



**REQUEST FOR PROPOSAL (RFP)  
(For Low-Valued Services)**

<b>To: Interested Bidders</b>	<b>DATE: May 20, 2020</b>
	<b>REFERENCE: RFP/BPPS/2020/2509– Inventory of IATI Training Materials and Data Use Tools</b>

Dear Sir / Madam:

We kindly request you to submit your Proposal for **RFP/BPPS/2020/2509– Inventory of IATI Training Materials and Data Use Tools**. Please be guided by the form attached hereto as Annex 2, in preparing your proposal.

Proposals may be submitted on or before **10 June 2020** via email to [margarita.bernado@undp.org](mailto:margarita.bernado@undp.org) indicating the below references in the subject of the emails. Proposals sent to other UNDP email addresses will not be accepted and the Purchaser will not be responsible for the confidentiality of such offer.

Your Proposal must be expressed in the **English language**, and valid for a minimum period of 120 days.

**Proposers must take into account the following:**

Proposers must indicate the below in the e-mail subject box while submitting the Technical proposal and other documents related to this bid:

Technical Proposal (items A, B and C of Annex 2). *RFP/BPPS/2020/2509– Inventory of IATI Training Materials and Data Use Tools*

Proposers must indicate the below in the e-mail subject box while submitting the Financial proposal:

Financial Proposal (items D and E of Annex 2). *RFP/BPPS/2020/2509– Inventory of IATI Training Materials and Data Use Tools*

**(Both financial and technical proposals must be submitted as separate files).**

Upon finalizing the technical evaluation, only technically qualified bidders will be requested to provide the password of the financial proposal. The technically qualified proposers will have 24 hours to respond to UNDP's request for the password.

**Proposers may send as many e-mails as needed; however, the size of each e-mail should not exceed seven megabytes (7 MB).** As an e-mail can take some time to arrive after it is sent, we advise all Proposers to send e-mail submissions well before the deadline. Proposers are solely responsible for ensuring that any and all files sent to UNDP are readable, that is, uncorrupted, in the indicated electronic format, and free from viruses and malware. Failure to provide readable files will result in the proposal being rejected.

In the course of preparing your Proposal, it shall remain your responsibility to ensure that it reaches the address above on or before the deadline. Proposals that are received by UNDP after the deadline indicated above, for

whatever reason, shall not be considered for evaluation. Kindly ensure that your proposal documents are signed and in the .pdf format, and free from any virus or corrupted files.

Services proposed shall be reviewed and evaluated based on completeness and compliance of the Proposal and responsiveness with the requirements of the RFP and all other annexes providing details of UNDP requirements.

The Proposal that complies with all of the requirements, meets all the evaluation criteria and offers the best value for money shall be selected and awarded the contract. Any offer that does not meet the requirements shall be rejected.

Any discrepancy between the unit price and the total price shall be re-computed by UNDP, and the unit price shall prevail, and the total price shall be corrected. If the Service Provider does not accept the final price based on UNDP's re-computation and correction of errors, its Proposal will be rejected.

No price variation due to escalation, inflation, fluctuation in exchange rates, or any other market factors shall be accepted by UNDP after it has received the Proposal. At the time of Award of Contract or Purchase Order, UNDP reserves the right to vary (increase or decrease) the quantity of services and/or goods, by up to a maximum twenty-five per cent (25%) of the total offer, without any change in the unit price or other terms and conditions.

Any Contract or Purchase Order that will be issued as a result of this RFP shall be subject to the General Terms and Conditions attached hereto. The mere act of submission of a Proposal implies that the Service Provider accepts without question the General Terms and Conditions of UNDP, herein attached as Annex 3.

Please be advised that UNDP is not bound to accept any Proposal, nor award a contract or Purchase Order, nor be responsible for any costs associated with a Service Providers preparation and submission of a Proposal, regardless of the outcome or the manner of conducting the selection process.

UNDP's vendor protest procedure is intended to afford an opportunity to appeal for persons or firms not awarded a Purchase Order or Contract in a competitive procurement process. In the event that you believe you have not been fairly treated, you can find detailed information about vendor protest procedures in the following link: <http://www.undp.org/content/undp/en/home/operations/procurement/business/protest-and-sanctions.html>

UNDP encourages every prospective Service Provider to prevent and avoid conflicts of interest, by disclosing to UNDP if you, or any of your affiliates or personnel, were involved in the preparation of the requirements, design, cost estimates, and other information used in this RFP.

UNDP implements a zero tolerance on fraud and other proscribed practices, and is committed to preventing, identifying and addressing all such acts and practices against UNDP, as well as third parties involved in UNDP activities. UNDP expects its Service Providers to adhere to the UN Supplier Code of Conduct found in this link: [https://www.un.org/Depts/ptd/sites/www.un.org.Depts.ptd/files/files/attachment/page/pdf/unsc/conduct\\_english.pdf](https://www.un.org/Depts/ptd/sites/www.un.org.Depts.ptd/files/files/attachment/page/pdf/unsc/conduct_english.pdf)

Thank you and we look forward to receiving your Proposal.

Sincerely yours,

*margaret thomas*

Margaret Thomas  
Chief, Effectiveness Group  
Bureau for Policy and Programme Support

**ANNEX 1****Description of Requirements**

Context of the Requirement	UNDP/IATI is seeking to contract a service provider who has the capacity to create an inventory of available training materials around use of IATI data, and also conduct a gap analysis to understand what materials could be created to supplement the available resources from the data user perspective.
Implementing Partner of UNDP	Direct Implementation
Brief Description of the Required Services	Under the guidance of the IATI Data Use Working Group and under the supervision of the IATI Secretariat Coordinator and Outreach and Partnerships Specialist, the contractor is expected to: <ol style="list-style-type: none"> <li>1. Develop a detailed inception report and implementation plan to create the inventory of trainings, materials, and tools;</li> <li>2. Deliver a draft of the inventory for review by the IATI Secretariat and Data Use Working Group; and</li> <li>3. Prepare a detailed final report as described in the Terms of Reference (Annex 3).</li> </ol>
List and Description of Expected Outputs to be Delivered	Please refer to the Terms of Reference (Annex 3)
Person to Supervise the Work/Performance of the Service Provider	Outreach and Partnerships Specialist, under the overall supervision of the IATI Secretariat Coordinator.
Frequency of Reporting	The proposed contractor is expected to be in regular contact with the Outreach and Partnerships Specialist to provide progress updates as well as discuss and agree on the approach to resolve unforeseen challenges that may arise.
Progress Reporting Requirements	Official progress reports are not required. However, the proposed contractor is expected to be in regular contact with the Outreach and Partnerships Specialist communicate progress and agree how to overcome any challenges or delays. Any issue that poses a risk to contract delivery must be submitted in writing in a timely manner in order for UNDP to plan and prepare any contingency plans to mitigate the risk of non-delivery of outputs.
Location of work	At Contractor's Location
Expected duration of work	10 weeks
Target start date	24 June 2020
Latest completion date	7 September 2020
Travel Expected	Not Applicable
Special Security Requirements	Standard security requirements apply, that are governed by the local and international laws.
Facilities to be Provided by UNDP (i.e., must be excluded from Price Proposal)	Not applicable. Contractor is expected to have access to communication equipment and facilities to deliver the assignment. All associated costs shall be reflected in the financial proposal.
Implementation Schedule indicating breakdown and timing of activities/sub-activities	Required as part of the technical proposal.

Names and curriculum vitae of individuals who will be involved in completing the services	Required			
Currency of Proposal	United States Dollars			
Value Added Tax on Price Proposal	Must be exclusive of VAT and other applicable indirect taxes			
Validity Period of Proposals (Counting for the last day of submission of quotes)	<input checked="" type="checkbox"/> 120 days In exceptional circumstances, UNDP may request the Proposer to extend the validity of the Proposal beyond what has been initially indicated in this RFP. The Proposal shall then confirm the extension in writing, without any modification whatsoever of the Proposal.			
Partial Quotes	Not Permitted			
Payment Terms	Outputs	Percent	Timing	Condition for Payment Release
	Delivery of the work and outputs as defined in the Terms of Reference (TOR) - Annex 3, and approval of the IATI Outreach and Partnerships Specialist	100%	After completion of the assignment	Within thirty (30) days from the date of meeting the following conditions: a) UNDP's written acceptance (i.e., not mere receipt) of the quality of the outputs; and b) Receipt of invoice from the Service Provider.
Person(s) to review/inspect/ approve outputs/completed services and authorize the disbursement of payment	IATI Outreach and Partnerships Specialist			
Type of Contract to be Signed	<input checked="" type="checkbox"/> Purchase Order <input checked="" type="checkbox"/> Contract for Goods and/or Services			
Criteria for Contract Award	<input checked="" type="checkbox"/> Highest Combined Score (based on the 70% technical offer and 30% price weight distribution) <input checked="" type="checkbox"/> Full acceptance of the UNDP Contract General Terms and Conditions (GTC). This is a mandatory criteria and cannot be deleted regardless of the nature of services required. Non-acceptance of the GTC may be grounds for the rejection of the Proposal.			
Criteria for the Assessment of Proposal	<p><b><u>Technical Proposal (70%) (Minimum pass score is 49 out of 70 total obtainable)</u></b>            Proposals will be evaluated separately and based on the below criteria.</p> <p><b><u>Qualifications of Company (40 Pts)</u></b></p> <ul style="list-style-type: none"> <li>• 5+ years' experience in knowledge management or organizational development and learning;</li> <li>• Expert knowledge in creating knowledge products for diverse audiences (government, UN agencies, civil society, etc.);</li> <li>• Proven expertise in qualitative research / scoping, including through desk reviews, interviews, etc.</li> </ul>			

	<p><b><u>Approach and Proposed Methodology (15 Pts)</u></b></p> <ul style="list-style-type: none"> <li>• Description of how the company will go about capturing existing IATI training materials and tools, such as online searches or questionnaires / dedicated outreach to the IATI community, etc., and how the gap analysis will be conducted.</li> </ul> <p><b><u>Qualifications of Key Personnel (15 Pts)</u></b></p> <p>The <b>Team Leader</b> should have the following qualifications and experience:</p> <p><b>Education:</b></p> <ul style="list-style-type: none"> <li>• Masters’ degree or higher in Public Administration, International Development, Law, Political Science, Human Rights, IT, Humanitarian Assistance or related field.</li> </ul> <p><b>Experience:</b></p> <ul style="list-style-type: none"> <li>• At least 7 years’ experience in knowledge management or organizational development and learning.</li> <li>• Strong knowledge of IATI and the open data / transparency agendas.</li> <li>• Proven experience with qualitative research, including through desk reviews, interviews, etc.</li> </ul> <p><b>Language:</b></p> <ul style="list-style-type: none"> <li>• Excellent oral and written communication skills in English are required. Knowledge of French would be an asset.</li> </ul> <p><i>Bidders may offer additional personnel (for research and support work, for example) in their proposal. While UNDP expects that the scope for the assignment can be delivered, bidders may offer more experts in their proposal. Those personnel need to meet the requirements for the assignment.</i></p> <p><b><u>Financial Proposal (30%)</u></b> Only bidders which get a minimum of 49 points on the technical evaluation will be found technically responsive and considered for the financial evaluation.</p> <p>To be computed as a ratio of the Proposal’s offer to the lowest price among the proposals received by UNDP.</p> <p>FP Rating = (Lowest Priced Offer / Price of the Offer Being Reviewed) x 100</p> <p><b><u>Total Combined Score:</u></b>          (TP Rating) x (Weight of TP, e.g. 70%)          + (FP Rating) x (Weight of FP, e.g. 30%)</p> <p><b><u>Total Combined and Final Rating of the Proposal</u></b></p>
<p>UNDP will award the contract to:</p>	<p>One company or university.</p> <p>Any proposer can submit an offer however a proposer cannot submit at the same time its own proposal and be a subcontractor with another proposer. This situation will raise a conflict of interest.</p> <p>However, two or more companies can form an association and submit one proposal. In this case, the companies have to select a leading company amongst them and with whom will sign the contract with UNDP.</p>

Contract General Terms and Conditions <sup>1</sup>	<p>General Terms and Conditions for de minimis contracts</p> <p>Applicable Terms and Conditions are available at:  <a href="http://www.undp.org/content/undp/en/home/procurement/business/how-we-buy.html">http://www.undp.org/content/undp/en/home/procurement/business/how-we-buy.html</a></p>
Annexes to this RFP	<p><input checked="" type="checkbox"/> Form for Submission of Proposal (Annex 2)</p> <p><input checked="" type="checkbox"/> Detailed TOR (Annex 3)</p> <p><input checked="" type="checkbox"/> General Terms and Conditions</p>
Contact Person for Inquiries (Written inquiries only) <sup>2</sup>	<p><i>Focal Person in UNDP: Anna Whitson, IATI Outreach and Partnerships Specialist</i>  <i>Email address: anna.whitson@undp.org</i></p> <p>Last day to submit questions to UNDP is 7 days before the submission date. UNDP will provide responses on a rolling basis for each.</p> <p>Any delay in UNDP's response shall be not used as a reason for extending the deadline for submission, unless UNDP determines that such an extension is necessary and communicates a new deadline to the Proposers.</p>

<sup>1</sup> Service Providers are alerted that non-acceptance of the terms of the General Terms and Conditions (GTC) may be grounds for disqualification from this procurement process.

<sup>2</sup> This contact person and address is officially designated by UNDP. If inquiries are sent to other person/s or address/es, even if they are UNDP staff, UNDP shall have no obligation to respond nor can UNDP confirm that the query was received.

**ANNEX 2**

**FORM FOR SUBMITTING SERVICE PROVIDER'S PROPOSAL<sup>3</sup>**

***(This Form must be submitted only using the Service Provider's Official Letterhead/Stationery<sup>4</sup>)***

[insert: Location].  
[insert: Date]

To: [insert: Name and Address of UNDP focal point]

Dear Sir/Madam:

We, the undersigned, hereby offer to render the following services to UNDP in conformity with the requirements defined in the RFP dated [specify date] , and all of its attachments, as well as the provisions of the UNDP General Contract Terms and Conditions:

**A. Qualifications of the Service Provider**

*The Service Provider must describe and explain how and why they are the best entity that can deliver the requirements of UNDP by indicating the following:*

- a) Profile – describing the nature of business, field of expertise, licenses, certifications, accreditations;*
- b) Business Licenses – Registration Papers, Tax Payment Certification, etc.*
- c) Latest Audited Financial Statement – income statement and balance sheet to indicate its financial stability, liquidity, credit standing, and market reputation, etc.;*
- d) Track Record – list of clients for similar services as those required by UNDP, indicating description of contract scope, contract duration, contract value, contract references;*
- e) Certificates and Accreditation – including Quality Certificates, Patent Registrations, Environmental Sustainability Certificates, etc.*
- f) Written Self-Declaration that the company is not in the UN Security Council 1267/1989 List, UN Procurement Division List or Other UN Ineligibility List.*

**B. Proposed Methodology for the Completion of Services**

*The Service Provider must describe how it will address/deliver the demands of the RFP; providing a detailed description of the essential performance characteristics, reporting conditions and quality assurance mechanisms that will be put in place, while demonstrating that the proposed methodology will be appropriate to the local conditions and context of the work.*

<sup>3</sup> This serves as a guide to the Service Provider in preparing the Proposal.

<sup>4</sup> Official Letterhead/Stationery must indicate contact details – addresses, email, phone and fax numbers – for verification purposes

**C. Qualifications of Key Personnel**

*If required by the RFP, the Service Provider must provide:*

- a) *Names and qualifications of the key personnel that will perform the services indicating who is Team Leader, who are supporting, etc.;*
- b) *CVs demonstrating qualifications must be submitted if required by the RFP; and*
- c) *Written confirmation from each personnel that they are available for the entire duration of the contract.*

**D. Cost Breakdown per Deliverable\***

Outputs	Price Per Output in USD
Total	USD

**E. Cost Breakdown by Cost Component [This is only an Example]:**

Description of Activity	Remuneration per Unit of Time	Total Period of Engagement/ Unit price*	No. of Personnel	Total Rate in USD
<b>1. Key Personnel</b>				
1- Team Leader				
<b>2. Other experts (indicate the cost for each personnel separately:</b>				
# proposed				
<b>II. Other Costs (As applicable)</b>				
<b>Travel (city location, purpose)</b>				
Round trip tickets				
Allowances				
Communications				
Others (kindly specify)				
<b>Total Price in USD</b>				<b>USD</b>

*[Name and Signature of the Service Provider's Authorized Person]*

*[Designation]*

*[Date]*



## ANNEX 3

### TERMS OF REFERENCE Inventory of IATI Training Materials and Data Use Tools

#### Background:

The [International Aid Transparency Initiative \(IATI\)](#) is a voluntary, multi-stakeholder initiative that seeks to increase the transparency of development cooperation and humanitarian activities and increase their effectiveness in tackling poverty and achieving the Sustainable Development Goals. IATI was launched at the Third High Level Forum on Aid Effectiveness in Accra in 2008 and was designed to support donors in meeting their Accra commitments on transparency and simultaneously serve the information needs of developing countries to enable the planning and management of national budgets based on more accurate and timely information on resource flows.

Since then, the IATI community has expanded considerably, bringing together donor and recipient countries, civil society organisations, and other experts in aid information. At the centre of IATI is the IATI Standard, a format and framework for publishing data on development cooperation and humanitarian activities.

The initiative is governed by a multi-stakeholder Governing Board, elected by the Members, and the Members Assembly, formed of all members of IATI. The GB is supported administratively by a virtual Secretariat located in multiple locations and led by UNDP, which also included UNOPS and UK-based NGO Development Initiatives.

#### Context:

More than 1,100 organisations have now published data using the IATI Standard, and IATI aims to continually improve the quality of data to support stakeholders to use this information for better decision-making. While IATI has been very successful in increasing the supply of data since its launch, there is still a need to increase and diversify the usage of the data. A 2015 independent evaluation highlighted that strengthening the ‘demand side’, e.g. the use of IATI data, especially from partner countries should be a strategic priority for IATI programming.

In order to address data use challenges and implement the recommendations from the independent evaluation, in 2017 the IATI Board established a IATI Data Use Fund (DUF). The DUF is administered by UNDP on behalf of the IATI Data Use Working Group (DUWG). In 2020, the DUWG released a new workplan aligned with the objective: “Promote the systematic use of IATI data by development and humanitarian actors” in the new [IATI Strategic Plan 2020-2025](#) together with the two other objectives: improving data quality and strengthening the IATI Standard. The new workplan aligns data use activities to five objectives:

1. Improve data quality and usability of IATI data in order to assure users of its reliability.
2. Improve existing tools and make new tools user friendly for multiple users
3. **Improve guidance, training and support for specific user groups, leading to greater confidence in using IATI data.**
4. Promote data integration and data use (including AIMS) to promote, find, and showcase new ways of applying IATI data in planning, communication, dialogue, analysis, and reporting.
5. Raise awareness of IATI as a source of data for different user needs.

This **request for proposals (RFP)** focuses on objective 3 of the 2020 DUWG workplan, improving guidance, training, and support for specific user groups.

#### Scope of Work

There is a continual diversification of actors publishing and using IATI data, including stakeholders from government, civil society, sub-national governments, and others. As the number of actors accessing and using IATI data increases, use cases are amplified; and there is an increased probability that a training material and / or

tools already exist to support specific types of data use. However, data users may not know that materials and tools fit for purpose are already available, or how to find them. As such, UNDP/IATI is seeking to contract a service provider, who has the capacity to implement an effective small-scale activity to create an inventory of training materials and data use tools as well as analyze what materials could be created to supplement the available resources from the data user perspective. The inventory will enable data users to easily browse existing training materials, data use resources, and tools, allowing for better communication about IATI data use and avoiding duplication of efforts. The objective is for this inventory to be shared on an IATI Community Platform currently under development (i.e. an online platform capable of displaying a comprehensive resource library). This Platform will be managed by an IATI Community Facilitator who will be responsible for maintaining and updating the inventory as needed.

The service provider will both verify the current relevance of known materials and tools, such as those listed in the current IATI Tool Guide (excluding publishing tools) and conduct desk research and outreach to the wider IATI Community to identify additional materials. When a full inventory is available, the service provider will undertake a gap analysis to identify what useful trainings, materials, and tools are not yet available within the IATI community. The service provider is not requested to fill the gap, but rather communicate what materials and functions are missing. The gap analysis will identify data user groups, needs of each group, existing materials available for those needs, and gaps where needs are not being met.

The inventory collection should also include suggestions for how to maintain the inventory as a long-lasting solution. The training materials and tools collected for the inventory should be relevant to both data publishers and data users of all technical skill levels, and the product should consider user groups and technical skill levels for each material.

### **Expected Outputs and Deliverables**

The service provider is expected to deliver the following:

1. Under the guidance of the IATI Data Use Working Group and under the supervision of the IATI Outreach and Partnerships Specialist, **develop a detailed inception report and implementation plan to create the inventory of trainings, materials, and tools.** This must also clearly outline:
  - a. Methodology and timeline for capturing existing IATI training materials and tools, such as online searches or questionnaires / dedicated outreach to the IATI community;
  - b. A detailed explanation of how the inventory will be organized and presented, including a robust taxonomy;
  - c. An assessment of how the gap analysis and inventory will be organized and presented.
2. Deliver **a draft of the inventory for review by the IATI Secretariat and Data Use Working Group.** Inventory of available trainings, materials, and data tools that exist throughout the IATI Community, categorized by type, user group, and other criteria that the service provider will deem fit, including creation of a robust taxonomy of terms relevant to the materials. The first draft should also contain proposals on how the inventory can be easily maintained and updated by the IATI Secretariat, including how it could be shared most effectively in the Platform.
3. Prepare **a detailed report.** Once comments from the Data Use Working Group and IATI Secretariat are returned and incorporated, the service provider will integrate these and return a final draft containing:
  - a. Inventory table;
  - b. Recommendations relevant to the IATI Community Facilitator regarding how to revise and update the inventory; and

- c. Based on an assessment of the needs of various data user groups, an assessment of the identified gaps in training materials and tools for these data user groups.

<b>Actions / Deliverables</b>	<b>Indicative Date</b>
Inception report and implementation plan	2 weeks after contract issuance
Draft inventory and draft report	6 weeks after contract issuance
Final inventory and final report	10 weeks after contract issuance

### **Institutional Arrangements**

- The service provider will work under the guidance of the IATI Data Use Working Group, with the IATI Outreach and Partnerships Specialist as focal point for all matters.
- The service provider will be responsible for providing software and other equipment to be used. Access to the Community Platform will be made available at no cost.
- Payments will be made upon submission of the deliverables with approval and confirmation by UNDP.

### **Competencies**

#### **Functional Competencies of the Lead Expert**

- Excellent organizational and time-management skills; ability to work independently against tight deadlines;
- Proven proficiency in the usage of online research and facilitation tools;
- Excellent writing, editing and oral communication skills.

#### **Corporate Competencies**

- Demonstrates integrity by modelling the UN's values and ethical standards;
- Promotes the vision, mission, and strategic goals of UNDP, IATI and partner organizations;
- Displays cultural, gender, religion, race, nationality and age sensitivity and adaptability.

### **Required qualifications and experience of lead technical expert**

#### **Education**

- Masters' degree or higher in Public Administration, International Development, Law, Political Science, Human Rights, IT, Humanitarian Assistance or related field.

#### **Experience**

- At least 7 years' experience in knowledge management or organizational development and learning.
- Expert knowledge related to IATI, open data and / or transparency;
- Expert knowledge in creating knowledge products for diverse audiences (government, civil society, etc.);
- Extensive knowledge management and / or organizational learning expertise;
- Proven expertise in qualitative research, including through desk reviews, interviews, etc.

#### **Language**

- Excellent oral and written communication skills in English are required. Knowledge of French would be an asset.