

Request for Proposals

Title: Establishment of a Business Intelligence System for the SLV Project

RFP No: USAID-SLV-FY22-002

Date of Issuance: January 11, 2022

1. Background

Conservation International México A.C. (hereinafter referred to as “Conservation International México”), is issuing a Request for Proposals (RFP) for the Establishment of a Business Intelligence System for the SLV Project. 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 in collaboration with six consortium partners. 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. Small-scale producers in the four landscapes will be organized into twelve Collective Business Entities (CBE) to reach scale and ensure quality; and a Blended Finance Engine (BFE) that will provide services to the CBEs, such as project curation, a marketplace to link producers with buyers, and access to blended finance solutions from new and existing funds.

2. Project Overview

Conservation International Mexico (CI Mexico) and the United States Agency for International Development (USAID) created the Sustainable Landscapes Ventures (SLV) Project, whose purpose is to enable small producers, investors, and buyers to consolidate long-term partnerships in sustainable and inclusive value chains. This project is being implemented in

the "Mascota-Tapalpa" (Jalisco), "Sierra Sur" (Oaxaca), "Sierra Madre" (Oaxaca) and "Calakmul" (Campeche) landscapes.

The Project has three components which are, Collective Business Entities (CBEs); Blended Finance Engine (BFE), and the Monitoring, Evaluation, and Learning component (MEL). The first component's goal is to create 12 collective enterprises (CBEs) within the four landscapes providing marketing, distribution, processing, procurement, logistics, and financing services for small-scale producers. This will enable producers to increase the quality of their products and to create economies at scale by negotiating directly with buyers and investors on an equal level (sharing risks and benefits). This would also allow them to increase their profit margins by accessing new buyers and finance solutions adapted to the challenges they face.

Once the Project has been completed, the CBEs should operate autonomously and providing services to other small-scale producers with production criteria aligned with SLV objectives.

The CBEs are responsible for providing the following three services:

Marketing services - These seek to promote and sell each landscape's products, supporting the production and transformation of these products with the required quality and time.

Purchasing and logistics services - These seek to reduce agricultural input costs by increasing the volume of input purchases and their availability in the landscapes. Also, determining what products, and which quality and quantity producers need.

Financial services - These seek to distribute financing to producer organizations, by creating a portfolio of projects ready for financing and reduce financial costs.

The second component, the BFE, which curates the Producer Project's Organizations Portfolio in the four landscapes to achieve the market and investors requirements. Additionally, the BFE will help reduce access and cost barriers to sustainable value chains to enable organizations, investors, and buyers' participation. The BFE will be designed to maintain the services provided during the Project when it ends.

The BFE offers these three services:

- Marketplace - The Marketplace purpose is to establish relationships between buyers and CBEs to promote the collaborative design of commercial transactions between both parties (in synergy with the CBE market model of "sell first, then produce").
- Expert roundtables - The expert roundtables include the SLV team and other experts in sustainable and inclusive value chains, who provide technical assistance to ongoing CBE projects.
- Mixed funding sources - The BFE provides financing for seasonal working capital loans, early-stage first loss loans, and trade credits. It will start with three funds (one existing and two new) that will be leveraged and mobilized to invest in the portfolio of CBEs projects.

The third (cross-cutting) component is the Monitoring, Evaluation, and Learning (MEL) system which aims to track and monitor activities and compliance with established results; Identify

risks, trends, and synergies at the local and landscape-level; Track the safeguards in the four landscapes, and to create the basis for reassessing priorities through systematic data collection and analysis.

Furthermore, MEL seeks to enhance stakeholders' adaptive capacity to take advantage of market and investment opportunities by providing and producing information, knowledge, learning, and inputs at each stage of the project cycle. The MEL system will establish mechanisms to obtain and analyze information at different scales, sectors, and disciplines to achieve the latter. As part of this last objective, the project aims to improve the business performance and traceability of the enterprises that work with the project by providing them with intelligence to improve their decision-making.

Business Intelligence System (BIS)

Description

Enterprises supported by the Project require a robust gathering information system that provides intelligence to improve their business decision-making.

General objective

The general objective is to improve the business performance and supply chain traceability of the CBEs.

Specific objectives

1. Identifying and analyzing the business performance and supply chain traceability needs of the CBEs in terms of procurement, business operations, sales, management, and inventory management.
2. Implement a tailored strategy for each CBE to solve the needs identified by taking into consideration setting up sound financial, accounting and management systems as well as enterprise resource systems (ERP) and/or customer relationship management (CRM) or another system that could improve the enterprises' performance.

Key Tasks

- Identifying and analyzing the business operations and supply chain traceability needs of the CBEs in terms of procurement, business operations, sales, management, inventory management, and warehousing on an annual basis during the project's life.
- Developing and implementing a tailored strategy for each enterprise to solve the needs identified in the diagnostic carried out by taking into consideration setting up financial, accounting, management, and/or enterprise resource software systems--or another software system that could improve the enterprises' performance.

- Adapting and implementing an existing analytical framework to analyze and interpret the information generated from the technical systems.
- Providing technical support to the SLV Project, and CBEs staff regarding the technical systems implemented.

3. Scope of Work, Deliverables and Deliverables Schedule

- Deliverables and Deliverable Schedule - See Terms of Reference as Attachment 2

4. Submission Details

- a. Deadline. Proposals must be received no later than **March 4, 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. Minimum Requirements

The technical proposal must include confirmation that the candidate has experience in implementing the following software systems:

- Financial systems.
- Accounting and management systems.
- Supply chain traceability systems.
- Enterprise resource systems (ERP).
- Customer relationship management (CRM).

The proposal must integrate a monitoring and evaluation system that measures and evaluate the implementation of the proposed strategies for each enterprise. In addition, the technical proposal must include a methodology to provide technical support to rural enterprises in improving business performance.

It is important to notice that the Implementation Partner must include the software cost in the proposal budget.

Conditions of the proposed software systems

The recommended software systems must have the following features:

- The systems proposed must be adapted from existent ones.
- The systems proposed must be cost-effective.
- Transparency and users' confidentiality must be guaranteed.
- User-friendly interphase.
- The systems must be adjustable to expand to improve their capacity.
- The systems should be able to be used from a desktop or laptop computer, smartphone, and tablet regardless of the operating system of those devices.

In addition, the recommended software systems must be in operation with their licenses and the technical and user manuals available and updated.

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 an interview and proposal presentation, to take place between 14 March – 25 March 2022
- Based on the sum of the Technical and Financial Evaluation, the winner will be announced on April 8th, 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
<p>I. Technical proposal</p> <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 	150
<p>II. Work experience and management</p> <ul style="list-style-type: none"> • Possesses experienced staff and resources to successfully develop solutions for rural enterprises • Proven strategic and technical expertise • Understanding of current industry best practices and applicable privacy / data security requirements • Compatible Project management methodology • Proven track record building solutions for large, international nonprofits 	150

<ul style="list-style-type: none"> • Strong references verifying above qualities • Considerable experience working in complex multi-stakeholder and interinstitutional relationships. • Experience in the design of technological solutions for rural development projects and Business Intelligence Systems for the agricultural sector. • Experience in the design and implementation of successful productive, financial and management systems. • Experience in adapting products and services to market requirements and to the needs of smallholder agricultural producers. • 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. 	
<p>III. Cost Proposal-Cost Includes (Travel, fee, charges, software costs, any other expenses)</p> <ul style="list-style-type: none"> • Cost 	50
<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 	50

8. Proposal Timeline

RFP Issued	11 January 2022
Clarifications submitted to CI	31 January 2022
Clarifications provided to known bidders	11 February 2022
Proposals Due	4 March 2022
Interview and presentations	21 March – 31 March 2022
Final selection	8 April 2022
Contract Finalized	29 April 2022
Work Begins	2 May 2022

9. Resulting Award

CI anticipates entering into an agreement with the selected bidder by **May 2, 2022**. The successful bidder will have to agree to enter into contractual terms based

on CI's standard agreement templates for provision of services and/or the development of software systems and CI's template global data processing and security addendum, the terms of which are non-negotiable.

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
Business Intelligence System**

Overview

Name of the project where the grant is inserted:	Sustainable Landscapes Ventures (SLV)
Title of the grant:	Establishment of a Business Intelligence System for the SLV Project
Implementation Partner:	
Address:	
Telephone:	
Email:	
Main contact at CI:	MEL coordinator
Start date:	May, 2022
End date:	March 2025
Duration of the grant:	Three (3) years and six (6) months
Date of receipt of technical-economic proposals:	
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 MXN \$ 7,800,000 and MXN \$ 8,325,000

Project Description

Conservation International Mexico (CI Mexico) and the United States Agency for International Development (USAID) created the Sustainable Landscapes Ventures (SLV) Project, whose purpose is to enable small producers, investors, and buyers to consolidate long-term partnerships in sustainable and inclusive value chains. This project is being implemented in the "Mascota-Tapalpa" (Jalisco), "Sierra Sur" (Oaxaca), "Sierra Madre" (Oaxaca) and "Calakmul" (Campeche) landscapes.

The Project has three components which are, Collective Business Entities (CBEs); Blended Finance Engine (BFE), and the Monitoring, Evaluation, and Learning component (MEL). The first component's goal is to create 12 collective enterprises (CBEs) within the four landscapes providing marketing, distribution, processing, procurement, logistics, and financing services for small-scale producers. This will enable producers to increase the quality of their products and to create economies at scale by negotiating directly with buyers and investors on an equal level (sharing risks and benefits). This would also allow them to increase their profit margins by accessing new buyers and finance solutions adapted to the challenges they face.

Once the Project has been completed, the CBEs should operate autonomously and providing services to other small-scale producers with production criteria aligned with SLV objectives.

The CBEs are responsible for providing the following three services:

1. **Marketing services** - These seek to promote and sell each landscape's products, supporting the production and transformation of these products with the required quality and time.
2. **Purchasing and logistics services** - These seek to reduce agricultural input costs by increasing the volume of input purchases and their availability in the landscapes. Also, determining what products, and which quality and quality producers need.
3. **Financial services** - These seek to distribute financing to producer organizations, by creating a portfolio of projects ready for financing and reduce financial costs.

The second component, the BFE, which curates the Producer Project's Organizations Portfolio in the four landscapes to achieve the market and investors requirements. Additionally, the BFE will help to reduce access and cost barriers for the sustainable value chains to enable organizations, investors, and buyers' participation. The BFE will be designed to maintain the services provided during the Project when it ends.

The BFE offers these three services:

1. **Marketplace** - The Marketplace purpose is to establish relationships between buyers and CBEs to promote the collaborative design of commercial transactions between both parties (in synergy with the CBE market model of "sell first, then produce").
2. **Expert roundtables** - The expert roundtables include the SLV team and other experts in sustainable and inclusive value chains, who provide technical assistance to ongoing CBE projects.

3. **Mixed funding sources** - The BFE provides financing for seasonal working capital loans, early-stage first loss loans, and trade credits. It will start with three funds (one existing and two new) that will be leveraged and mobilized to invest in the portfolio of CBEs' projects.

The third (cross-cutting) component is the Monitoring, Evaluation, and Learning (MEL) system which aims to track and monitor activities and compliance with established results; Identify risks, trends, and synergies at the local and landscape level; Track the safeguards in the four landscapes, and to create the basis for reassessing priorities through systematic data collection and analysis.

Furthermore, the MEL seeks to enhance stakeholders' adaptive capacity to take advantage of market and investment opportunities by providing and producing information, knowledge, learning, and inputs at each stage of the project cycle. The MEL system will establish mechanisms to obtain and analyze information at different scales, sectors, and disciplines to achieve the latter. As part of this last objective, the project aims to improve the business performance and traceability of the enterprises that work with the project by providing them with intelligence to improve their decision making.

Business Intelligence System (BIS)

General objective

The general objective is to improve the business performance and supply chain traceability of the enterprises supported by the SLV Project.

Specific objectives

1. Identifying and analyzing the business performance and supply chain traceability needs of the CBEs in terms of procurement, business operations, sales, management, and inventory management.
2. Implement a tailored strategy for each CBE to solve the needs identified by taking into consideration setting up sound financial, accounting, management and/or enterprise resource software systems—or another system that could improve the enterprises' performance.

Key Tasks

- Identifying and analyzing the business operations and supply chain traceability needs of the CBEs in terms of procurement, sales, management, inventory management, and warehousing on an annual basis during the project's life.
- Developing and implementing a tailored strategy for each enterprise to solve the needs identified in the diagnostic carried out by taking into consideration setting up financial, accounting, management, and/or enterprise resource software systems--or another software system that could improve the enterprises' performance.
- Adapting and implementing an existing analytical framework to analyze and interpret the information generated from the technical systems.
- Providing technical support to the SLV Project, and CBEs staff regarding the technical systems implemented.

Conditions of the proposed software systems

The Implementation Partner must ensure that the recommended software systems are in operation with their licenses and the technical and user manuals available and updated. In addition, it is important to notice that the Implementation Partner must include the software cost in the proposal budget.

Features of the proposed software systems

- The systems proposed must be adapted from existent ones.
- The systems proposed must be cost-effective.
- Transparency and users' confidentiality must be guaranteed.
- User-friendly interphase.
- The systems must be adjustable to expand to improve their capacity.
- The systems should be able to be used from a desktop or laptop computer, smartphone, and tablet regardless of the operating system of those devices.

Estimated Timeline

May 2, 2022, until March 31, 2025.

Estimated Budget and Reporting

Within a range of USD 375,000 to USD 400,000 for the project's life with monthly progress reporting and specific products delivery according to annual work plans.

Location of Task/Applicable Trips

Travel to all landscapes is required to carry out a diagnosis and oversee the implementation of tailored strategies proposed. All the travel expenses should be included in the budget proposal.

The Project's implementation corresponds to following four landscapes:

- **Mascota-Tapalpa (Jalisco)**
- **Sierra Sur (Oaxaca)**
- **Sierra Madre (Chiapas)**
- **Calakmul (Campeche)**

Work Method

Proposed by the Implementation Partner in collaboration with CI Mexico and the SLV Project.

Deliverables/Estimated Outputs and work schedule

Deliverables	Description	Expected delivery date
A Work plan	This document describes the activities needed to achieve the goals established by the SLV project and this ToR. In addition, it contains a work plan timeline for all the activities proposed.	March 22
A diagnostic for each CBE in terms of their business operations and supply chain traceability needs	This document describes the business operation needs of the CBEs in terms of procurement, business operations, sales, management, inventory	On-going to the life of the project

	management, and warehousing on an annual basis.	
A strategy for each CBE to solve the needs identified in the diagnostic	This document establishes a strategic plan to solve the needs identified in the diagnostic carried out by taking into consideration setting up financial, accounting, management, and/or enterprise resource software systems--or another software system that could improve the enterprises' performance.	On-going to the life of the project
Report of the proposed strategies implemented.	This report describes how the proposed strategies were implemented according to performance criteria and indicators proposed by CI Mexico and the Implementation Partner.	On-going to the life of the project
A report on the implementation of the analytical framework to analyze and interpret the information generated from the technical systems.	This report must describe the analytical framework's implementation process to analyze and interpret the information generated from the technical systems.	
A report of the technical support provided to SLV Project, and CBEs staff.	This report describes how the technical support was provided to SLC Project, and CBEs staff.	

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 and Business Intelligence Systems for the agricultural sector.

- Experience in the design and implementation of successful productive, financial and management systems.
- Experience in adapting products and services to market requirements and to the needs of smallholder agricultural producers.
- 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.
- Possesses experienced staff and resources to successfully develop solutions for rural enterprises
- Proven strategic and technical expertise
- Understanding of current industry best practices and applicable privacy / data security requirements
- Compatible Project management methodology
- Proven track record building solutions for large, international nonprofits

Key team members skills:

- Excellent skills in managing complex multi-stakeholder and interinstitutional relationships.
- Excellent analytical skills and the ability to summarize disparate information in a clear and concise manner.
- Excellent research and data collection methodology skills.
- Ability to create organizational work plans.
- Skills in supporting staff with a variety of levels of knowledge and capabilities.
- Strong organizational skills.
- Ability to efficiently meet deadlines.
- Strong interpersonal skills.
- Strong skills in web and app development or implementation for business management of agricultural companies.
- Ability to work with multiple and diverse stakeholders including governments, NGOs, and small-scale productive organizations. Public and private organizations.

- Ability to communicate clearly across diverse socio-economic and cultural spectrum.
- Fluent writing and speaking in English.

Final considerations

The Implementation Partner must send his/her technical-economic 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 Implementation Partner to fulfil 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
BIS	Business Intelligence System

Attachment 2: Cost Proposal Template