

## INDIVIDUAL CONSULTANT PROCUREMENT NOTICE



Date: 9 May 2018

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**Country:** Thailand

**Description of the assignment:** Senior Advisor, Investor Relations & Business Development

**Duty Station:** Home based with possible travels

**Project name:** UNDP- BRH- SDG Impact Finance (UNSIF)

**Period of assignment/services (if applicable):** 15 June 2018– 30 November 2018 (up to 60 working days).

To apply for this position, please click the link below:

[https://jobs.undp.org/cj\\_view\\_job.cfm?cur\\_job\\_id=78770](https://jobs.undp.org/cj_view_job.cfm?cur_job_id=78770)

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### 1. BACKGROUND

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. The new Sustainable Development Goals (SDGs) will cost an annual estimated US\$5-7 trillion , with an investment gap in developing countries of about \$2.5 trillion.

Established in Jan 2017, UNDP SDG Impact Finance (UNSIF), is a unique and transparent co-investment platform to promote the public and private investment for the Sustainable Development Goals(SDGs). UNSIF aims to address the financing gaps for SDGs, by facilitating SDGs aligned Impact Investments to support national development priorities, and working with the capital market to create both economic and social returns.

UNSIF is actively working in Asia Pacific region, in the key area of poverty reduction, inclusive finance, job creation, affordable and clean energy, industry innovation & infrastructure, sustainable cities & communities, and climate change, etc.

To address this challenge, the Senior Consultant for Investor Relations and Business Development will help UNSIF and its associated funds and projects by identifying new partners and market opportunities, creating or adapting UNSIF products and services.

## **2. OBJECTIVE, SCOPE OF WORK, RESPONSIBILITIES AND DESCRIPTION OF THE PROPOSED ANALYTICAL WORK**

### **Scope of Work**

The senior consultant will be responsible for the following activities:

#### **Investor Relations**

- Build investor confidence in UNSIF's vision and its co-branded funds and other initiatives;
- Develop and implement a comprehensive Investor Relations framework and strategy to attract potential institutional investors and High-Net Worth Individuals, including Investor Mapping; develop and expand the Investor base (including IFIs, institutional investors, Family Offices etc.);
- Build and maintain a powerful reputation through clear and consistent communication, including regular conference calls, investor-targeted events, etc. Arrange and participate in one on one meetings and/or conference calls with investors, and keep detailed meeting notes to be shared with UNSIF team to ensure relationships be transferrable afterwards;
- Monitor investment research and reports key findings on major players to the Management of UNSIF; Evaluate the advice and recommendations of the internal and external stakeholders including investment advisors, financial institutions and industry experts;
- Build and maintain high-level network with prospective investors; develop the UNSIF investor database with the investor contacts and relevant background information;
- Assist with organizing roadshows for fund capitalization as needed; Initiate and respond to written, telephone and email inquiries from members of the financial community;
- Provide market feedback and insights to the UNSIF team, including financial trends, investor appetite, shareholder/investor concerns, etc.;
- Provide in depth technical support, including reviewing results analysis, preparing investor presentations/roadshows, providing inputs to external communication materials to make them more investment ready, etc.;

- Provide trainings for the team on building successful investor relations as needed.

### 3. REQUIREMENTS FOR EXPERIENCE AND QUALIFICATIONS

#### Education:

- ) Degree in finance, economics, management, or related fields; MBA is a plus.

#### Experience:

- ) 10+ years of industry experience in financial institutions or capital markets, ideally 5+ years of investor relations experience in the field of private equity and venture capital and working with large institutional investors;
- ) Sound knowledge of the current issue of the SDGs financing landscape, impact investment, and is familiar with development context and trends;
- ) Business development experience and work with institutional and individual investors including Funds of Funds, institutional investors, Asset Managers, Family Offices, HNWI, various funding sources run under Government, Venture Philanthropy, Corporate Venturing.
- ) Sound skills of research and analysis on the topic; able to provoke thoughts and ideas in the area and have innovative ideas and initiatives;
- ) Strong communication skills, including ability to interact at C-level both internally and externally, and to deliver business strategies and complex financial information clearly and accurately to a variety of audiences both orally and through written material;
- ) Broad awareness of current events, industry trends and regulatory environment;
- ) Knowledge of the Asian market and established connections with global investors interested in Asia-Pacific exposure a plus.

#### Language:

- ) Excellent English (written and spoken);

#### Competencies

- ) Openness to change and ability to receive/integrate feedback;
- ) Ability to plan, organize, implement and report on work;
- ) Outstanding communication, project management and organizational skills;
- ) Excellent presentation and facilitation skills.
- ) Demonstrates integrity and ethical standards;
- ) Positive, constructive attitude to work;
- ) Displays cultural, gender, religion, race, nationality and age sensitivity and adaptability.

### 4. DURATION OF ASSIGNMENT, DUTY STATION AND EXPECTED PLACES OF TRAVEL

**Contract Duration:** 15 June 2018 to 30 November 2018 (up to 60 working days).

**Duty Station:** Home based with possible travel.

## 5. FINAL PRODUCTS

Expected Deliverables:

- ) Investor mapping (with substantiated research on the success prospects for potential investors);
- ) LP Strategy for UNSIF and its associated funds and projects ;
- ) At least 10 meetings with targeted investors (with notes provided and contacts shared) that directly helps with fund capitalization and received positive feedback and soft commitments.

## 6. PROVISION OF MONITORING AND PROGRESS CONTROLS

The consultant will work under the overall guidance of the Head of the UNSIF, and in close communication with designated team members.

## 7. DOCUMENTS TO BE INCLUDED WHEN SUBMITTING THE PROPOSALS.

Interested individual consultants must submit the following documents/information to demonstrate their qualifications. Please group them into **one (1) single PDF document** as the application only allows to upload maximum one document:

- ) **Confirmation Letter of Interest and Availability** using the template provided in [Annex II](#).
- ) **Personal CV or P- 11**, indicating all past experience from similar projects, as well as the contact details (email and telephone number) of the Candidate and at least three (3) professional references.
- ) **Financial proposal**, indicates the all-inclusive fixed total contract price, supported by a breakdown of costs (in USD currency) as per template provided in [Annex II](#). **Note:** National consultant must quote price in U.S. Dollar. If an Offeror is employed by an organization/company/institution, and he/she expects his/her employer to charge a management fee in the process of releasing him/her to UNDP under Reimbursable Loan Agreement (RLA), the Offeror must indicate at this point, and ensure that all such costs are duly incorporated in the financial proposal submitted to UNDP.

**Incomplete proposals may not be considered. The shortlisted candidates may be contacted and the successful candidate will be notified.**

## 8. FINANCIAL PROPOSAL

### **Price Proposal and Schedule of Payments:**

#### **The contract will be based on Daily Fee**

Consultant shall quote an **all-inclusive Daily Fee** for the contract period. The term “**all-inclusive**” implies that all costs (professional fees, communications, consumables, etc.) that could be incurred by the IC in completing the assignment are already factored into the daily fee submitted in the proposal. If applicable, travel or daily allowance cost (if any work is to be done outside the IC’s duty station) should be identified separately. Payments shall be done on a monthly basis based on actual days worked, upon verification of completion of deliverables and approval by the IC’s supervisor of a Time Sheet indicating the days worked in the period.

In general, UNDP shall not accept travel costs exceeding those of an economy class ticket. Should the IC wish to travel on a higher class he/she should do so using their own resources

In the event of unforeseeable travel not anticipated in this TOR, payment of travel costs including tickets, lodging and terminal expenses should be agreed upon, between the respective business unit and the Individual Consultant, prior to travel and will be reimbursed.

Travel costs shall be reimbursed at actual but not exceeding the quotation from UNDP approved travel agent. The provided living allowance will not be exceeding UNDP DSA rates. Repatriation travel cost from home to duty station in Bangkok and return shall not be covered by UNDP.

## 9. EVALUATION METHOD AND CRITERIA

Individual consultants will be evaluated based on the following methodology;

### **Cumulative analysis**

The award of the contract shall be made to the individual consultant whose offer has been evaluated and determined as a) responsive/compliant/acceptable; and b) having received the highest score out of set of weighted technical criteria (70%) and financial criteria (30%). Financial score shall be computed as a ratio of the proposal being evaluated and the lowest priced qualified proposal received by UNDP for the assignment.

**Technical Criteria for Evaluation (Maximum 70 points)**

- ) Criteria 1: Relevant education and experience- Max 15 points;
- ) Criteria 2: Years of relevant experience - Max 15 points;
- ) Criteria 3: Adequacy of competencies for the assignment - Max 30 points;
- ) Criteria 4: Regional experience - Max 10 points.

Only candidates obtaining a minimum of 49 points (70% of the total technical points) would be considered for the Financial Evaluation.