

TERMS OF REFERENCE – TOR

**International expert in Refrigeration and Air Conditioning with specific emphasis in
Certification Processes**



1. Background:

The United Nations Development Programme (UNDP) is one of the 4 Implementing Agencies (IA) designated by the Multilateral Fund (MLF) to implement the Montreal Protocol's Ozone Depletion Substances (ODS) phase-out projects. Under this International Treaty, the Article 5 countries committed to phase-out its ODS consumption, including the total phase-out of the HCFCs by the year 2040. Furthermore, the Parties to the Montreal Protocol agreed under the Decision XIX/6 on the "*Adjustment to the Montreal Protocol with regard to Annex C, Group I substances (HCFCs)*" to "*accelerate the phase-out of production and consumption of the hydrochlorofluorocarbons (HCFCs)*", and the Article 5 (A5) countries have been requested by the ExCom to adopt a staged approach to the implementation of their HCFC Phase-out Management Plans (HPMP).

The HPMPs involve:

- Assistance to determine related institutional, policy and legislation framework in line with strategies and action plans for compliance with the 1st Stage;
- Implementation of investment projects in the Polyurethane (PU) Foams sector for technological conversion of HCFC consumers (end-users);
- Verification of compliance met by the investment projects and finalization of activities (Project Closure Reports).

What's more, in order to further protect the climate, in October of 2016, during the 28th Meeting of the Parties to the Montreal Protocol on Substances that Deplete the Ozone Layer held in the capital of Rwanda, more than 170 countries agreed to amend the Protocol through what was called the "Kigali Amendment". The Kigali Agreement establishes specific targets and timetables to phase-down the production and consumption of HFCs, and carries an agreement by developed countries to help finance the transition of developing countries to climate-friendly substances, through a global commitment that will avoid more than 80 billion metric tons of carbon dioxide equivalent emissions by 2050.¹

This Term of Reference (TOR) identifies and specifies the scope of services required for the fulfillment of the components related to the development of Certification Processes for the air conditioning and refrigeration sectors, both the implementation of investment projects and the technical assistance and training, and, therefore, an Individual Contract for Framework Agreement (Long Term Agreement) will be established for the accomplishment of the duties for each of the selected consultants.

It is important to note that, at the time of the issuance of the IC that serves as the Framework Agreement, both parties understand that no financial obligation or commitment is formed on the part of UNDP, and that such an agreement is non-exclusive (i.e., it does not prohibit UNDP from entering into another such framework agreement with another individual or entity). Financial commitments will only be established each time the services are requested within the scope of the IC, through the agreed triggering action or document (Purchase Order) that signals the commencement of an engagement.

¹ Reference: <https://obamawhitehouse.archives.gov/the-press-office/2016/10/15/fact-sheet-nearly-200-countries-reach-global-deal-phase-down-potent>

This IC is intended for on-call intermittent engagement for a maximum of 300 working days spread over a period of 36 months (3 years). Any extension is subject to satisfactory performance review, project funding situation or other factors impacting the project operating environment.

2. Long Term Agreement Disclosure

UNDP at its own discretion showed interest to enter into a non-binding Framework Agreement/Long Term Agreement (LTA) as a result of this Individual Contract process under the following conditions:

- a) The supplier/contractor shall provide the types of services, goods and/or deliverables, quoted in his bidding, which shall be reflected in a non-binding Long Term Agreement in the form attached hereto as the "Model Long Term Agreement for the Provision of Goods and/or Services to the United Nations Development Programme".
- b) UNDP does not warrant that any quantity of Goods and/or Services will be purchased during the term of this arrangement.
- c) In the event of any advantageous technical changes and/or downward pricing of the Goods and/or Services during the duration of this Agreement, the Supplier/Contractor shall notify UNDP immediately. UNDP will consider the impact of any such event and may request an amendment to the Long Term Agreement.

3. Description of Responsibilities:

The Expert will work with UNDP, under the direct coordination of the Montreal Protocol Unit (MPU/BDP) Programme Coordinator, and with close collaboration with the Governments' National Ozone Units (NOU) of **Angola, Argentina, Barbados, Belize, Brazil, Bolivia, Colombia, Costa Rica, Cuba, Dominica, Ecuador, El Salvador, Guyana, Haiti, Honduras, Jamaica, Mexico, Panama, Paraguay, Peru, St. Kitts and Nevis, Trinidad and Tobago, Uruguay** to carry-on the following services:

4. Activities to be implemented under this LTA

- Deliver trainings on safe alternatives for HCFCs and HFCs
- Development of Certification Schemes, particularly based on alternatives to Montreal Protocol Controlled Substances
- Deliver trainings on Safe handling of Hydrocarbons as refrigerants
- Deliver trainings on Safe handling of leaks on RAC systems
- Development of Recovery, Recycling and Reclaiming Schemes
- Deliver trainings for Energy efficiency improvement for RAC systems
- Define, in cooperation with the NOU, and relevant consultant(s), a schedule for the implementation of the HPMPs;
- Analyze, in cooperation with the Government and the relevant stakeholders (the industry, government and academia, etc.) key inputs for the preparation of the annual work plans to be included in the UNDP Project Document;
- Prepare draft TORs for the HPMP implementation

5. Duration

The contract will enter effect upon signature by both parties, expected to extend for 2 (two) years of duration, with possibility of an extension for additional year(s) with a maximum of 300 working days.

6. Duty Station

Home based, with missions to the countries listed in Item 3. The dates listed for the missions are indicatives and may be subject to change.

7. Expected missions for the duration of the LTA.

In order to prepare his(er) financial offer, the consultant should quote five (5) five-day (5) missions to any of the following countries: Angola, Argentina, Barbados, Belize, Brazil, Bolivia, Colombia, Costa Rica, Cuba, Ecuador, El Salvador, Guyana, Honduras, Jamaica, Mexico, Panama, Paraguay, Peru, Trinidad and Tobago, Uruguay.

8. Fees

The consultant will receive payment based on daily fees, for the maximum of 300 (three hundred) working days under this assignment.

The candidate shall quote his/her services on a per diem amount basis or professional daily fees for services based on the deliverables identified below. All other mission travel related costs and other foreseeable mission related expenses must be quoted separately from the professional fee.

Missions which were not foreseen below shall be paid to the consultant as per IC Rules and Principles.

A Best value for Money approach will be used in the evaluation of the applicants and will lead to a combined score for technical capabilities and the financial offer.

The short-listed candidates, based on their technical capabilities, will receive the standard format that they must fill out to submit their financial offer

A total contract value, which shall be based on the unit price agreed by UNDP and the individual, will be agreed by both parties that will sign the IC, and the said contract amount shall serve as the maximum cumulative value that UNDP will place over the duration of the LTA.

9. Competencies

Corporate:

- Demonstrates integrity by modelling the UN's values and ethical standards;
- Promotes the vision, mission, and strategic goals of UNDP;
- Displays cultural, gender, religion, race, nationality and age sensitivity and adaptability
- Treats all people fairly without favoritism;
- Fulfills all obligations to gender sensitivity and zero tolerance for sexual harassment

Technical:

- Ability to analyses policy documents and make constructive policy suggestions;
- Strong interpersonal, communication and diplomatic skills, ability to work in a team;
- Capacity building skills and flexibility depending on the public;
- Demonstration of commitment to the Project's mission, vision and values;
- Good writing and reporting skills;
- Good presentation skills;
- Ability to work under pressure and stressful situations, and to meet tight deadlines.

Professionalism:

- Works toward creative solutions by analyzing problems carefully and logically – inspires and fosters innovation by highlighting innovative;
- Shares knowledge and is willing to provide support to others who request advice or help;
- Facilitates meetings effectively and efficiently;
- Resolves conflicts as they arise.

Client Orientation:

- Sets priorities, produces quality outputs, meets deadlines and manages time efficiently;
- Maintains strong relationships with partners and clients.

10. Qualifications and Requirements:

Education

- Engineering or equivalent degree in Mechanics, Chemistry, Electrical or related field;
- Advanced degree in relevant discipline is desirable and will be considered an asset;

Experience

- Working experience of at least 10 years in training/teaching/technical assistance of RAC systems design, installation, operation or maintenance;
- Working experience of at least 10 years in the use of refrigerants alternative to HCFC, with low GWP.
- Working experience of at least 5 years Energy Efficiency improvement of RAC systems
- Know-how and practice experience in the use of flammable refrigerants.
- Knowledge of Montreal Protocol related policy/issues is mandatory;
- Working experience with RAC investment/conversion projects in Latin American and Caribbean Countries is desirable;

Language

- Proficiency in English and Spanish

11. Application Procedures (Instructions to Applicants)

The application is a two-step process. Failing to comply with the submission process may result in disqualifying the applications:

Step 1: Interested individual consultants submit the following documents:

- **CV** 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 (the template can be downloaded from this link:
- **Brief description** of why the individual considers him/herself as the most suitable for the assignment. Indicate available start date.

Step 2: Submission of Financial Proposal:

Only applicants who attain a score of 70% and above on the technical evaluation will be contacted and requested to submit a financial proposal.

Scope of Price Proposal and Schedule of Payments:

- Financial proposals must be all inclusive and must be expressed on the basis of “a daily fee” in USD. using the financial proposal template available here: http://procurement-notices.undp.org/view_file.cfm?doc_id=45780. The proposals should be sent via email with the following subject heading: “**Financial Proposal for International expert in Refrigeration and Air Conditioning with specific emphasis in Certification Processes** ” by the deadline for this vacancy. Proposals to be received after the deadline may be rejected. In order to assist the requesting unit in the comparison of financial proposals, the financial proposal should be all-inclusive and include a breakdown.
- Payment will be made upon submission of a certificate of payment request, indicating outputs achieved and days worked to be verified and cleared for payment by the supervisor.

The term ‘all inclusive’ implies that all costs (professional fees, communications, utilities, consumables, insurance, etc.) that could possibly be incurred by the Contractor are already factored into the final amounts submitted in the proposal

In the case of unforeseeable travel, payment of travel costs including tickets, lodging and terminal expenses will be agreed upon, between UNDP and Individual Consultant, prior to travel and will be reimbursed. In general, UNDP

will 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.

12. Criteria for selection of individual consultant for award of contract:

The selection of the best offer from the shortlisted candidates will be based on a Combined Scoring method – where the qualifications and experienced will be weighted a maximum of 70 points and combined with the price offer which will be weighted a max of 30 points out of 100 points

Method: Cumulative analysis method will be used to evaluate proposals.

When using this weighted scoring method, the award of the contract will be made to the individual consultant whose offer has been evaluated and determined as:

- Responsive, compliant, acceptable; and
- Having received the highest score out of a pre-determined set of weighted technical and financial criteria specific to the solicitation

Technical Criteria weight: 70%

Financial Criteria weight: 30%

Technical Evaluation

Only those candidates that meet the minimum level of education, relevant years of experience and language requirements will be considered for the technical evaluation. The technical evaluation will be conducted by a desk review to select the shortlisted candidates (those that score at least 70 out of total 100 obtainable scores). The technical evaluation may also include interviews with shortlisted candidate(s).

Only applicants obtaining a minimum of 70 points on technical evaluation will be considered for the Financial Evaluation

ANNEX I
Evaluation Criteria

1. **Technical Capabilities (70%):** A Best value for Money approach will be used in the evaluation of the applicants, and will lead to a combined score for technical capabilities and the financial offer.

$$\frac{\text{Candidate Score} \times 0.70}{\text{Score of the best qualified candidate}}$$

Evaluation Criteria	Max Points
<i>Education and general experience</i>	
Engineering or equivalent degree in Mechanics, Chemistry, Electrical or related field...	10
Advanced degree in relevant discipline (<i>desirable</i>).....master's degree 15 pts Ph. D. degree 10 pts	25
Working experience of at least 10 years in training/teaching/technical assistance of RAC systems design, installation, operation or maintenance;	10
Working experience of at least 10 years in the use of refrigerants alternative to HCFC, with low GWP.	10
<i>Specific experience</i>	
Working experience of at least 5 years Energy Efficiency improvement of RAC systems	15
Know-how and practice experience in the use of flammable refrigerants	5
Knowledge of Montreal Protocol related policy/issues is mandatory	5
Working experience with RAC investment/conversion projects in Latin American and Caribbean Countries is desirable	5
Proficiency in English and Spanish	5
Interview	
Interview	10
Maximum Score	100

PS: Candidates with punctuation of 70 points or less will be disqualified

2. **Economic Proposal (30%):** The shortlisted candidates, based on their technical capabilities, will receive the standard format that they must fill out to submit their financial offer.

$$\frac{\text{Less Expensive Quotation} \times 0.30}{\text{Candidate Quotation}}$$

3. **Final Score:** The final score of the candidate will be calculated by the sum of the score under the Educational and Professional Background and the Economic Proposal

$$\text{Final Score} = (\text{Technical Capabilities}) + (\text{Economic Proposal})$$

Contract Award

Candidate obtaining the highest combined scores in the combined score of Technical and Financial evaluation will be considered technically qualified and will be offered to enter into contract with UNDP.

Institutional arrangement

The Consultant will be given access to relevant information necessary for execution of the tasks under this assignment;

The Consultant will be responsible for providing her/his own laptop.

Some travels to Dili, Timor-Leste (dates TBC) mentioned in the TOR are expected for this assignment;

Payments will be made upon satisfactory delivery of outputs, certification of payment form, and acceptance and confirmation by the Task Manager on outputs satisfactorily delivered.

Payment modality

- Payment to the Individual Contractor will be made based on the actual number of days worked, deliverables accepted and upon certification of satisfactory completion by the manager.
- Payments will be made upon satisfactory achieved deliverables and submission of time sheet in accordance with number of days worked and certification of payment. All payments are subject to the clearance and approval of the direct supervisor. The contract price is fixed regardless of changes in the cost of components.

References

Annexes (*click on the hyperlink to access the documents*):

Annex 1 - Financial Proposal Template

Annex 2 - IC Contract Template

Annex 3 – IC General Terms and Conditions