

Trade Facilitation Office (TFO) Canada

Request For Proposal for evaluation of TFO Canada services

Background

Trade Facilitation Office (TFO) Canada is a not-for-profit organization whose mission is to improve lives through the creation of sustainable trade partnerships for exporters from developing countries with Canadian and foreign buyers. TFO Canada assists Small and Medium sized enterprises (SMEs) and Trade Support Institutions/Trade Promotion Organizations/Business Support Organizations (TSIs/TPOs/BSOs) from developing countries to access international markets through its information (general and sector specific), advice (including capacity building) and contact services (including trade missions and business to business matchmaking). Since 1980, TFO Canada through its internationally experienced project management staff and roster of sectoral experts have been providing trade promotion and capacity building services to tens of thousands of SMEs and over 2000 of TSIs/TPOs/BSOs from all corners of the globe (Latin America, Africa, Middle East, Asia). TFO Canada's services are described as follows:

- **Research and Market Intelligence**
 - Market Information Papers
 - MBA Market Entry Studies
 - Market prospecting studies
- **Capacity building and skills development of TSIs/TPOs/BSOs**
 - Gender Equality and Social Inclusion (Board and Senior Management)
 - Training of Trainers (Technical staff)
 - Training of Trade Representatives
 - Webinars
- **Capacity building of SMEs**
 - Training
 - Export readiness assessment
 - Coaching (product adaptation, promotion etc.)
- **Market access and trade promotion**
 - B2B meetings and trade missions (outgoing, in-coming, virtual)
- **Trade Facilitation**

For over 43 years, TFO Canada has worked in a wide range of developing countries and emerging economies. It has become the primary Canadian provider of export readiness training and information on the Canadian import market as well as other foreign markets for TSIs/TPOs/BSOs and exporters from developing countries. TFO Canada's programs are designed to enhance skills and build capacity in the areas of export competitiveness, market access, and trade promotion. Specific projects are implemented by TFO Canada staff and by drawing on a roster of consultants with expertise in a wide range of trade matters. TFO Canada staff work hand-in-hand with an extensive network of associates (trade specialists, sector experts and researchers) with technical expertise in

sectors such as food and beverage, apparel/textile, fashion accessories, footwear, home décor, IT services etc., to assist SMEs in developing countries with market entry research, to provide coaching on product development, and create sustainable linkages with external markets, especially Canada.

TFO Canada's largest funder is the Global Affairs Canada (GAC). It also delivers programming with funding from international institutions such as the International Trade Center (ITC), Inter-American Development Bank (IADB), International Islamic Trade Finance Corporation (ITFC) of the Islamic Development Bank (IsDB) group, Islamic Centre for Development of Trade (ICDT) and Global Alliance for Trade Facilitation (GATF), as well as Canadian funders, such as International Development Research Centre (IDRC), Cowater International and the Conference Board of Canada.

Following are TFO Canada's recent projects:

- 1) Women in trade for inclusive and sustainable growth (funder GAC; 2019-2025)
- 2) Making trade for women in sub-Saharan Africa (funder GAC; 2019-2025)
- 3) Supporting the private sector development through investment promotion to help Haitian small and Medium Enterprises access the North American market (funder IADB, 2022-2024)
- 4) Export Launchpad Uganda (funder ITFC; 2022-2023)
- 5) Improving risk management of import control and inspection system of fish (funder GATF; 2022-2023)
- 6) Improving procedures and authorizations for exports and imports of processed food (funder GATF; 2021-2022)
- 7) Training workshops on access to markets and management of value chains for the benefit of women (funder ICDT; 2023-2024)
- 8) Market prospecting study on export of processed food in Canada (funder PROMPERU; 2022-2023)
- 9) Information and Communications Technology (ICT) landscape and needs assessment for the Canadian market (funder GAC; 2022-2023)
- 10) Women in trade knowledge platform to boost for inclusive and sustainable growth (funder IDRC; 2020-2022)

To improve its effectiveness and efficiency, TFO Canada has decided to conduct an evaluation of its technical assistance services described above.

Objective

To provide evidence-based opinion from an independent entity to allow TFO Canada to assess progress, effectiveness and impact of its technical assistance services.

Scope

The evaluation is expected to respond to the Organization for Economic Co-operation and Development (OECD) key criteria for evaluations related to **relevance, efficiency, effectiveness, coherence, impact and sustainability**¹.

¹ <http://www.oecd.org/dac/evaluation/daccriteriaforevaluatingdevelopmentassistance.htm>

The evaluation, among other things, will reveal what is happening with target groups and provide a holistic qualitative assessment beyond numbers. The assessment or questions of the evaluation will cover, but will not be limited to, evaluation of the following areas:

1. Technical assistance services [*Relevance, Efficiency, Effectiveness, Coherence, Impact, Sustainability*]
 - a. Process: the degree to which the technical assistance services responds to the realities of the stakeholders, especially women, SMEs and TSIs/TPOs/BSOs in target countries
 - b. Log frame and outcome mapping
 - c. Monitoring and results management
 - d. Identification of progress in key sector indicators (outcomes and output) level
 - e. Review of program activity against strategy in each output area (including analysis of spending, costs per output) i.e., capacity building, buyer engagement, market access, institutional policy influence etc. In particular, how TFO Canada's approach influences TSIs/TPOs/BSOs policies and business environment improvement and how relevant is the engagement with buyers/importers, SMEs, TSIs/TPOs/BSOs that TFO Canada targets within the value chains.
2. Operations [*Efficiency, Effectiveness, Sustainability*]
 - a. Administration of TFO Canada and its activities
 - b. Service delivery models and processes (grants vs. direct delivery, consultants vs. staff, local experts vs. international experts, public vs. private TSIs/TPOs/BSOs) and how it supports or hinders smooth operation of projects that TFO Canada manages
3. Strategy [*Effectiveness, Impact, Sustainability, Relevance*]
 - a. Theory of change and design of TFO Canada's implementation strategies for the selected sectors/commodities, e.g., the use of market facilitators (TSIs/TPOs/BSOs, local and international experts etc.)
 - b. Strategic alignment, how TFO Canada intends to achieve overall impact and balance of investment (budgets) between the technical assistance services and
 - c. Sector and target market selection criteria and impact to the target groups
 - d. Strategic Risks
4. Cross cutting issues- how is TFO Canada is meeting its strategic objective relative to the following cross cutting issues: Gender Equality and Social Inclusion, Environment and Climate Change, Socially Responsible Business Practices.

Team requirements

The evaluation team leader will have a suitable background and experience with trade promotion and facilitation development programs, as well as solid experience in leading review or evaluations of complex programs. Included in evaluation team should be Gender Equality and Social Inclusion,

Environment and Climate Change, Socially Responsible Business Practices experts with experience working on SMEs in agriculture, manufacturing (specialty apparel, home décor, handicraft) and services (ICT) programs in Sub-Saharan Africa, Latin America & Caribbean and Asia & Middle East. Practical understanding of how the private sector (SMEs) and private and public sector TSIs/TPOs/BSOs engage in trade promotion and trade facilitation program interventions will be an added advantage.

Methodology

The team must submit the proposed design and methodological approach for conducting the evaluation when submitting a proposal (see below on proposal submission). Because of the nature of TFO Canada's mission – which aims to play a catalytic role by engaging in a number of interventions, TFO Canada will favor a conceptual framework for the proposal, which follows a theory-driven approach.

TFO Canada anticipates the evaluation design will be guided by the following principles:

- a. Diagnosing the TFO Canada's strategy and theory of change through a review of a few key log frame's vertical logic (including results chains of the various selected projects)
- b. Understanding the context through a thorough review of documents and discussions with different stakeholders
- c. Using mixed methods approach (through integrating the methods and tools used for collecting and analyzing both quantitative and qualitative data).

The team will have to provide both qualitative and quantitative evaluation:

- Review of the TFO Canada's structure and intervention approach
- Analysis of achievements against the log frames of key projects
- Analysis of the capacity enhancement/training/mentorship provided to implementing partners (TSIs/TPOs/BSOs), SMEs and other stakeholders
- Analysis of potential impacts (job creation, export sales, etc.)
- Analysis of the monitoring and results measurement system
- SWOT analysis of different technical assistance services
- A best and a worst case identifying best practice and key lessons per technical assistance service and value chain
- A set of conclusions/recommendations regarding different technical assistance services, value chains and stakeholders

Award Criteria

Proposals will be scored on both the technical and financial proposals, with 80% of the score being allocated to the technical submission and 20% being allocated to financial proposal. Only those Proposals meeting the minimum technical score threshold of 80% will be considered for financial evaluation and the winning proposal will be determined by the highest combined score of technical and financial proposals.

Deliverables

Phase/Effort	Tasks	Main Deliverables	Deadline
1. Inception	Review all relevant documents associated as mentioned in the Terms of Reference. Briefing with TFO Canada staff.	A methodology and work plan maximum 15 pages (excluding annexes). It will outline design details of the study, including: a) the methodology (sample design, approach and define data collection tools); and b) explain the specifics of how it will be conducted (timing, stakeholders involved, etc.)	
2. Data collection and analysis	Collate and analyze all relevant data from secondary and primary sources Carry out and provide a preliminary analysis of surveys and interviews as defined in the inception report	Share/discuss with TFO Canada on the progress of the review	
3. Reporting and Communication	Prepare draft findings Final evaluation report, will include findings of the evaluation, and detailed recommendations	Draft evaluation report presented to TFO Canada for review and comments Revised according to TFO Canada comments	

Responsibilities

It will be the responsibility of the consultants to:

- Lead discussions/interviews on all the meetings scheduled for this exercise
- Present to TFO Canada key findings
- Produce draft and final reports as specified above

It will be the responsibility of TFO Canada to:

- Assist the evaluation team in completing the review and engaging with other stakeholders
- Coordinate and organize virtual meetings with stakeholders and related logistics as requested by the evaluation team

- To arrange meetings and logistics for the evaluation review
- Ensure the consultants receive relevant information and background documentation
- To review the draft evaluation report submitted by the consultants
- Lead the discussions on recommendations provided by consultants

Duration

The consultancy assignment is expected to start in October 2023 and should take approximately 8 weeks to complete.

Budget

Fixed-Price Contract will be awarded to successful bidder. Expenses related to virtual meetings (if any) with project stakeholders shall be agreed upfront as part of the contract and will be billed based on actual cost.

Structure of the proposal

Interested and qualified individuals/consulting firms should submit a proposal with details on the following:

- Technical proposal with the proposed methodology and work plan for performing the assignment. Technical bids should also contain CVs of the proposed team members and relevant experience in providing similar services. Please use the formats provided in Appendices A and B for Consultant's Experiences and CV(s) respectively.
- It is also expected of a consultant to provide an indicative date of availability to commence work if selected.
- Financial proposal with a detailed breakdown of professional fees and a list of reimbursable expense items for the assignment. Please use the format provided in Annex C and include detailed notes for budget items including the basis and assumptions of the costs.

Any questions relating to this call for proposal can be sent to fatima.zahra.idrissi@tfocanada.ca up to 5 days before the submission deadline.

Proposal Submission

Proposals, Technical and Financial, should be in English and must be received at the email address below no later than 15th September 2023 at **16:00 Hours (EST)** with the subject line "**Proposal: TFO CANADA Evaluation.**"

Email: hr@tfocanada.ca

Proposal submissions should include the following:

1. Technical and Financial Proposals in separate files with file name "Tender for TFO CANADA

Evaluation” and the words “*Technical*” or “*Financial*” Proposal clearly indicated and on the email subject line

2. Technical proposal should, but not limited to, include:
 - Methodology and deliverables, including conceptual framework for the proposal, which follows a theory-driven approach
 - Description of the firm/individual/group of individuals making the proposal highlighting their qualification (please see Appendix A and B), relevant experience and current activities which demonstrate their capacity to fulfill the responsibilities of this assignment. The presentation should include a current C.V. (as per Appendix B) of the individual making the proposal; if the proposal is made by a firm or group of individuals, the CVs of the proposed consultant(s)/resource person(s) must be provided
 - Technical proposal should also include a brief description of three (03) recent projects (last 05 years) that the proponent has worked on that are similar in nature (as per Appendix A)
 - Workplan in line with the assignment description (including timeline). Please highlight any suggested and/or required changes to described assignment
3. The financial proposal should include detailed information on Level of Effort (LoE) in terms of person-days (7.5 hours/day; maximum 05 working days/week) and daily rates in CAD (as per Appendix C).

Only interested bidders who have submitted their proposals **on time** will be contacted to acknowledge receipt of their proposals.

The proposal should be concise, specific, and complete but demonstrate capabilities and expertise with respect to achieving the objectives of the evaluation. The full proposal excluding any annexes should be no longer than 15 pages.

OTHER MATTERS

a) Mobilization

The bidder should provide signed letters of intent for proposed personnel indicating their ability to perform the services if selected and their date of availability, no later than two weeks from the contract award.

b) Performance of Contractor Personnel

The contractor will have up to two weeks to resolve any performance issues related to personnel performance. After two weeks the contractor will be afforded the opportunity to replace non-personnel with another qualified person, based on the qualifications expressed in the statement of work. Failure to adequately replace non-performing personnel will be grounds for termination.

c) Confidentiality

All information contained in the invitation letter, terms of reference and attachments is provided

on a strictly confidential basis solely for the use of bidders in connection with a competition for the supply of services for the above contract. It is a condition of this competition that bidders (and any sub- contractors) shall:

- take all reasonable measures to protect this confidentiality and avoid the unauthorized use, disclosure, publication, or dissemination of confidential information;
- not use this information other than for the purposes of preparation of a tender, and shall disclose it only to officers, directors, or employees on a specific need to know basis; and
- not disclose, publish or otherwise reveal any of the information contained herein except with the specific prior written authorization of TFO Canada.

d) Conflict of Interest

Bidders must disclose in their bid details of any circumstances, including personal, financial and business activities that will, or might, give rise to a conflict of interest, if they were awarded this contract. Where bidders identify any potential conflicts, they should state how they intend to avoid such conflicts. TFO Canada reserves the right to reject any tender which, in its opinion, gives rise, or could potentially give rise to, a conflict of interest.

e) Obligation

Submission of a bid proposal by a firm does not imply any obligation of TFO Canada to select the firm for the assignment. All decisions by TFO Canada are final and cannot be appealed. All decisions are subject to availability and approval of funding by TFO Canada.

Reference Documents

The following documents will be provided to parties interested in submitting a proposal (please indicate your interest to Fatima-Zahra Idrissi by email at fatima.zahra.idrissi@tfocanada.ca) based on non-disclosure agreements:

1. TFO Canada strategic plan
2. Project PIPs, Log frames (WIT, SMO), Annual Results and Annual Operations Reports; Monitoring Evaluation and Learning Plans.
3. Knowledge products i.e., brochures, case stories, flyers, print media, video clips, etc.
4. Communication Strategy
5. Annual impact report
6. Sample GESI reports

TFO Canada strives to ensure gender equality for men and women in their participation in TFO Canada's programs, projects, and activities, and in TFO Canada's employment, contracting, and management opportunities.

As a signatory to the Canadian Centre of Expertise on the Prevention of Sexual Exploitation and Abuse

(DIGNA) and to the Anti-Racism Framework for Canada's International Cooperation Sector, TFO Canada has the moral, ethical, and legal responsibility towards its staff, consultants, beneficiaries, and clients and applies a zero-tolerance approach.

For more information on TFO Canada visit www.tfocanada.ca

Appendix A

Using the format below, provide information on each assignment for which you/your firm was contracted for carrying out consulting services similar to the ones requested under this assignment

Consultant Experience

Assignment Name:		Country:
Assignment Location within country:		Duration of assignment (months):
Name of Client:		Professional Staff provided by your Organization: No of Staff: No of Person-Months:
Start Date (Month/Year)	Completion Date (Month/Year)	
Name of associated Consultants, if any:		No of Person-Months of Professional Staff provided by associated Consultants:
Name of Senior Staff (Project Director/Coordinator, Team Leader) Involved and Functions Performed:		
Detailed Narrative Description of Project:		
Detailed Description of Actual Services Provided by you/your Staff:		
Individual/Firm Name:		
Authorised signature:		

References Contact

(pleased provide 3)

Name:

Email:

Phone Number:

Appendix B

Curriculum Vitae (CV) for individual consultant/each proposed professional staff (if applicant is a firm)

CURRICULUM VITAE (CV) FOR CONSULTANT/PROPOSED KEY STAFF			
1. Proposed position:			
2. Name of firm:			
3. Name of staff:			
4. Date of birth:		Nationality:	
5. Education:			
6. Membership in professional associations:			
7. Other training:			
8. Countries of work experience:			
9. Languages:	Speaking:	Reading:	Writing:
English			
French			
Spanish			
10. Employment record:			
From:	To:	Employer:	Position held:
11. Detailed tasks assigned:			
12. Work undertaken that best illustrates capability to handle the tasks assigned:			
Certification: I, the undersigned, certify that to the best of my knowledge and belief, this CV correctly describes myself, my qualifications, and my experience. I understand that any willful misstatement described herein may lead to my disqualification or dismissal, if engaged.			
		Date:	
[Signature of staff member or authorized official from the firm]		[Day/Month/Year]	
Full name of authorized representative:			

Appendix C

Financial proposal - Fees

Name	Position	Daily charge out rate CAD*	Total number of days (7.5 hours/day; maximum 05 working days/week)	Total Fees CAD
		CAD		CAD
		CAD		CAD
		CAD		CAD
		CAD		CAD
Total				CAD

The bidder will be subjected to local taxes. It is the sole responsibility of the bidder to meet all the tax obligations.

Financial proposal - Disbursement Expenses

Category of expenditure	Unit rate CAD	Number	Total cost CAD
Total			

Many thanks for your interest in this assignment and for your time and effort in preparing your proposal!