



## Climate Finance for Development Accelerator (CFDA)

### Request for Proposals (RFP) #2023-0010-RFP: Project Preparation Facility for the Caribbean Climate Investment Program (CCIP)

#### Answers to Questions

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#### Technical Proposal

1. Will a permanent physical presence be required in any of the 11 designated countries throughout the life of the project?

No, a permanent physical presence is not required. In other words, offerors do not need to have staff or offices based in the 11 countries. That said, successful implementation of the subcontract will require significant in person interaction with local project developers and stakeholders, and this should be factored into the Management, Key Personnel, and Staff Plan under Section I.7 *Instructions for the Preparation of the Proposal* (p. 8).

2. How is the pipeline of projects expected to be distributed among the 11 designated countries?

The subcontractor should look for projects to support from each of the designated countries.

3. Can an offeror be composed by a main bidder supported by one or a group of specialized consultants with expertise in the Caribbean? Do these consultants need to be formal employees of the company submitting the bid? Section 1.4 only refers to “offerors may present their proposals as a member of a partnership with other companies or organizations” but makes no mention of the hiring of specialized consultants.

Section I.7 *Instructions for the Preparation of the Proposal* calls for offerors to propose a staffing plan with the titles, functions, and qualifications of all personnel (full-time staff, consultants, advisors), who will contribute to the technical implementation of the SOW (p. 8). This may include specialized consultants.

4. Does the slide deck of part 1 of the technical volume allow for annexes to be attached to the 12 slides? We are asking since we note that a full detailed approach of the private sector project origination strategy, project development gap analyses, advisory services and monitoring are required.

No. CCIP-CFDA will not review any additional information or annexes than those requested in the RFP.

5. Same question for part 2(a), 2(b) and part 3.

See answer to Question 4.

6. On the three references requested under Part 3 is there a maximum past date.

Yes, references should be provided from clients with whom the offeror is currently working with or has worked with in the past five years. Please refer to the revised text in Section I.7 *Instructions for the Preparation of the Proposal* of 2023-0010-RFP Amendment 1.

7. Please clarify the concept of “the extent to which the offeror’s staffing plan is robust and engages Caribbean local actors in roles of responsibility essential to advisory services.” Are these “local actors” expected to be introduced or identified at the time of the proposal?

Offerors should explain how they plan to meaningfully engage local staff, subcontractors, and/or partners in the Management, Key Personnel, and Staff Plan under Section I.7 *Instructions for the Preparation of the Proposal* (p. 8).

8. Please expand on the size of the pipeline of projects. The RFP indicates that the procurement will support a minimum under 30 projects but under what period of time? Are all 30 projects expected to receive financing during the time of the procurement or is it acceptable that they will be at different stages?

The successful offeror shall support a minimum of 30 projects throughout the life of the subcontract (i.e., three years) with a minimum of five memoranda of understanding (MoUs) between the project developer/owner and prospective investor(s) that provides the roadmap towards financial closure. See Section I.7 *Instructions for the Preparation of the Proposal* and Section II.3 *Deliverables* for more information. Offerors that present technical approaches with more ambitious targets (i.e., targets higher than the minimum number of projects incorporated into the pipeline and minimum number of signed MOUs) and are still realistic and reflective of the operating realities across the Caribbean will be evaluated more favorably.

9. Please quantify the expected project size meant by “SMEs and projects outside the utility-scale segment.”

CCIP-CFDA does not have a set definition for SMEs. As a general rule, we expect offerors to support projects that have a ticket size below 10 million dollars and are not considered utility-scale.

10. Please clarify whether existing regional funds or facilities in the Caribbean need to have been contacted as part of the proposal.

CCIP-CFDA does not require offerors to contact regional funds or facilities in the Caribbean as part of the proposal. That said, the successful offeror will need to work with funding sources to achieve some of the subcontract deliverables. If offerors currently have relationships with or a network of existing regional funds or facilities, they are welcome to incorporate them into their proposal.

11. While section 2.2 talks about 30 projects, deliverables no. 10 to no. 12 note that the subcontractor must incorporate at least 6 projects in Year 1, 12 projects in Year 2 and 15 projects in Year 3. That is a total of 33 projects. Please, clarify the difference. Same comment for deliverables no. 13 to no. 15.

The successful offeror shall support a minimum of 30 projects throughout the life of the subcontract. The referenced sentence under “Deliverables No. 10 to 12: Annual Project Presentation” in Section II.3 *Deliverables* should read: “The Subcontractor must incorporate at least six (6) projects into the pipeline in Year 1, **14 projects in Year 2, and 10 projects in Year 3.**” Please refer to the revised text in Section II.3 *Deliverables* of 2023-0010-RFP Amendment 1.

12. Please clarify whether our understanding of deliverables no. 16 to 20 is correct and that it is expected that at least 5 projects will make it to MOU stage and that would be a satisfactory result of the project.

The number of deliverables is correct, and it is expected that *at least* five projects will secure formal negotiations towards financial closure, as evidenced by the project developer and prospective investor(s) signing an MOU for that purpose. Offerors that present technical approaches with more ambitious targets (i.e., targets higher than the minimum number of projects incorporated into the pipeline and minimum

number of signed MOUs) and are still realistic and reflective of the operating realities across the Caribbean will be evaluated more favorably.

13. On success fee, and noting that Chemonics will not disallow the subcontractor to exercise the practice of charging project developers a success fee, kindly let us know if Chemonics is likely to impose an expected cap on such fee.

Chemonics will discuss any potential success fee with the selected offeror during the subcontract negotiation and award phase. Plerevised text in Section II.3 *Deliverables* of 2023-0010-RFP Amendment 1.

14. Do we have complete flexibility in scheduling the installments and corresponding deliverables or is Chemonics expecting a particular schedule?

The RFP calls for offerors to propose a schedule for the deliverables described under Section II.3 *Deliverables*. Per Section I.8 *Evaluation and Basis for Award*, offerors will be evaluated on the extent to which the proposed schedule for completing deliverables ensures an efficient and timely implementation of the technical approach.

15. On page 17 the RFP states several ratios to be analyzed. Could CFDA elaborate on what is meant by the following ratio: “developers served vs financial facilitation ratio”?

Not all of the projects served may be ready to be presented to funding sources, which is the kick-start to the financial facilitation process. This is the ratio between developers/projects served by the project preparation facility [at least 30] vs how many reach the point that can be presented to investors.

16. On page 18 the RFP states that “subcontractor must incorporate at least six (6) projects into the pipeline in Year 1, 12 projects in Year 2, and 15 projects in Year 3.” Would it be acceptable for the offeror to propose a different minimum project total in each year as long as the total projects incorporated into the pipeline throughout the entire activity over 3 years remained the same?

The RFP provides a minimum requirement per year that is consistent with the objectives of this activity. Therefore, while offerors can modify the yearly distribution projects incorporated into the pipeline, the new targets cannot be below the minimum [“at least”] required. Offerors that present technical approaches with more ambitious targets (i.e., targets higher than the minimum number of projects incorporated into the pipeline and minimum number of signed MOUs) and are still realistic and reflective of the operating realities across the Caribbean will be evaluated more favorably.

17. As we are a new U.S. company, it would be prudent for us to partner with a larger entity to compete for the subject opportunity. Can you guide us in connecting with potential CFDA bidders who might partner with our firm on this opportunity?

Unfortunately, Chemonics is unable to connect you with other potential CCIP-CFDA bidders. A full list of members of the Climate Finance Investment Network (CFIN) is available online should it be helpful: <https://www.climatelinks.org/resources/climate-finance-investment-network-list-members>. We will consider providing matchmaking support for future solicitations.

18. Does the requirement for description of similar work and three references in the Caribbean include all consortium members or only the Prime/Lead Contractor?

CCIP-CFDA requires the description of similar work and three references by the offeror, which may be an individual company or a consortium.

19. From page 16 of 64: target countries of: the Dominican Republic, Jamaica, Dominica, Grenada, St. Kitts and Nevis, St. Lucia, and St. Vincent and the Grenadines, Barbados, Trinidad and Tobago, Guyana, and Suriname. Please confirm the above target countries are the same as the priority countries noted on page 17 of 64.

The “priority countries” mentioned page 11 of the RFP are the same as the “target countries” listed under Section II *Scope of Work* as well as those named under the “geographic scope” in Section I.1 *Introduction*.

20. Please confirm if bidder must prefill the FFP Subcontract and submit or only Reps and Certs noted.

Offerors should not prefill the subcontract template. Offerors should only submit their proposals – consisting of a cover letter, three-part technical volume, and budget spreadsheet and narrative – as well as the required representations and certifications listed in Annex 1 *Cover Letter*.

21. Please clarify the relevant scope and definition of climate adaptation projects for this mandate, particularly whether there are any prioritized sectors or types of projects.

CCIP-CFDA has not defined climate adaptation solutions. While there are definitions under UNFCCC and others, we suggest reading the Adaptation Solutions Taxonomy of the Adaptation SME Accelerator Project, dated July 2020 or the IPCC Working Group II Contribution to the Sixth Assessment Report “Climate Change 2022: Impacts, Adaptation and Vulnerability,” IPCC 2022.

22. We understand that the purpose of the activity is to design and implement a Project Preparation Facility under the Climate Finance for Development Accelerator (CFDA). Within the introduction, section 1.1, specific reference to developing a “robust, actionable pipeline of deals that are ripe for investment across the project’s geographic scope and technical mandate, with a priority on investment in or in support of small – medium-sized enterprises (SMEs)” is made. Later within the same section, it is written, “Through this procurement, Chemonics International intends to award one subcontract for the design and implementation of a PPF that will develop a pipeline of renewable energy, energy efficiency, and climate adaptation projects at different stages of the pre-investment cycle, provide advisory services to the projects in the pipeline to ensure they are investment ready; and provide investment facilitation to allow them to reach financial closing.” To meet the objectives of this program, would Chemonics expect a deal pipeline that comprises both projects and operational enterprises that require investment? If so, is there a desirable ratio of projects to operational enterprises?

Developers are those bringing projects forward. Depending on the financial structure defined for a project, the developer may or may not need to capitalize its operations. The second sentence referenced should read: “Through this procurement, Chemonics International intends to award one subcontract for the design and implementation of a PPF that will develop a pipeline of renewable energy, energy efficiency, and climate adaptation projects at different stages of the pre-investment cycle, provide advisory services to **developers/owners whose projects are** in the pipeline to ensure they are investment ready; and provide investment facilitation to allow **projects** to reach financial closing.” Please refer to the revised text in Section I.1 *Introduction* of 2023-0010-RFP Amendment 1.

23. With respect to the Pipeline Development, are there projects already identified that could form part of the pipeline, or would the Subcontractor start from scratch to identify the projects?

CCIP-CFDA does not have any existing pipeline, it is expected that the Subcontractor will start from scratch, unless it already has a pipeline of its own.

24. Negotiations as a part of Advisory Services, Investment Facilitation, and Deal Structuring are normally accompanied by lawyers. Is the Subcontractor expected to provide these lawyers, or will they be hired separately (such as, by the investor / developer(s))?

Yes, the Subcontractor is expected to provide lawyers, as/if necessary.

25. Is it possible to split the Key Personnel: Financial Transaction Advisor role into two personnel: 1) with the years of experience and education requirement and 2) the other with a demonstrated track record of mainstreaming gender equity and social inclusion.

No. Offerors should identify and propose key personnel in accordance with the position, description, and preferred qualifications outlined under Management, Key Personnel, and Staffing Plan of Section I.7 *Instructions for the Preparation of the Proposal* (p. 8). Offerors may name up to one (1) additional key personnel, if they believe another key personnel position would augment their management strategy.

26. Is the minimum number of projects to be supported by the offeror is 30, or is the minimum number of projects to be progressed to an investment-ready stage is 30?

See answer to Question 11.

27. Are there any defined criteria to decide whether the project has reached an investment-ready stage?

Yes, see “Investment Facilitation” under Section II.2 *Scope of Work*.

28. We understand that the minimum number of projects to be supported is 30, however, as per the description in the deliverables no. 10 to 12, the minimum number of projects from years 1 to 3 sums to 33. Can you please clarify if the minimum number of projects is 30 or 33?

See answer to Question 11.

29. The last sentence mentions the Letter of Intent to be signed by “offerors or funding services.” We assume the MoUs need to be signed by the funding providers and signature by offerors is a drafting error. Please confirm.

CCIP-CFDA will not require the Subcontractor to submit signed letters of intent. The referenced sentence under “Deal Structuring” of Section II *Scope of Work* should read “This may involve organizing investment forums, business matchmaking events, and networking opportunities to connect SMEs with investors interested in clean energy and climate-adaptation in CCIP-CFDA’s priority areas of RE, EE, and climate adaptation with the goal of, at minimum, **securing formal negotiations towards financial closure for five (5) projects, as evidenced by a signed Memorandum of Understanding between the project developer and prospective investor(s).**” Please refer to the revised text in Section II.2 *Scope of Work* in 2023-0010-RFP Amendment 1.

30. Are there any restrictions on the % of non-U.S. citizens and/or non-US companies involved in the performance of this subcontract?

No. However, per Section I.8 *Evaluation and Basis for Award*, offerors will be evaluated on the extent to which the proposed staffing plan engages local Caribbean actors in roles of responsibility essential to advisory services.

31. The Offeror shall procure and maintain in force, on all its operations, insurance in accordance with the charts listed. Is it applicable even to a non-US company?

The Subcontractor, regardless of where it is registered, must procure Defense Based Act (DBA) insurance, private automobile insurance, and/or medical evacuation services (MEDEVAC), in accordance with the terms stipulated in Section I.11 *Insurance and Services*. Offerors should read the respective Federal Acquisition Regulations (FAR) and USAID Acquisition Regulations (AIDAR) carefully to determine the applicability of the insurance based on their proposed operations and existing health programs. Additionally, the Subcontractor shall obtain the insurance in form and substance satisfactory to Chemonics, per the table under “e” of Section I.11 *Insurance and Services*.

32. Should the policies of insurance be procured in the US by a Mexican company (the offeror)?

See answer to Question 31.

33. Section III Firm Fixed Price Subcontract (Terms and Clauses) the link to the subcontract format is not available as it takes you to a sharepoint archive. Are the sections D to Z the main clauses of the contract to be signed and should be filled in by the subcontractor?

The first paragraph under Section III *Firm Fixed Price Subcontract (Terms and Clauses)* may be ignored as the subcontract terms and clauses are provided in Sections D.1 to Z.7. Please refer to the revised text in Section III. *Firm Fixed Price Subcontract (Terms and Clauses)* of 2023-0010-RFP Amendment 1.

34. Z.6 Federal Funding Accountability and Transparency Act (FFATA) Subaward Reporting Questionnaire And Certification For Subcontracts And Sub-Task Orders Under Indefinite Delivery/Indefinite Quantity Subcontracts: If positive response to Section A, are the offeror also exempt to have a UEI number?

In line with Section I.4 *Eligibility Requirements*, offerors must provide a UEI number if selected to receive a subaward valued at \$30,000 or more, unless exempted in accordance with information certified in the Evidence of Responsibility Form (Annex 3).

### **Cost Proposal**

1. Please confirm there are no page limitations for Cost Narrative and this document may be drafted in Word (for conversion to PDF).

There are no page limitations for the budget narrative. Offerors may draft the budget narrative in Word prior to converting to PDF for submission.

2. Could amount of the proposal budget be in USD even if the offeror is not a US Resident company?

All cost information must be expressed in USD regardless of the location and/or registration of the offeror.