



**The United Nations Development Programme
Request for Proposal (RFP)
for
Knowledge Strategy and IT Technical Advisory Services**

**United Nations Development Programme
Knowledge Management Group
Bureau for Development Policy
304 East 45th Street
New York, NY 10017
USA**



Request for Proposal (RFP)

Date: October 15, 2009

Dear Sir/Madam,

Subject: RFP for the Provision of Consultancy Services in Knowledge Strategy and IT Technical Advisory Services through a Long Term Arrangement with UNDP

1. You are invited to submit a proposal for the provision of Consultancy Services in Knowledge Strategy and IT Technical Advisory Services through a Long Term Agreement (LTA) as outlined in this Chapter and according to the Instructions, Conditions and Terms of Reference (TOR, Annex II), to support the implementation of a Knowledge Management Strategy at the United Nations Development Programme (UNDP). The future engagements of external resources will be based on LTA framework contracts defining the applicable rates of the resources deployed.
2. These LTA contracts will be based on this RFP, with the immediate effective date after the completion of the RFP process. UNDP will select a number of Offerors for these types of services, and award LTA framework contracts to them. Whenever there is an identified need for specific work, each LTA contract holder will be sent the specific Terms of Reference for the work, and the work will be awarded on the basis of competitive evaluation of the proposals submitted at that time.
3. UNDP's intention through this RFP is to develop a roster of consulting companies from which to draw resources whenever there is a need to augment existing internal resources. Offerors should note that the signing of an LTA pursuant to this RFP may confer preferred vendor status on their company, but even after being awarded the LTA there is no guarantee that the Offeror will receive any work. The LTA is described at paragraph 25 and a model LTA is attached as Annex V.
4. Offerors may apply to one or more of the three Service Lines in this RFP. A successful application in one Service Line will neither assist nor jeopardize an Offeror's application in another Service Line.
5. To enable you to submit a proposal, attached are:
 - i. Instructions to Offerors(Annex I)
 - ii. Terms of Reference (TOR)(Annex II)
 - iii. Proposal Submission Form(Annex III)
 - iv. Financial Proposal/Rate card.....(Annex IV)
 - v. Model Long Term Agreement.....(Annex V)
 - vi. General Conditions of Contract(Annex VI)
6. Your offer comprising of technical proposal and financial proposal (rate card), in separate sealed envelopes, should reach the following address no later than **Friday, 30 October 2009 at 5:00 PM New York time**:

Attention: Ms Annelise Parr
KM Project Officer
Bureau for Development Policy
United Nations Development Programme
304 East 45th St, FF-10
New York, NY 10017
annelise.parr@undp.org

7. If you request additional information, we will endeavor to provide information expeditiously, but any delay in providing such information will not be considered a reason for extending the submission date of your proposal.
8. You are requested to acknowledge receipt of this letter and to indicate whether or not you intend to submit a proposal.

Yours sincerely,

Gabriel Accascina, Director,
Knowledge Management Group,
Bureau for Development Policy, UNDP

Instructions to Offerors

A. Introduction

UNDP is the UN's global development network, advocating for change and connecting countries to knowledge, experience and resources to help people build a better life. We are on the ground in 166 countries, working with them on their own solutions to global and national development challenges. As they develop local capacity, they draw on the people of UNDP and our wide range of partners, including from the private sector. Additional information about UNDP's mandate and vision statement can be found at the public website: www.undp.org

1. General Purpose of RFP

The Knowledge Management Group, Bureau for Development Policy at UNDP has developed a corporate Knowledge Strategy to service its Strategic Plan goals and results. The strategy has at its core a social networking system which draws people together into interactive spaces to share knowledge, advice and experience, resulting in communities based on expertise, vision, ideas and personal relations. It focuses on three pillars – People, Projects, and Services – by providing spaces for:

- Staff and experts to capture their work (“People”),
- Operational activities, programmes and projects (“Projects”), and
- Services and knowledge assets, organised by themes (“Services”).

This solution, known as **Teamworks**, takes advantage of UNDP's experience in communities of practice and its approach to knowledge management, and couples it with social networking concepts. A prototype system has been developed and released for use by staff and invited external users and has been extensively tested

Within this context, UNDP now wishes to establish a long-term arrangement for a minimum period of two years with one or more highly qualified consultancy firms to provide timely assistance and/or technical support in the realization of UNDP's Knowledge Strategy. Firms are invited to submit proposals to provide services in one or more of the Service Lines below:

Service Line 01. Change Management and Business Process Re-engineering

Change management: supporting change in office practices, institutional structures, roles and responsibilities across UNDP at the country office, regional and headquarters levels, to develop a new culture of knowledge sharing in line with the goals articulated in the Knowledge Strategy 2009-2011, as well as to develop a roll-out plan and communication strategy for a phased implementation of UNDP's Teamworks platform.

Business process re-engineering: business process analysis, design and change implementation with a focus on process simplification to improve effectiveness and efficiency in the practice of knowledge management in UNDP. Enhance operational effectiveness by providing advice on how the use of existing and new technologies for knowledge sharing can streamline UNDP's operations.

Service Line 02. Functional/Technical Design and Implementation Support

Managing the ongoing process of design of Teamworks during the transition from prototype to full production application. Assessing and interpreting the business requirements of the Knowledge Management Group as they develop based on lessons learned through testing and use of the prototype system, and translating these into detailed technical requirements. Maintaining database of requirements through numerous iterations during development of the system. Engaging business and technology stakeholders in a matrixed organization to ensure Teamworks meets all corporate standards and corporate IT direction. Leading the design of logical and physical architectures, creating technical specifications to document all designs. Creating design specifications for integrations with corporate systems. Applying expertise in Web 2.0, social networking, and software

development to recommend design and feature enhancements. Coordinating resolution of business and technical issues with a view to ensuring successful completion of each phase of development. This includes managing technical communications with developers, in close consultation with the KM Group. Development of capacity within the KM Group to manage ongoing software development within Teamworks.

Service Line 03. Learning, Training and Advocacy

Design of learning strategy to support Teamworks users at headquarters, regional and country office levels. Development of variety of learning materials according to learning strategy, which may include self-service (computer based) training, videos, online help/FAQs. Training of trainers, both administrator and end user; Development and delivery of onsite seminars (likely to include travel overseas).

In each of these areas, consultants will be expected to deliver outputs including technical advice, analytical insights, strategic frameworks, technical reports, certain categories of training materials, and concrete recommendations for action.

Without committing any business scope and/or volume, UNDP anticipates that the consulting services will be made available primarily for Headquarters units, though visits may also be necessary to Regional Service Centres and country offices on a demand-driven basis.

This document describes:

- The procedure for submitting RFP proposals;
- The timetable and process for evaluating responses and subsequent steps leading to the selection of Consultancy Firm(s) and award of Long Term Agreement;
- UNDP's operations relevant to this RFP, and services required.

Although provisions are made for potential vendors to request additional information, it is strongly recommended that this document (including all annexes) be read thoroughly before any contact is made with UNDP. Failure to comply with the procedures laid out in this document may result in disqualification from the evaluation process.

2. Cost of proposal

The Offeror shall bear all costs associated with the preparation and submission of the Proposal, the UNDP will in no case be responsible or liable for those costs, regardless of the conduct or outcome of the solicitation.

B. Solicitation Documents

3. Contents of solicitation documents

Proposals must offer services for the **total requirement** of at least one of the Service Lines. Companies should clearly specify the Service Line(s) they will support and indicate any specific capabilities, services, or financial offers for each Service Line, for instance different CVs or consulting rates for Service Lines if applicable. If CVs or consulting rates are valid for several Service Lines, companies should spell this out. The Vendor is expected to examine all corresponding instructions, forms, terms and specifications contained in the Solicitation Documents. Failure to comply with these documents will be at the Vendor's risk and may affect the evaluation of the Proposal.

4. Clarification of solicitation documents

A prospective Offeror requiring any clarification of the Solicitation Documents may notify the procuring UNDP entity in writing by email. The procuring UNDP entity will respond in writing to any request for clarification of the Solicitation Documents that it receives one week prior to the deadline for the submission of Proposals. Written copies of the organisation's response (including an explanation of the query but without identifying the source of inquiry) will be sent to all prospective Offerors that have received the Solicitation Documents.

5. Amendments of solicitation documents

At any time prior to the deadline for submission of Proposals, the procuring UNDP entity may, for any reason, whether at its own initiative or in response to a clarification requested by a prospective Offeror, modify the Solicitation Documents by amendment.

All prospective Offerors that have received the Solicitation Documents will be notified in writing of all amendments to the Solicitation Documents.

In order to afford prospective Offerors reasonable time in which to take the amendments into account in preparing their offers, the procuring UNDP entity may, at its discretion, extend the deadline for the submission of Proposals.

C. Preparation of Proposals

6. Language of the proposal

The Proposals prepared by the Offeror and all correspondence and documents relating to the Proposal exchanged by the Offeror and the procuring UNDP entity shall be written in the English language. Any printed literature furnished by the Offeror may be written in another language so long as accompanied by an English translation of its pertinent passages in which case, for purposes of interpretation of the Proposal, the English translation shall govern.

7. Documents comprising the proposal

The Proposal shall comprise the following components:

- (i) Proposal submission form (Annex III);
- (ii) Managerial and technical part of the Proposal clearly identifying the Service Line/lines for which the submission is made, and including documentation to demonstrate that the Vendor meets all requirements for the Service Line/lines, completed in accordance with clause 8; Offerors should note that a single submission is acceptable to cover more than one Service Line, but it should be indicated very clearly which Service Lines are included in the submission.
- (iii) Financial proposal/Rate Card, completed in accordance with clause 9.

8. Managerial/Technical Proposal form

The Offeror shall structure the managerial and technical part of its Proposal as follows:

(a) Management plan

This section should provide corporate orientation to include the year and state/country of incorporation and a brief description of the Offeror's present activities. It should focus on services related to the Proposal. This section should also describe the organisational unit(s) that will become responsible for the contract, and the general management approach towards a project of this kind. The Offeror should comment on its experience in similar projects and identify the person(s) representing the Offeror in any future dealing with the procuring UNDP entity.

(b) Resource plan

This should fully explain the Offeror's resources in terms of personnel and facilities necessary for the performance of this requirement. It should describe the Offeror's current capabilities/facilities and any plans for their expansion.

(c) Proposed products and/or services

This section should demonstrate the Offeror's responsiveness to the requirement by identifying the specific components proposed, addressing the requirements, as specified, point by point; providing a detailed description of

the essential performance characteristics, proposed warranty; and demonstrating how the proposed services meet or exceed the requirements.

The technical and managerial component of your proposal should be concisely presented and structured to describe how your company's (including the proposed team members) strengths are relevant to the requirements under one or more of the three Service Lines listed under Paragraph 1 of the Instructions to Offerors. It should also elaborate on how you would work as part of the UNDP team. In particular, you are expected to elaborate your internal recruitment and training plan to ensure that you will be able to maintain the high standard of your team despite possible staff turnover. You are encouraged to include any information you might feel necessary to provide a complete picture of your proposed intervention. Please keep 'boilerplate' and marketing material to a minimum and – if necessary – include in numbered appendices.

The information you provide should include, but not necessarily be limited to, the following:

Qualification and Experience (including detailed Staff resumes)

UNDP recognizes that, whilst the reputation and organizational capabilities of particular Offerors should be taken into account, the specific experience, capabilities and characteristics of the core staff are the most important critical success factors. This is to ensure "good working relationships" and "timely delivery of the highest quality goods and services." While recognizing that being a long-term arrangement, it is not feasible to guarantee that all highly qualified consultants will be made available to UNDP at all times, however, you need to demonstrate that UNDP's request for consultancy services through such an arrangement will be treated with highest priority.

An outline of the recent experience with programmes and projects of a similar nature, including references and any information that will facilitate our evaluation of your firm's substantive reliability and financial and managerial capacity to provide the services, should also be provided.

Offerors should particularly address the following:

- Identify what you believe are the primary characteristics that differentiate your firm from others in the same Service Line(s) of the consultancy market and explain why you believe you are uniquely positioned to work with UNDP to successfully achieve the goals of the Service Lines you are bidding for.
- Describe your experience in working with public organizations, International Financial Institutions, and non-profit international entities operating in a multicultural context. Describe what role your organisation has played in partnering in international development projects.
- Illustrate significant examples of consultancy services relevant to one or more areas listed in this RFP, from analysis through design but with a clear emphasis on implementation, in which your firm has successfully participated and has delivered value. Describe, in specific terms, what that value has been and to whom it has accrued.
- For the above points, identify appropriate reference clients and details of work undertaken along with a key executive's name and contact details.

The managerial and technical part of the Proposal should not contain any pricing information whatsoever on the services offered. Pricing information shall be separated and only contained in the Financial Proposal.

It is mandatory that the Offeror's Proposal numbering system corresponds with the numbering system used in the body of this RFP. All references to descriptive material and brochures should be included in the appropriate response paragraph, though material/documents themselves may be provided as annexes to the Proposal/response.

Information which the Offeror considers proprietary, if any, should be clearly marked "proprietary" next to the relevant part of the text and it will then be treated as such accordingly.

9. Financial Proposal (this should be in a separate sealed envelope from the technical/managerial proposal)

The Offeror shall indicate on an appropriate Rate Card, an example of which is contained in these Solicitation Documents, the prices of services it proposes to supply under the contract.

10. Proposal currencies

All prices shall be quoted in US dollars.

11. Period of validity of proposals

Proposals shall remain valid for one hundred twenty (120) days after the date of Proposal submission prescribed by the procuring UNDP entity, pursuant to the deadline clause. A Proposal valid for a shorter period may be rejected by the procuring UNDP entity on the grounds that it is non-responsive.

In exceptional circumstances, the procuring UNDP entity may solicit the Offeror's consent to an extension of the period of validity. The request and the responses thereto shall be made in writing. An Offeror granting the request will not be required nor permitted to modify its Proposal.

12. Format and signing of proposals

The Offeror shall prepare two copies of the Proposal, clearly marking each "**Original Proposal – Service Line [01] – [Offeror company name]**" and "**Copy of Proposal – Service Line [01] - [Offeror company name]**" as appropriate. In the event of any discrepancy between them, the original shall govern. A single submission is acceptable to cover more than one Service Line, but it should be indicated very clearly which Service Lines are included in the submission.

The two copies of the Proposal shall be typed or written in indelible ink and shall be signed by the Offeror or a person or persons duly authorised to bind the Offeror to the contract. The latter authorisation shall be indicated by written power-of-attorney accompanying the Proposal.

A Proposal shall contain no interlineations, erasures, or overwriting except, as necessary to correct errors made by the Offeror, in which case such corrections shall be initialled by the person or persons signing the Proposal.

13. Payment

UNDP shall effect payments to the Contractor after acceptance by UNDP of the invoices submitted by the contractor, upon achievement of the corresponding milestones.

D. Submission of Proposals

14. Sealing and marking of proposals

The Offeror shall seal the Proposal in one outer and two inner envelopes, as detailed below.

(a) The outer envelope shall be:

- addressed to –

Attention: Ms Annelise Parr
KM Project Officer
Bureau for Development Policy
United Nations Development Programme
304 East 45th St, FF-10
New York, NY 10017
annelise.parr@undp.org
<http://www.undp.org/>

and,

- marked with –

“RFP for the provision of Consultancy Services in Knowledge Strategy and IT Technical Advisory Services through a Long Term Agreement (LTA) – Service Line [01/...]”

(b) Both inner envelopes shall indicate the name and address of the Offeror. The first inner envelope shall contain the information specified in Clause 8 (*Proposal form*) above, with the copies duly marked “Original – [Offeror Name]” and “Copy – [Offeror Name]” together with a CD containing an electronic copy in .pdf format of the Technical Proposal marked “Technical Proposal – NAME OF OFFEROR” The second inner envelope shall include the price schedule duly identified as such, again with a CD containing an electronic copy in .pdf format of the pricing information marked “Financial Proposal – NAME OF OFFEROR” .

Please note that if the inner envelopes are not sealed and marked as per the instructions in this clause, the procuring UNDP entity will not assume responsibility for the Proposal’s misplacement or premature opening which may render the proposal invalid.

15. Deadline for submission of proposals

Proposals must be received by the procuring UNDP entity at the address specified under clause *Sealing and marking of Proposals* no later than **Friday, 30 October 2009 at 5:00 PM New York time**.

The procuring UNDP entity may, at its own discretion extend this deadline for the submission of Proposals by amending the solicitation documents in accordance with clause *Amendments of Solicitation Documents*, in which case all rights and obligations of the procuring UNDP entity and Offerors previously subject to the deadline will thereafter be subject to the deadline as extended.

16. Late Proposals

Any Proposal received by the procuring UNDP entity after the deadline for submission of proposals, pursuant to clause *Deadline for the submission of proposals*, will be rejected.

17. Modification and withdrawal of Proposals

The Offeror may withdraw its Proposal after the Proposal’s submission, provided that written notice of the withdrawal is received by the procuring UNDP entity prior to the deadline prescribed for submission of Proposals.

The Offeror’s withdrawal notice shall be prepared, sealed, marked, and dispatched in accordance with the provisions of clause *Deadline for Submission of Proposals*. The withdrawal notice may also be sent by telex or fax but followed by a signed confirmation copy.

No Proposal may be modified subsequent to the deadline for submission of proposals.

No Proposal may be withdrawn in the Interval between the deadline for submission of proposals and the expiration of the period of proposal validity specified by the Offeror on the Proposal Submission Form.

E. Opening and Evaluation of Proposals

18. Opening of proposals

The procuring entity will open the Proposals in the presence of a Committee formed by the Head of the procuring UNDP entity.

19. Clarification of proposals

To assist in the examination, evaluation and comparison of Proposals, the Purchaser may at its discretion, ask the Offeror for clarification of its Proposal. The request for clarification and the response shall be in writing and no change in price or substance of the Proposal shall be sought, offered or permitted.

20. Preliminary examination

The Purchaser will examine the Proposals to determine whether they are complete, whether any computational errors have been made, whether the documents have been properly signed, and whether the Proposals are generally in order.

Prior to the detailed evaluation, the Purchaser will determine the substantial responsiveness of each Proposal to the Request for Proposals (RFP). For purposes of these Clauses, a substantially responsive Proposal is one which conforms to all the terms and conditions of the RFP without material deviations. The Purchaser's determination of a Proposal's responsiveness is based on the contents of the Proposal itself without recourse to extrinsic evidence.

A Proposal determined as not substantially responsive will be rejected by the Purchaser and may not subsequently be made responsive by the Offeror by correction of the non-conformity.

At time of opening of financial proposals, arithmetical errors will be rectified on the following basis: If there is a discrepancy between the unit price and the total price that is obtained by multiplying the unit price and quantity, the unit price shall prevail and the total price shall be corrected. If the Offeror does not accept the correction of errors, its Proposal will be rejected. If there is a discrepancy between words and figures the amount in words will prevail.

21. Evaluation and comparison of proposals

A two stage procedure is utilised in evaluating the proposals, with evaluation and scoring of the technical proposal being concluded prior opening any price proposal. The pricing component of the Proposals will be opened only for those submissions that have attained the minimum technical score of 700 points out of a maximum obtainable score of 1000 points during the evaluation of the technical proposals.

First Stage (Technical)

The technical proposal is evaluated by an Evaluation Committee on the basis of its responsiveness to the Terms of Reference (TOR), and scoring is allocated in accordance with the Technical Evaluation Criteria below. The Evaluation Committee may request brief presentations from Offerors as part of its evaluation of submissions, and in this event Offerors will be given at least 3 days notice to prepare their presentations. Once all the presentations are completed, the Evaluation Committee reviews its initial scoring and gives a final score for the technical evaluation stage.

Second Stage (Financial)

For the Financial Evaluation, the price proposal of all Offerors that have attained a minimum 700 points of the 1000 points maximum obtainable score in the technical evaluation will be compared. A maximum attainable score of 300 points will be assigned in the evaluation of the financial proposals.

UNDP will award a contract to the Offeror offering the best cumulative score giving 70% weight to technical scores and 30% weight to financial scores.

The financial evaluation will assign a score of 1000 to the company offering the lowest price of those proposals that attained at least the 70% of the technical score required. The rest of the offers will receive lower scores proportional with the price differences according to the following formula:

LPO:	Lowest price offered
EOi:	Economic offer of the Offeror "i"
Score:	Score obtained by the Offeror "i", in the financial evaluation.

$$Score_i : \left(1 - \left(\frac{EO_i - LPO}{EO_i} \right) \right) \cdot 1000$$

In the Second Stage, the technical and financial scores will be considered combined in the following percentages and the contract will be awarded to the Vendor attaining the highest combined score:

Technical Evaluation (in percentage points)	70%
Financial Evaluation (in percentage points)	30%
Total	100%

Technical Evaluation Criteria

Summary of Technical Proposal Evaluation Forms		Score Weight	Points Obtainable	Company / Other Entity				
				A	B	C	D	E
1.	Expertise of Firm / Organisation submitting Proposal	30%	300					
2.	Breadth and depth of scope of services provided per TOR.	40%	400					
3.	Key and Representative Personnel	30%	300					
Total			1000					

Evaluation forms for technical proposals follow on the next two pages. The obtainable number of points specified for each evaluation criterion indicates the relative significance or weight of the item in the overall evaluation process. The Technical Proposal Evaluation Forms are:

Form 1: Expertise of Firm / Organisation Submitting Proposal

Form 2: Proposed Work Plan and Approach

Form 3: Personnel

Technical Proposal Evaluation Form 1		Sub-scores (where applicable)	Total Points obtainable	Company / Other Entity				
				A	B	C	D	E
Expertise of firm / organisation submitting proposal								
1.1	Company structure and organisational capability		200					
a)	Reputation of Organisation and Staff (Competence / Reliability)	35						
b)	Litigation and arbitration history	25						
c)	General organisational capability which is likely to affect implementation (i.e. loose consortium, holding company or single firm, size of firm / organisation, strength of project management support, e.g. project financing capacity and project management controls)	15						
d)	Quality assurance process	35						
e)	Quality of delivery of past projects (provide examples / references of past work)	40						

f)	Relevance (to Service Line) of: - Specialised knowledge - Experience on similar programme / projects - Work for UNDP / major multilateral or bilateral programmes	50						
Total Form 1			200					

Technical Proposal Evaluation Form 2		Sub-score	Total Points Obtainable	Company / Other Entity				
				A	B	C	D	E
Proposed Work Plan and Approach								
2.1	Breadth and depth of scope of services provided per TOR		400					
a)	Variety of topics covered (demonstrating flexibility)	70						
b)	International / global flavor consideration	50						
c)	Relevance / similarity of previous projects	80						
d)	Demonstration of clear strategic business thinking	100						
e)	Clarity of proposal (demonstrating strong communication skills)	100						
	Total Form 2		400					

Technical Proposal Evaluation Form 3		Sub-scores	Total Points Obtainable	Company / Other Entity				
				A	B	C	D	E
Key and Representative Personnel								
3.1	Has the Offeror provided detailed resumes for all representative personnel?	20	80					
	Does each member of the proposed team appear strong and capable of meeting all requirements of a particular Service Line? In terms of <ul style="list-style-type: none">- Specialized Knowledge- Experience on Similar Programme / Projects	60						
3.2	Relationship / Project Manager		130					
	Professional Experience in Project Management (for example PRINCE 2, or similar)	30						
	General qualification in the Service Line	30						
	Suitability for the work <ul style="list-style-type: none">- Complex organizational experience- Professional experience in the area of specialization	70						
3.3	Senior Experts		110					

	General qualification	40						
	Suitability for the work - Complex organizational experience - Professional experience in the area of specialization	70						
3.3	Junior Experts		80					
	General qualification	20						
	Suitability for the work - Professional experience in the area of specialization	60						
	Total Form 3		400					
	Total Forms 1, 2 and 3		1000					

F. Award of Contract

Tentative Timetable - Summary

The following tentative table represents UNDP's desired timetable for the selection of a firm/firms to assist in this project.

RFP Process	Deadlines
Publish RFP on UNDP Website	15 October 2009
Email intention to respond	19 October 2009
Deadline for email questions/clarifications on the RFP	23 October 2009
Post response to bidders queries on the RFP	28 October 2009
Deadline for receiving Offerors proposals	30 October 2009
Evaluation of technical proposals, References	6 November 2009
Financial proposals	13 November 2009
Internal processes on procurement	13-30 November 2009
Selected companies informed	4 December 2009

22. Award criteria, award of contract

The procuring UNDP entity reserves the right to accept or reject any Proposal, and to annul the solicitation process and reject all Proposals at any time prior to award of contract, without thereby incurring any liability to the affected Offeror or any obligation to inform the affected Offeror or Offerors of the grounds for the Purchaser's action

Prior to expiration of the period of proposal validity, the procuring UNDP entity will award the contract to the qualified Offeror whose Proposal after being evaluated received the highest combined technical and financial score.

The attention of Offerors is drawn to the fact that the proposal submitted by the successful Offeror may be incorporated in its entirety in the LTA with UNDP as part of the statement of work.

23. Purchaser's right to vary requirements at time of award

The Purchaser reserves the right at the time of award of contract to vary the quantity of services specified in the RFP without any change in price or other terms and conditions.

24. Signing of the contract

Within 30 days of receipt of the contract the successful Offeror shall sign and date the contract and return it to the Purchaser.

Failure of the successful Offeror to comply with the requirement of Clause 24 shall constitute sufficient grounds for the annulment of the award if any, in which event the Purchaser may make the award to the next lowest evaluated Offeror or call for new Proposals if applicable.

25. Long Term Agreement (LTA)

A long-term agreement is a mutual arrangement between UNDP and a contractor to provide the required services at prescribed prices or pricing provisions over a period of 24 months, with possibility of extension for an additional 12 months. UNDP reserves the right to rescind the agreement during that period due to unsatisfactory performance of the consultant. Under an LTA, UNDP does not warrant that any quantity of services will be purchased during the term of this Agreement. Where a request for services arises, UNDP will directly contract the consultant under LTA based on its need to carry out those activities. A specific Term of Reference outlining the outputs for each assignment will be provided. For each request/assignment cost above \$2,500, an Institutional Service Contract would also be issued to the contractor.

A model LTA, and General Conditions are attached herewith for reference as Annexes V, and VI respectively.

Terms of Reference (TOR)

Consultancy Services in Knowledge Strategy and IT Technical Advisory Services through a Long Term Arrangement with UNDP

Background

UNDP is the UN's global development network, an organization advocating for change and connecting countries to knowledge, experience and resources to help people build a better life. UNDP is on the ground in 166 countries, working with countries to find their own solutions to global and national development challenges. As they develop local capacity, they draw on the people of UNDP and its wide range of partners. World leaders have pledged to achieve the Millennium Development Goals, including the overarching goal of cutting poverty in half by 2015. UNDP's network links and coordinates global and national efforts to reach these goals.

In support of these goals, UNDP's Knowledge Strategy 2009-2011 combines the best of knowledge management achievements of the last decade, such as Communities of Practice, with new mechanisms for social networking, self-generated discussions, connections and collaboration. The technology behind this effort is a web-based, globally-integrated platform that enables UNDP and external partners to leverage the collective knowledge of communities, individuals, programmes and projects in the most useful, cost-effective manner. Currently in prototype, the system is known as Teamworks.

Teamworks uses social networking, collaborative spaces and instant communication tools to connect people with their knowledge and experience. An easy-to-navigate knowledge base for individuals, groups, programmes and projects, Teamworks fosters efficiency and collaboration by making instantly accessible not only knowledge, but the individuals and contexts behind that knowledge. Teamworks makes the knowledge of staff in the field, at the regional level and at headquarters accessible to the rest of the organization; it makes local experience globally available and global experience locally available.

Through this RFP, UNDP's Bureau for Development Policy, Knowledge Management Group seeks to develop a roster of consulting companies from which to draw resources whenever there is a need to augment existing internal resources. The consulting companies will be expected to deliver outputs including analytical insights, strategic frameworks, designs, plans, training materials, concrete recommendations for action, surveys, technical reports.

Services to be Provided

Specific requirements for consultancy services to support functional services are listed in the areas noted below. Depending on the nature of the services of each particular assignment, consultants may work from home offices but may also be required to work at UNDP headquarters in New York or if necessary travel overseas.

Note that selected firms must demonstrate **full** competency in at least one of these Service Lines.

Service Line 01. Change Management and Business Process Re-engineering

- a) Develop and implement change management strategy, to include conduct of organizational needs assessment;
- b) Develop a communication strategy and plan;
- c) Develop phased roll-out plan for introducing the finalized UNDP Teamworks application within UNDP;
- d) Recommending incentive structure to encourage use of Teamworks;
- e) Identifying resistance points across different user groups in the organisation and recommending solutions to overcome the resistance;
- f) Advise on the use of new technologies as a means of enhancing productivity and efficiency in the delivery of knowledge services to UNDP's clients;
- g) Develop robust governance structures for the Knowledge Strategy, both internal and multi-agency;

- h) Apply knowledge of Web 2.0 to advise on user experience and system effectiveness.

Service Line 02. Functional / Technical Design and Implementation Support

- a) Work closely with BDP KM Group to design features that meet BDP KM Group requirements and that leverage current Teamworks prototype solution capabilities;
- b) Work with BDP KM Group to develop high level business requirements and translate into clear functional specifications, including preparing use cases, screen mock-ups, and formal requirements, in a risk-based manner, in support of rapid project delivery;
- c) Architecture Design – develop formal specifications that describe IT architecture;
- d) Detailed technical design (Standards, Governance, Oversight, Signoffs);
- e) Integration design (Coordination with IT offices of UNDP and external UN stakeholders);
- f) Business process design of user and technical support model;
- g) Business process design of administration model;
- h) Lead the design of logical and physical architectures, creating technical specifications to document all designs of logical and physical architectures;
- i) Create design specifications for integrations with corporate systems;
- j) Apply expertise in Web 2.0, social networking, and software development to recommend design and feature enhancements;
- k) Management of requirements scope for multiple releases of Teamworks, ensuring clear communication and understanding between development vendor(s) and BDP KM Group;
- l) Implementation governance, including representation of functional specifications to IT development vendors;
- m) Maintaining a database of issues and user feedback, and coordination of development vendor resolution;
- n) Coordinating delivery of Teamworks, liaising between UNDP KM Group and development vendor(s);
- o) Engage business and technology stakeholders in a matrixed organization to ensure Teamworks meets all corporate standards and corporate IT direction;
- p) Oversee User Acceptance Testing, including creating a comprehensive test plan and producing high-level requirements-based test cases for user acceptance testing purposes;
- q) Technical advocacy – coordinate and support focal point network with UNDP business units and UN agency partners;
- r) Generating detailed, on-demand system reports and statistics on Teamworks usage; and
- s) Coordinating the Teamworks release management process in discrete environments.

Service Line 03. Learning, Training and Advocacy

- a) Develop learning and training strategy, curriculum and materials for UNDP staff and external users of Teamworks;
- b) Provide support for conferences, seminars, workshops, and training activities as required;
- c) Promote the development of knowledge products at headquarters, regional and country level; and,
- d) Training of helpdesk capacity to support Teamworks users both within UNDP and for UN partners.

Minimum Requirements

To be selected, companies must satisfy the following set of minimum requirements:

- i. Proven competency in all aspects of at least one of the three Service Lines
- ii. Experience in working with or providing solutions for public sector organisations
- iii. Minimum size of firm is five full-time staff consultants
- iv. Strong background in project management methodologies and processes, progress reporting, risk management, project management tools, project planning and control techniques
- v. Quality of consultants to be supported by suitable educational backgrounds in Information Technology, Business, Public Administration, or other relevant fields from a recognized institution of higher learning (or at least Bachelor's degree with equivalent experience for the case of highly technical skills sets)

Additional Desired Requirements (vary according to each Service Line)

In addition, the following are desired characteristics of selected companies and will be treated as an advantage in applicable Service Lines:

- i. Familiarity with UN organizations and business processes a strong advantage;
- ii. Prior working experience in field-based international development projects within the UN system and/or international institutions;
- iii. Thorough knowledge of system analysis models, applications, and best practices;
- iv. Strong background in varying software delivery lifecycle models and experience in establishing development maturity;
- v. Experience in managing the implementation, configuring and bringing into service of complex business systems within IT / Software lifecycles environment.

Only qualified firms that have met the minimum requirements should apply.

Dear Sir / Madam,

We undertake, if our Proposal is accepted, to commence and complete delivery of all services specified in the contract within the time frame stipulated.

We understand that you are not bound to accept any Proposal you may receive.

Signature

Duly authorised to sign Proposal for and on behalf of

FINANCIAL PROPOSAL / RATE CARD

The Contractor is asked to prepare the Financial Proposal / Rate Card as a separate envelope from the rest of the RFP response as indicated in Section D paragraph 14 (b) of the Instruction to Offerors.

All prices/rates quoted must be exclusive of all taxes, since the UNDP is exempt from taxes as detailed in Section V, Clause 18. '

The Financial Proposal must provide a detailed cost breakdown. Provide separate figures for each Service Line.

Estimates for cost-reimbursable items, if any, such as travel, and out of pocket expenses should be listed separately.

The format shown below should be used in preparing the Financial Proposal. The format includes specific expenditures, which may or may not be required or applicable but are indicated to serve as examples.

In addition to the hard copy, if please also provide the information in .pdf format on CD-ROM.

Rate Card template

Offerors should provide details of their rates in one or more of the Service Lines. As indicated throughout this RFP it is NOT NECESSARY for Offerors to offer service in more than one Service Line but it is important to indicate clearly which Service Line is being applied for.

Description		Service Line 1	Service Line 2	Service Line 3
Consultant Rate per day in US\$	Relationship Manager			
	Senior +5 yrs			
	Junior 3-5 yrs			
Other out- of-pocket expenses (please list)				

**LONG TERM AGREEMENT FOR THE PROVISION OF SERVICES
TO THE UNITED NATIONS DEVELOPMENT PROGRAMME**

This Long Term Agreement is made between the United Nations Development Programme, a subsidiary organ of the United Nations, having its headquarters at 1 UN Plaza, New York, NY 10017 (hereinafter “UNDP”) and _____ (hereinafter called “Contractor”) with its headquarters at _____.

WHEREAS, UNDP desires to enter into a Long Term Agreement for the provision of services by the Contractor to UNDP, pursuant to which UNDP country offices world-wide can conclude specific contractual arrangements with the Contractor, as provided herein;

WHEREAS pursuant to the Request for Proposal[to complete] the offer of the Contractor was accepted;

NOW, THEREFORE, UNDP and the Contractor (hereinafter jointly the “Parties”) hereby agree as follows:

Article 1: SCOPE OF WORK

1. The Contractor shall provide the types of services and deliverables, which are listed in Annex 1 hereto (“Services/Terms of Reference”), as and when negotiated by UNDP headquarters or a UNDP country office and reflected in a contract for professional services, in the form attached hereto as Annex 2.
2. Such Services shall be at the discount prices listed in Annex 3. The prices shall remain in effect for a period of two years from Entry into Force of this Agreement.
3. UNDP does not warrant that any quantity of Services will be purchased during the term of this Agreement, which shall be for two years.

Article 2: CHANGES IN CONDITION

4. In the event of any advantageous technical changes and/or downward pricing of the Services during the duration of this Agreement, the Contractor shall notify UNDP immediately. UNDP shall consider the impact of any such event and may request an amendment to the Agreement.

Article 3: CONTRACTOR'S REPORTING

5. The Contractor will report semi-annually to UNDP on the Services provided to UNDP, including its country offices.

Article 4: GENERAL AND SPECIAL TERMS AND CONDITIONS

6. The standard UNDP General Conditions for Professional Services, attached as Annex 4, shall apply to this Agreement, and any subsequent contracts concluded in accordance with paragraph 1 above.

Article 5: ACCEPTANCE

7. This Agreement supersedes all prior oral or written agreements, if any, between the Parties and constitutes the entire agreement between the parties with respect to the provision of the Services hereunder.
8. This Agreement shall enter into force on the date of the last signature by the representatives of the Parties and shall remain in force for a period of two years, and may be extended for [one additional] year by mutual agreement of the Parties.

IN WITNESS WHEREOF, the duly authorized representative of the PARTIES have signed this agreement.

For and on behalf of:

UNITED NATIONS
DEVELOPMENT PROGRAMME

Date:_____

Date:_____

Description of annexes typically included with LTA:

Annex 1: Terms of Reference

Prepared by UNDP. As detailed as possible. The terms of reference specify in detail the scope of work linking activities to deliverable in a specific time frame.

Annex 2: Contract for Professional Services

The detailed contractual agreement that specifies rights and obligations of the contracting parties.

Annex 3: Discount prices. To be provided by contracted company.

Annex 4: UNDP General Conditions

Applicable to all contracts.

General Conditions of Contract**1. LEGAL STATUS**

The Contractor shall be considered as having the legal status of an independent contractor vis-à-vis UNDP. The Contractor's personnel and sub-contractors shall not be considered in any respect as being the employees or agents of UNDP or the United Nations.

2. SOURCE OF INSTRUCTIONS

The Contractor shall neither seek nor accept instructions from any authority external to UNDP in connection with the performance of its services under this Contract. The Contractor shall refrain from any action which may adversely affect UNDP or the United Nations and shall fulfil its commitments with the fullest regard to the interests of UNDP.

3. CONTRACTOR'S RESPONSIBILITY FOR EMPLOYEES

The Contractor shall be responsible for the professional and technical competence of its employees and will select, for work under this Contract, reliable individuals who will perform effectively in the implementation of this Contract, respect the local customs, and conform to a high standard of moral and ethical conduct.

4. ASSIGNMENT

The Contractor shall not assign, transfer, pledge or make other disposition of this Contract or any part thereof, or any of the Contractor's rights, claims or obligations under this Contract except with the prior written consent of UNDP.

5. SUB-CONTRACTING

In the event the Contractor requires the services of sub-contractors, the Contractor shall obtain the prior written approval and clearance of UNDP for all sub-contractors. The approval of UNDP of a sub-contractor shall not relieve the Contractor of any of its obligations under this Contract. The terms of any sub-contract shall be subject to and conform with the provisions of this Contract.

6. OFFICIALS NOT TO BENEFIT

The Contractor warrants that no official of UNDP or the United Nations has received or will be offered by the Contractor any direct or indirect benefit arising from this Contract or the award thereof. The Contractor agrees that breach of this provision is a breach of an essential term of this Contract.

7. INDEMNIFICATION

The Contractor shall indemnify, hold and save harmless, and defend, at its own expense, UNDP, its officials, agents, servants and employees from and against all suits, claims, demands, and liability of any nature or kind, including their costs and expenses, arising out of acts or omissions of the Contractor, or the Contractor's employees, officers, agents or sub-contractors, in the performance of this Contract. This provision shall extend, inter alia, to claims and liability in the nature of workmen's compensation, products liability and liability arising out of the use of patented inventions or devices, copyrighted material or other intellectual property by the Contractor, its employees, officers, agents, servants or sub-contractors. The obligations under this Article do not lapse upon termination of this Contract.

8. INSURANCE AND LIABILITIES TO THIRD PARTIES

8.1 The Contractor shall provide and thereafter maintain insurance against all risks in respect of its property and any equipment used for the execution of this Contract.

8.2 The Contractor shall provide and thereafter maintain all appropriate workmen's compensation insurance, or its equivalent, with respect to its employees to cover claims for personal injury or death in connection with this Contract.

8.3 The Contractor shall also provide and thereafter maintain liability insurance in an adequate amount to cover third party claims for death or bodily injury, or loss of or damage to property, arising from or in connection with the provision of services under this Contract or the operation of any vehicles, boats, airplanes or other equipment owned or leased by the Contractor or its agents, servants, employees or sub-contractors performing work or services in connection with this Contract.

8.4 Except for the workmen's compensation insurance, the insurance policies under this Article shall:

- (i) Name UNDP as additional insured;
- (ii) Include a waiver of subrogation of the Contractor's rights to the insurance carrier against UNDP;
- (iii) Provide that UNDP shall receive thirty (30) days written notice from the insurers prior to any cancellation or change of coverage.

8.5 The Contractor shall, upon request, provide UNDP with satisfactory evidence of the insurance required under this Article.

D. 9. ENCUMBRANCES/LIENS

The Contractor shall not cause or permit any lien, attachment or other encumbrance by any person to be placed on file or to remain on file in any public office or on file with UNDP against any monies due or to become due for any work done or materials furnished under this Contract, or by reason of any other claim or demand against the Contractor.

10. TITLE TO EQUIPMENT

Title to any equipment and supplies that may be furnished by UNDP shall rest with UNDP and any such equipment shall be returned to UNDP at the conclusion of this Contract or when no longer needed by the Contractor. Such equipment, when returned to UNDP, shall be in the same condition as when delivered to the Contractor, subject to normal wear and tear. The Contractor shall be liable to compensate UNDP for equipment determined to be damaged or degraded beyond normal wear and tear.

11. COPYRIGHT, PATENTS AND OTHER PROPRIETARY RIGHTS

UNDP shall be entitled to all intellectual property and other proprietary rights including but not limited to patents, copyrights, and trademarks, with regard to products, or documents and other materials which bear a direct relation to or are produced or prepared or collected in consequence of or in the course of the execution of this Contract. At the UNDP's request, the Contractor shall take all necessary steps, execute all necessary documents and generally assist in securing such proprietary rights and transferring them to UNDP in compliance with the requirements of the applicable law.

12. USE OF NAME, EMBLEM OR OFFICIAL SEAL OF UNDP OR THE UNITED NATIONS

The Contractor shall not advertise or otherwise make public the fact that it is a Contractor with UNDP, nor shall the Contractor, in any manner whatsoever use the name, emblem or official seal of UNDP or the United Nations, or any abbreviation of the name of UNDP or the United Nations in connection with its business or otherwise.

13. CONFIDENTIAL NATURE OF DOCUMENTS AND INFORMATION

13.1 All maps, drawings, photographs, mosaics, plans, reports, recommendations, estimates, documents and all other data compiled by or received by the Contractor under this Contract shall be the property of UNDP, shall be treated as confidential and shall be delivered only to UNDP authorized officials on completion of work under this Contract.

13.2 The Contractor may not communicate at any time to any other person, Government or authority external to UNDP, any information known to it by reason of its association with UNDP which has not been made public except with the authorization of UNDP; nor shall the Contractor at any time use such information to private advantage. These obligations do not lapse upon termination of this Contract.

14. FORCE MAJEURE; OTHER CHANGES IN CONDITIONS

14.1 Force majeure, as used in this Article, means acts of God, war (whether declared or not), invasion, revolution, insurrection, or other acts of a similar nature or force which are beyond the control of the Parties.

14.2 In the event of and as soon as possible after the occurrence of any cause constituting force majeure, the Contractor shall give notice and full particulars in writing to UNDP, of such occurrence or change if the Contractor is thereby rendered unable, wholly or in part, to perform its obligations and meet its responsibilities under this Contract. The Contractor shall also notify UNDP of any other changes in conditions or the occurrence of any event which interferes or threatens to interfere with its performance of this Contract. The notice shall include steps proposed by the Contractor to be taken including any reasonable alternative means for performance that is not prevented by force majeure. On receipt of the notice required under this Article, UNDP shall take such action as, in its sole discretion, it considers to be appropriate or necessary in the circumstances, including the granting to the Contractor of a reasonable extension of time in which to perform its obligations under this Contract.

14.3 If the Contractor is rendered permanently unable, wholly, or in part, by reason of force majeure to perform its obligations and meet its responsibilities under this Contract, UNDP shall have the right to suspend or terminate this Contract on the same terms and conditions as are provided for in Article 15, "Termination", except that the period of notice shall be seven (7) days instead of thirty (30) days.

15. TERMINATION

15.1 Either party may terminate this Contract for cause, in whole or in part, upon thirty days notice, in writing, to the other party. The initiation of arbitral proceedings in accordance with Article 16 "Settlement of Disputes" below shall not be deemed a termination of this Contract.

15.2 UNDP reserves the right to terminate without cause this Contract at any time upon 15 days prior written notice to the Contractor, in which case UNDP shall reimburse the Contractor for all reasonable costs incurred by the Contractor prior to receipt of the notice of termination.

15.3 In the event of any termination by UNDP under this Article, no payment shall be due from UNDP to the Contractor except for work and services satisfactorily performed in conformity with the express terms of this Contract. The Contractor shall take immediate steps to terminate the work and services in a prompt and orderly manner and to minimize losses and further expenditures.

15.4 Should the Contractor be adjudged bankrupt, or be liquidated or become insolvent, or should the Contractor make an assignment for the benefit of its creditors, or should a Receiver be appointed on account of the insolvency of the Contractor, UNDP may, without prejudice to any other right or remedy it may have, terminate this Contract forthwith. The Contractor shall immediately inform UNDP of the occurrence of any of the above events.

16. SETTLEMENT OF DISPUTES

16.1. Amicable Settlement

The Parties shall use their best efforts to settle amicably any dispute, controversy or claim arising out of, or relating to this Contract or the breach, termination or invalidity thereof. Where the parties wish to seek such an amicable

settlement through conciliation, the conciliation shall take place in accordance with the UNCITRAL Conciliation Rules then obtaining, or according to such other procedure as may be agreed between the parties.

16.2. Arbitration

Unless, any such dispute, controversy or claim between the Parties arising out of or relating to this Contract or the breach, termination or invalidity thereof is settled amicably under the preceding paragraph of this Article within sixty (60) days after receipt by one Party of the other Party's request for such amicable settlement, such dispute, controversy or claim shall be referred by either Party to arbitration in accordance with the UNCITRAL Arbitration Rules then obtaining, including its provisions on applicable law. The arbitral tribunal shall have no authority to award punitive damages. The Parties shall be bound by any arbitration award rendered as a result of such arbitration as the final adjudication of any such controversy, claim or dispute.

17. PRIVILEGES AND IMMUNITIES

Nothing in or relating to this Contract shall be deemed a waiver, express or implied, of any of the privileges and immunities of the United Nations, including its subsidiary organs.

18. TAX EXEMPTION

18.1 Section 7 of the Convention on the Privileges and Immunities of the United Nations provides, inter-alia, that the United Nations, including its subsidiary organs, is exempt from all direct taxes, except charges for public utility services, and is exempt from customs duties and charges of a similar nature in respect of articles imported or exported for its official use. In the event any governmental authority refuses to recognize the United Nations exemption from such taxes, duties or charges, the Contractor shall immediately consult with UNDP to determine a mutually acceptable procedure.

18.2 Accordingly, the Contractor authorizes UNDP to deduct from the Contractor's invoice any amount representing such taxes, duties or charges, unless the Contractor has consulted with UNDP before the payment thereof and UNDP has, in each instance, specifically authorized the Contractor to pay such taxes, duties or charges under protest. In that event, the Contractor shall provide UNDP with written evidence that payment of such taxes, duties or charges has been made and appropriately authorized.

19 CHILD LABOUR

19.1 The Contractor represents and warrants that neither it, nor any of its suppliers is engaged in any practice inconsistent with the rights set forth in the Convention on the Rights of the Child, including Article 32 thereof, which, inter alia, requires that a child shall be protected from performing any work that is likely to be hazardous or to interfere with the child's education, or to be harmful to the child's health or physical mental, spiritual, moral or social development.

19.2 Any breach of this representation and warranty shall entitle UNDP to terminate this Contract immediately upon notice to the Contractor, at no cost to UNDP.

20. MINES

20.1 The Contractor represents and warrants that neither it nor any of its suppliers is actively and directly engaged in patent activities, development, assembly, production, trade or manufacture of mines or in such activities in respect of components primarily utilized in the manufacture of Mines. The term "Mines" means those devices defined in Article 2, Paragraphs 1, 4 and 5 of Protocol II annexed to the Convention on Prohibitions and Restrictions on the Use of Certain Conventional Weapons Which May Be Deemed to Be Excessively Injurious or to Have Indiscriminate Effects of 1980.

20.2 Any breach of this representation and warranty shall entitle UNDP to terminate this Contract immediately upon notice to the Contractor, without any liability for termination charges or any other liability of any kind of UNDP.

21. OBSERVANCE OF THE LAW

The Contractor shall comply with all laws, ordinances, rules, and regulations bearing upon the performance of its obligations under the terms of this Contract.

22. AUTHORITY TO MODIFY

No modification or change in this Contract, no waiver of any of its provisions or any additional contractual relationship of any kind with the Contractor shall be valid and enforceable against UNDP unless provided by an amendment to this Contract signed by the authorized official of UNDP.