



REQUEST FOR QUOTATION (RFQ)

FOR SERVICES

Project Title:	Finance Best Practice Consultancy Services
Nature of the services	Consultancy
Location:	Noumea, New Caledonia – Suva, Fiji
Date of issue:	21/07/2023
Closing Date:	6/08/2023
SPC Reference:	RFQ23-5542

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Part 1: INTRODUCTION

1.1 About the Pacific Community (SPC)

The Pacific Community (SPC) is the principal scientific and technical organisation of the Pacific region, established by treaty in 1947 with the signing of the *Agreement Establishing the South Pacific Commission* (the Canberra Agreement).

Our unique organisation covers more than 20 sectors and is renowned for knowledge and innovation in such areas as fisheries science, public health surveillance, geoscience and conservation of plant genetic resources for food security.

For more information about SPC and the work that we do, please visit our website: <https://www.spc.int/>.

1.2 SPC's procurement activities

SPC's procurement activities are guided by the principles of high ethical standards, value for money, open competition and social and environmental responsibility and are carried out under our Procurement Policy.

For further information or enquiries about SPC's procurement activities, please visit the procurement pages on our website: <https://www.spc.int/procurement> or email: procurement@spc.int

1.3 SPC's Request for Quotation (RFQ) Process

At SPC, procurement valued at more than EUR 2,000 and less than or equal to EUR 45,000 requires an evaluation of at least three quotations to determine the offer that provides the best value for money through a Request for Quotation (RFQ) process.

This RFQ sets out SPC's requirements for a project and it asks you, as a bidder, to respond in writing in a prescribed format with pricing and other required information.

Your participation confirms your acceptance of SPC's conditions of participation in the RFQ process.

Part 2: INSTRUCTIONS TO BIDDERS

2.1 Background

SPC invites you to submit a quotation to deliver the services as specified in [Part 3](#).

SPC has compiled these instructions to guide prospective bidders and to ensure that all bidders are given equal and fair consideration. Please read the instructions carefully before submitting your bid. For your quotation to be considered, it is important that you provide all the prescribed information by the closing date and in the format specified.

2.2 Submission Instructions

You must **submit your quotation and all supporting documents** in English and as an attachment to an email sent to betty@spc.int and procurement@spc.int and with the subject line of your email as follows: **Submission RFQ23-5542 – Finance Best Practice Consultancy Services**. The email should also be copied to rfq@spc.int.

The supporting documents expected in this RFQ are:

- [The Conflict-of-Interest Declaration form](#) completed
- A technical memo including:

- A description of the content of the proposed service and the methodology you wish to use;
- A description of work of similar nature;
- Your CV or professional profile;
- A cover letter;
- The tentative schedule including information listed in the Timelines section of the Terms of Reference below;
- Any other document to support your proposal.
- Your quote in EUR filled on the provided Price Schedule (excel document).

Your submission must be clear, concise and complete and should only include a quotation and information that is necessary to respond effectively to this RFQ. Please note that you may be marked down or excluded from the procurement exercise if your submission contains any ambiguities or lacks clarity.

Bids will be evaluated on the basis of information received by **8 pm, Noumea Time on 6/08/2023**.

2.3 Evaluation & Contract Award

Each quotation validly received will be assessed against the evaluation criteria matrix set out in [Part 4](#). Any changes in the evaluation criteria will result in the RFQ process being re-issued.

SPC may award the contract once it has determined that a bidder has met the prescribed requirements and the bidder's proposal has been determined to be substantially responsive to the RFQ documents, provide the best value for money (highest cumulative score) and best serve the interests of SPC.

In the event of a bid being accepted, procurement will take place under SPC's [General Terms and Conditions of Contract](#) and depending on the value or nature of the procurement, the award will be made by issuing a purchase order or a signed and dated contract, or both.

2.4 Key Contacts

Please contact SPC should you have any doubt as to what is required or if we can help answer any questions that you may have.

Betty Manieva, Process Improvement and Internal Controls Adviser will be your primary point of contact for this RFQ and can be contacted at bettymanieva@spc.int. You should copy any communications into rfq@spc.int.

Details will be kept of any communications between SPC and bidders. This assists SPC to ensure transparency of the procurement process. While SPC prefers written communication in the RFQ process, at any point where there is phone call or other conversation, SPC expects to keep a file note of the exchange, with all forms of communication with prospective bidders to be retained as source documents for the procurement of the services.

2.5 Key Dates

Please see the proposed procurement timetable in the table below. This timetable is intended as a guide only and while SPC does not intend to depart from the timetable, it reserves the right to do so at any stage.

STAGE	DATE
RFQ sent to potential vendors	21/07/2023
RFQ Closing Date	6/08/2023

2.6 Legal and compliance

Confidentiality: Unless otherwise agreed by SPC in advance or where the contents of the RFQ are already in the public domain when shared with the bidder, bidders shall at all times treat the contents of the RFQ and any related documents as confidential. SPC will also treat the information it receives from the bidders as confidential.

Conflict of interest: Bidders must take all necessary measures to prevent any situation of conflict of interest. You must notify SPC in writing as soon as possible of any situation that could constitute a conflict of interest during the RFQ process. If you have any familial connection with SPC staff, this must be declared, and approval will then be sought for you to engage in the RFQ process. **In support of your response to this RFQ, you must submit to SPC [the Conflict-of-Interest Declaration form](#) available on our procurement page website: <https://spc.int/procurement>.**

Breach of this requirement can result in SPC terminating any contract with a successful bidder.

Currency, validity, duties, taxes: Unless specifically otherwise requested, all proposals should be in EURO and must be net of any direct or indirect taxes and duties, and shall remain valid for 120 days from the closing date. The successful bidder is bound by their proposal for a further 60 days following notification they are the preferred bidder so that the contract may be awarded. No price variation due to escalation, inflation, fluctuation in exchange rates, or any other market factors shall be accepted at any time during this period.

No offer of contract or invitation to contract: This RFQ is not an offer to contract or an invitation by SPC to enter into a contract with you.

Privacy: The bidder is to comply with the requirements of applicable legislation and regulatory requirements in force for the use of personal data that is disclosed for the purposes of this RFQ. SPC will handle any personal information it receives under the RFQ in line with its [Privacy Policy](#), and the [Guidelines for handling personal information of bidders and grantees](#).

Warranty, representation, assurance, undertaking: The bidder acknowledges and agrees that no person has any authority to give any warranty, representation, assurance or undertaking on behalf of SPC in connection with any contract which may (or may not) follow on from this RFQ process.

2.7 Complaints process

Bidders that consider they were not treated fairly during any SPC procurement process may lodge a protest. The protest should be addressed to complaints@spc.int. The bidder must provide the following information: (1) full contact details; (2) details of the relevant procurement; (3) reasons for the protest, including how the alleged behaviour negatively impacted the bidder; (4) copies of any documents supporting grounds for protest; (5) the relief that is sought.

Part 3: TERMS OF REFERENCE

A. Background/context

SPC is an intergovernmental organisation owned and governed by our 27 country and territory members. The Pacific Community Governance Arrangements sets out the administrative practices of governance in the organisation, which includes the Finance Regulations and Finance Policies.

Finance services are delivered through two mechanisms, a central finance unit within the Operations and Management Directorate and through separate finance teams within divisions. SPC has eight technical divisions. The divisions are based across two locations, the headquarters in Noumea, New Caledonia and the regional office in Suva, Fiji. Three divisions are based in Noumea, 4 in Suva, and one across both locations. The central finance team also operates across the two locations.

SPC recently implemented a shared services approach to the delivery of finance services. This change is driven by the desire to have all finance teams work more collaboratively and consistently and to increase sharing in knowledge, tools, and resources.

The finance shared services vision is to create an accountable and motivated team of experts working in an enabling culture, to share best practices and consistently provide compliant, efficient, and solution-oriented services to support SPC program delivery.

The successful completion of this consultancy will go towards fulfilling the vision of finance shared services.

B. Purpose, objectives, scope of services

We seek an experienced finance services consultant(s) to complete the following deliverables.

- i) Write a report, including a high-level executive summary, on financial management requirements donors have of SPC as a project fund recipient. The report must include the following areas.
 - Current SPC practices
 - Analysis of gaps and inconsistencies in SPC practices
 - Recommendations on best practice for SPC adoption

The recommendations should reflect a good understanding of the SPC operating environment. The report may be in any digital form. It should be around 6000 words.

- ii) Write a report on the requirements SPC would have to meet for two of its donors, the European Union, and the World Bank, to accept “budgeting for service” as a valid budgeting and expenditure approach as part of its suite of best practices. SPC seeks to introduce the practice of budgeting for service, which means finance staff costs are budgeted and charged to donor funded projects on the basis of service needed and provided rather than having full time finance project staff. The report may be in any digital form. It should be around 1000 words.

In order to complete the first deliverable on financial management requirements, the consultant(s) is expected to undertake the following activity:

- i) Collate and analyse SPC practices on financial management requirements as it relates to projects and programmes funded by donors, against the requirements donors have of SPC as a fund

recipient. This would include reviewing project donor funding agreements and correspondence and conducting interviews and or workshop consultations.

In order to complete deliverable 2, the consultant(s) is expected to undertake the following activity:

- i) Conduct research and analysis into “budgeting for service” requirements donors would have of SPC as a fund recipient. Sources of information would include donor organisations, in particular the EU and World Bank, international development sources and the SPC EU Project Management Unit.

The scope of deliverable 1 is limited as follows:

- i) The full complement of SPC donors will not be covered. This work is limited to the European Union, the World Bank, Green Climate Fund (GCF), and the Asian Development Bank (ADB).
- ii) The full range of donor financial management requirements will not be covered. This work is limited to:
 - o Expense validation or eligibility - the requirements donors expect SPC to meet to confirm the validity of expense items for projects or programs they fund or co-fund. Major direct expense items are staff costs, travel and workshop, grants, cost recoveries and consultancies. Other expense items of note are foreign exchange differences, indirect cost recoveries and the treatment of expenditure outside the project period.
 - o Financial reporting – the obligations donors expect SPC to meet when performing financial reports, including the information and analysis expected.

Interviews or group consultations should be conducted with key staff members to elicit information for the activities for deliverable one. At a minimum, the following personnel should be consulted. Eight divisional finance team leaders, two senior accountants in the central OMD team, and finance officers according to the numbers in the donor portfolio table below. The consultations could be in a workshop, individual interviews, or a combination of both. In addition, it is expected that there will be an inception meeting and closing meeting as well as weekly catch-up meetings with the SPC project focal point, the Process Improvements and Internal Controls Adviser.

Donor	No. of projects	Average project value EUR	No. project finance officers to interview
European Union	14	7.5M	4 + 1 EU Project Management Office staff member
World Bank	5	3M	2
GCF	2	7M	1
ADB	1	3M	1

Administrative support will be provided by SPC, including the organisation of interviews and workshops, taking minutes, report or presentation preparation support if required, and making travel arrangements.

C. Timelines

The consultant must attach to his quotation a tentative schedule of the proposed service. This schedule must include at least the following elements:

- The phases of each activity and deliverable listed in the terms of reference and the schedule of payments.
- The phases of development of the deliverables.
- The phases of travel and on-site interviews / workshop collaborations.

The number of man-days envisaged per phase must be specified.

D. Reporting and contracting arrangements

A kick-off meeting will be scheduled at the beginning of the contract (face to face or remotely) with the consultant, the Process Improvements and Internal Controls Adviser, and the Finance Director in order to:

- Clarify (if necessary) and formalise the technical and geographical scope of the service.
- Approve the schedule, in particular with regard to travel and the information gathering phase.
- Define the list of information / documents to be provided by the SPC.
- Confirm understanding of the list of expected deliverables and associated deadlines.
- Define the administrative support required by the consultant.

The consultant will be responsible to the Process Improvements and Internal Controls Adviser for daily work and planning and is expected to report on progress each week.

The consultant will be responsible to the Finance Director for the deliverables.

A project closing meeting will be held to present at least:

- The final deliverables and how closely they meet the requirements of these terms of reference.
- Any suggestions on future training or other actions related to the deliverables.
- Any difficulties encountered and lessons to learn.

E. Skills and qualifications

- Degree in a finance, business, or a relevant humanities discipline. Master or advanced degree the same or equivalent experience.
- Certification in project management or relevant experience.
- Demonstrated track record over at least 10 years of:
 - Conducting research of multiple sources on financial practices such as donor financial management requirements.
 - Curating and collating best practice documentation in finance across multiple settings on time and on budget.
- Demonstrated experience in the following:
 - Major donor financial management requirements expertise.
 - Working in or for an intergovernmental organisation like SPC.
 - Working in the Pacific and with people from different cultural backgrounds.
 - Conducting an interview and information gathering workshop.
 - Report writing.
- Experience in a finance shared services environment or involvement in a restructure of support services would be an advantage.

- Fluency in English. Fluency in French would be an advantage.

In the case where the consultant would call upon complementary competences or subcontracting to carry out the service, the details must be included in the technical proposal, including how this would be organised and the profiles of the other members of the team.

F. Scope of Bid Price and Schedule of Payments

The quotation will be submitted according to the format proposed in the appendix. Should the bidder wish to make any changes to the quotation, the bidder must contact SPC to specify the additions they wish to make.

The consultant must specify in his offer the costs associated with travel to Noumea and/or Suva. SPC will pay to the consultant a daily per diem of FJD \$560 in Suva and XPF 25000 in Noumea for any travel to these locations. The per diem covers accommodation, meals, and incidentals. All travel costs of per diem, airfares and airport transfers would not form part of the consultant's bid price. These are additional costs that SPC will cover. Any other travel costs such as travel insurance and visa processing fees are paid by the consultant.

Milestone/deliverables	% payment
Contract signature & kick off meeting (advance payment)	20%
Delivery and acceptance of draft of Deliverable 1 report	20%
Delivery and acceptance of draft of Deliverable 2 report	20%
Delivery and acceptance of final of Deliverable 1 and 2 reports	20%
Closing project meeting	20%
TOTAL	100%

Part 4: PROPOSAL EVALUATION MATRIX

4.1 Competency Requirements & Score Weight

The evaluation matrix below reflects the obtainable score specified for each evaluation criterion (technical requirement) which indicates the relative significance or weight of the items in the overall evaluation process.

Evaluation criteria	Score Weight (%)	Points obtainable
Mandatory requirements / documents		
1) Your Declaration of conflict of interest 2) A technical memo including: <ul style="list-style-type: none"> • A description of the content of the proposed service and the methodology you wish to use; • A description of work of similar nature; • Your CV or professional profile; • A cover letter; • The tentative schedule including information listed in the Timelines section of the Terms of Reference below; 3) Your quote in EUR filled on provided Price Schedule		Mandatory requirements. Bidders will be disqualified if any of the requirements are not met
Technical requirements		
Presentation quality of the offer: The writing and presentation quality of the technical proposal, and all supporting documentation.	10 %	100
Methodology & Feasibility: Actions envisaged; proposed means and modalities of implementation; how methodology will support deliverables; proposed schedule, etc.	20 %	200
Skills and qualifications: Degree in a finance, business, or a relevant humanities discipline; Certification in project management or relevant experience. Fluent in English (writing & speaking), French desirable.	15 %	150
Experiences: Demonstrated track record over at least 10 years of conducting research of multiple sources on donor financial management practices & collating best practice documentation in finance across multiple settings on time and on budget, demonstrated experience in major donor expertise, intergovernmental organisation, working in the Pacific and with people from different cultural backgrounds and experience in a finance shared services environment.	25 %	250
Financial proposal: Your quote	30 %	300
Total Score	100%	1000

The Finance Department reserves the right to request an interview with the consultants after analysis of the proposals submitted, in order to evaluate in person or remotely some of the required skills and qualifications.

These meeting requests will be sent by Procurement and Finance, according to the tentative schedule proposed in §2.5