  |
| **Reference email address** |  |
| **Is this reference a former client?** | Yes  No |
| **Briefly summarize the nature of your relationship with this reference** |  |
| **Reference #2** | |
| **Reference Name** |  |
| **Reference Position Tite & Organizational Affiliation** |  |
| **Reference phone number** |  |
| **Reference email address** |  |
| **Is this reference a former client?** | Yes  No |
| **Briefly summarize the nature of your relationship with this reference** |  |
| **Reference #3** | |
| **Reference Name** |  |
| **Reference Position Tite & Organizational Affiliation** |  |
| **Reference phone number** |  |
| **Reference email address** |  |
| **Is this reference a former client?** | Yes  No |
| **Briefly summarize the nature of your relationship with this reference** |  |

|  |  |
| --- | --- |
| I certify that the above information is accurate and hereby grant Palladium permission to contact the references listed above as part of the proposal evaluation process: |  |
| Signature of bidder or authorized company representative |

1. TECHNICAL UNDERSTANDING AND APPROACH (2 Pages Max)

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| --- |
| What strategies or approaches will you use to design and implement a capacity building program for staff of Financial Institutions on debt restructuring/rehabilitation and new financing specific to small and Medium-sized enterprises (SMEs)? |
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| What special approaches will you identify and strategize in debt restructuring to suit the current needs of the FIs? |
|  |
| Describe the nature of topics you intend covering in the module and methods of learning? |
|  |
| What are expected outcomes at the end of the program and what measurements will you suggest using for verifying the success of the program? |
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| What is the real impact in the levels of skills of the FIs staff, that you plan to make, after this program? |
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| Provide any additional relevant information you feel is relevant to the benefit of the program/FIs/Staff in debt restructuring/new financing, space permitting |
|  |

* 1. MANAGEMENT APPROACH (1 pg. max)

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| **For individual (consultant) offerors:** Describe how will you manage the level of efforts required to successfully complete the program in addition to your existing engagements?  **For organizational (firm) offerors:** Briefly explain the responsibilities of each team member or position expected provide/cover each section of the module agreed upon. Describe how would you ensure coordination within and across the teams? |
|  |
| How would you work with the FIs to identify gaps, develop the training plan and implementation of the program under the contract? |
|  |
| What other approaches will you take to ensure the successful implementation of the program? |
|  |
| Provide any additional relevant information you feel is relevant to this section below, space permitting |
|  |