

## **Request for Proposals**

### **Amendment 1**

Title: P.A.D.F. Environmental Social and Governance (E.S.G.) Strategy

Date Solicitation is Issued: September 2, 2022

Solicitation Number: 001.09-2-2022-ESG

New Closing Date: September 23, 2022

Closing Time: 6:00pm EDT (UTC-04:00)

Application Eligibility: Consulting firms and independent consultants

Contractual Mechanism: Fixed Price

#### **I. CALL FOR ESG CONSULTANT**

The Pan American Development Foundation (P.A.D.F.) is looking for a consultant to help develop its Environmental Social and Governance strategy that aligns with our mission, strategic goals, and our operations in accordance with international standards and in alignment with the United Nation’s Sustainable Development Goals (SDGs).

#### **II. PADF BACKGROUND**

The Pan American Development Foundation (P.A.D.F.) believes in creating a hemisphere of opportunity for all. We work across Latin America and the Caribbean to strengthen our region—more healthy, peaceful, just, inclusive, resilient, and sustainable for current and future generations. For 60 years, we have served the most vulnerable communities, investing resources throughout the hemisphere. We partner with and enable civil society, governments, and the private sector for the region's greater good.

With 60 years of experience across Latin America and the Caribbean and strong partnerships with local communities, civil society, and public and private sectors, we have an impeccable track record of success with extensive in-country networks and sound financial controls. We are uniquely positioned to develop and implement adaptable programs across multiple technical areas, quickly deploy to any country in Latin America and the Caribbean and activate existing local networks, measure and evaluate our impact with comprehensive performance indicators, and communicate our progress through integrated communications strategies.

A well-defined ESG strategy will facilitate growth, promote transparency, increase value to stakeholders and donors, and have a greater impact on the projects and communities we help.

### **III. TERMS OF REFERENCE, DELIVERABLES AND DELIVERABLES SCHEDULE**

#### **Analyze and Inform**

- Prepare and submit a brief analysis of international standards (e.g., Global Reporting Initiative (GRI), Sustainability Accounting Standards Board (SASB), or Global Initiative for Sustainability Rankings (GISR) or others) that might be most useful for a non-profit organization and why. This will include a table of findings.
- Prepare and submit an analysis of how to map the Sustainable Development Goals (SDGs) onto the key recommended ESG approaches.

#### **Assess and Reflect on PADF**

- Perform stakeholder engagement (survey and focus groups interviews with key communities and individuals relevant to PADF mission).
- Provide materiality assessment: After identifying different areas of ESG interest, materiality assessment is used to pinpoint the topics to focus on. These should be those that will deliver the highest sustainability impacts for the Organization.
- Develop a comprehensive Hemispheric ESG Risks and Opportunities report for the Organization.

#### **Strategize and Plan**

- Develop an ESG strategy and a workplan that identifies the sustainability/materiality issues in the areas of interest, the short- and long-term objectives, and key performance indicators in alignment with international standards and frameworks.

#### **Support ESG Roll-out**

- Collaborate across PADF functional teams (Programs, Operations, MEL, Finance, among other teams) to incorporate ESG measurements and data with greater accuracy, transparency, and assurance in all aspects of the Organization.
- Conduct capacity building, ESG training, and awareness activities for key PADF stakeholders and staff.

**Please propose dates for deliverables 1-2, deliverable 3 must be completed by January 31<sup>st</sup>, 2023, and deliverable 4 must be completed by March 31<sup>st</sup>, 2023.**

Schedule of Milestones/Deliverables				
	Estimated Completion Date	Milestone	Deliverable	Total Payment PADF
<b>1</b>	2 Weeks	Analyze and Inform	<ul style="list-style-type: none"> <li>■ Prepare and submit a brief analysis of international standards (e.g., Global Reporting Initiative (GRI), Sustainability Accounting Standards Board (SASB), or Global Initiative for Sustainability Rankings (GISR) or others) that might be most useful for a non-profit organization and why. This will include a table of findings.</li> <li>■ Prepare and submit an analysis of how to map the Sustainable Development Goals (SDGs) onto the key recommended ESG approaches.</li> </ul>	<b>USD\$ Proposed Amount</b>
<b>2</b>	2 months	Assess and Reflect on PADF	<ul style="list-style-type: none"> <li>■ Perform stakeholder engagement (survey and focus groups interviews with key communities and individuals relevant to PADF mission).</li> <li>■ Provide materiality assessment: After identifying different areas of ESG interest, materiality assessment is used to pinpoint the topics to focus on. These should be those that will deliver the highest sustainability impacts for the Organization.</li> <li>■ Develop a comprehensive Hemispheric ESG Risks and Opportunities report for the Organization.</li> </ul>	<b>USD\$ Proposed Amount</b>
<b>3</b>	January 31, 2023	Strategize and Plan	<ul style="list-style-type: none"> <li>■ Develop an ESG strategy and a workplan that identifies the sustainability/materiality issues in the areas of interest, the short- and long-term objectives, and key performance indicators in alignment with international standards and frameworks.</li> </ul>	<b>USD\$ Proposed Amount</b>
<b>4</b>	March 31, 2023	Support ESG Roll-out	<ul style="list-style-type: none"> <li>■ Collaborate across PADF functional teams (Programs, Operations, MEL, Finance, among other teams) to incorporate ESG measurements and data with greater accuracy, transparency, and assurance in all aspects of the Organization.</li> </ul>	<b>USD\$ Proposed Amount</b>

Schedule of Milestones/Deliverables				
	Estimated Completion Date	Milestone	Deliverable	Total Payment PADF
			■Conduct capacity building, ESG training, and awareness activities for key PADF stakeholders and staff.	
<b>TOTAL</b>				<b>USD\$ Proposed Amount</b>

#### IV. EVALUATION CRITERIA

Evaluation Criteria	Score out of 40
Does the proposal clearly explain, understand, and respond to the objectives of the project as stated in the Terms of Reference?	10
Demonstrated expertise and experience with similar projects	10
Personnel Qualifications – Do the proposed team members or individual, have the necessary experience and capabilities to carry out the Terms of Reference?	10
Cost: Best Value	10
<b>Total possible</b>	<b>40</b>

#### V. SUBMISSION DETAILS

- a. Deadline. Proposals must be received no later than September 23, 2022, 6:00pm EDT (UTC-04:00). Late submissions will not be accepted. Proposals must be submitted via email [procurement@padf.org](mailto:procurement@padf.org). All proposals are to be submitted following the guidelines listed in this RFP.
- b. Validity of bid. 120 days from the submission deadline.
- c. Clarifications. Questions may be submitted to [procurement@padf.org](mailto:procurement@padf.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. PADF 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 PADF website and/or communicated via email.
- d. Amendments. At any time prior to the deadline for submission of proposals, PADF may, for any reason, modify the RFP documents by amendment which will be posted to the PADF website and/or communicated via email.
- e. Timeline of Events

Request for Proposals Issued	September 2, 2022
Amendment Publish Date	September 15, 2022
Clarifications submitted to PADF	September 15, 2022
Clarifications provided to known bidders	September 19, 2022
Complete Proposals Due	September 23, 2022

## **VI. PROPOSAL DOCUMENTS TO INCLUDE**

- a. Signed cover page on bidder's letterhead with the bidder's contact information.
- b. 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 7 (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 Terms of Reference
  - iv. Completed Budget Template

## **VII. TERMS AND CONDITIONS**

### Resulting Award

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

### 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. PADF 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. PADF's evaluation results are confidential and applicant scoring will not be shared among bidders.

### Protection from Sexual Exploitation and Abuse (PSEA)

As part of the contractor's internal controls and standards of employee conduct, the contractor must ensure that its employees adhere to these standards of conduct in a manner consistent with the standards for United Nations (UN) employees in Section 3 of the UN Secretary-General's Bulletin – Special measures protection from sexual exploitation and sexual abuse (ST/SGB/2003/13).

### Contracting with Small, Minority, and Women's Businesses



PADF will take all necessary steps to assure that minority businesses, women's business enterprises, and labor surplus area firms are used when possible.

#### Debarment and Suspension

Entities that appear on any exclusion lists, System for Award Management (SAM), Office of Foreign Assets Control (OFAC), UN Sanctions List, and other watchlists, will not have their bid evaluated and will not be eligible to receive any subaward that may result from this Request for Proposals.

**ANNEX I, VENDOR INFORMATION**

Please Annex the following information in your submitted proposal:

<b>VENDOR INFORMATION FORM</b>		
1.	<b>Vendor Type</b> (Please indicate if a Firm or Individual Consultant)	
2.	<b>Registration Status</b> (Please indicate Employer Identification Number, Social Security Number, or other registration number)	
3.	<b>Vendor's Legal Name</b>	
4.	<b>Company Contact Full Name</b>	
5.	<b>Email Address</b>	
6.	<b>Full Business Address</b> (Including city, country, and postal code, if applicable)	
7.	<b>Category</b> (Not-For-Profit, For-Profit, Other)	
8.	<b>Based in the U.S.?</b> (Yes or No)	
9.	<b>Telephone Number</b>	
10.	<b>Government Owned Business?</b>	
11.	<b>Signature and Printed Name</b>	
12.	<b>Date</b>	

## ANNEX II, PADF CODE OF CONDUCT

PADF has an intrinsic set of values which can be categorized by H.E.A.R.T, which are categorized as:

**Honesty:** We work and express ourselves in an open, transparent, and clear manner.

**Excellence:** We strive for the highest results and standards, and work with clear and transparent processes deliverables, evidence and rigor. We are committed to those we serve, giving our time, energy, and dedication to what we believe in.

**Accountability:** We pride ourselves on our integrity. We accept responsibility for our actions. We rigorously manage our results, our deliverables, our documentation, and our knowledge.

**Respect:** We value diversity and other points of view. We are inclusive and empathetic. We foster cooperation, collegiality, and teamwork, working together toward the same ends. We seek to create a work environment of decency, working fairness, sincerity, and trustworthiness.

**Teamwork:** We work as ONE PADF committing to our common goals and objectives. We foster cooperation, collegiality, and teamwork. We make high-quality decisions as a team. We proactively and openly share knowledge, materials, and expertise. We foster and embrace innovation, creativity, and diverse points of view. We are one team.

Offerors and their agents shall always act with integrity. Offerors and their agents shall not:

- Offer gifts, employment, and other benefits to Pan American Development Foundation employees and others who are able to influence the award of a contract.
- Attempt to seek confidential information in respect to tendering and contract formation processes associated with this RFP from Pan American Development Foundation employees and others who have access to confidential information.

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 PADF's H.E.A.R.T. values.

Any violation of the Code of Conduct, as well as concerns regarding the integrity of the procurement process and documents should be reported to PADF via its Ethics Hotline at <https://secure.ethicspoint.com/domain/media/en/gui/66351/index.html>