



## REQUEST FOR PROPOSAL (RFP)

### Consultancy Services of a Firm for the High-Level Webinar Series & Policy Research on Reimagining Inclusive Innovation in the Post-COVID-19 under the Pintig Lab Project

	DATE: <b>November 18, 2020</b>
	REFERENCE: <b>RFP-121-PHL-2020 (re-Tender)</b>

Dear Sir / Madam:

We kindly request you to submit your Proposal for the Consultancy Services of a Firm for the High-Level Webinar Series & Policy Research on Reimagining Inclusive Innovation in the Post-COVID-19

Please be guided by the form attached hereto as Annex 2, in preparing your Proposal.

Proposals may be submitted on or before 5:00 PM of **Friday, November 27, 2020** and via email

**Email address:** [bids.ph@undp.org](mailto:bids.ph@undp.org)

Your Proposal must be expressed in English, and valid for a minimum period of 90 days.

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. If you are submitting your Proposal by email, kindly ensure that they 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/protestandsanctions/>

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 : [http://www.un.org/depts/ptd/pdf/conduct\\_english.pdf](http://www.un.org/depts/ptd/pdf/conduct_english.pdf)

Thank you and we look forward to receiving your Proposal.

Sincerely yours,

**Karyll Angeles**  
*Procurement Associate*

## Description of Requirements

Context of the Requirement	<p>Governments and societies face a multitude of difficult and often complex challenges in making progress towards achieving the Sustainable Development Goals (SDGs). In a world characterized by rapidly evolving technologies, hyper-connectivity and changing socio-economic demographics, institutions need to provide accelerated and relevant responses to these challenges. Both public institutions and private organizations have difficulty keeping up with and adapting to 21st-Century challenges, and often find themselves in an ad hoc, reactive mode, leaving them unable to anticipate emerging issues and proactively propose solutions that mitigate risks and reduce inequality in society.</p> <p>This is particularly true today as the whole world is battling the Covid19 pandemic by engaging in the largest behavioral science experiment: “flattening the curve.” This has launched the Philippine government, the private sector, and civil society to prototype and test solutions on quarantine restrictions, data science and analytics, as well as design innovations that aim to stem the surge of infections, and provide the poor with much-needed social safety nets. While social distancing has been primarily prescribed to flatten the curve, this is close to impossible for millions of Filipino families who live in a cramped box in urban slums. As the Covid19 pandemic has surfaced the deep-seated inequalities in the Philippine society, so is the need for a focused, proactive, and intentional approach to inclusivity in proposing innovative policy and solutions for a post-Covid19 future.</p>
Implementing Partner of UNDP	N/A
Brief Description of the Required Services	<p>The purpose of this engagement is to support UNDP to provide a platform that will bring together a wide range of innovation stakeholders in order to deepen the conceptualization and strengthen institutionalization of inclusive innovation for sustainable development. With the current pandemic, participants can share knowledge and experience to help understand how Covid-19 is affecting the Philippines and propose new ways of mitigating its impact, anchored on the framework of Inclusive Innovation.</p> <p>More specifically, this engagement aims to:</p> <ol style="list-style-type: none"> <li>1. Promote inclusive innovation in the Philippines that considers the elements of direction, participation, access, and governance, thereby ensuring the inclusion of the needs of the wider society, particularly those that are marginalized or excluded.</li> <li>2. Provide a platform for dialogue among key sectoral representatives and thought leaders to participate in webinars or online fora that focuses on how inclusive innovation can be leveraged to respond well in the post-covid19 world.</li> <li>3. Seed the creation of an Inclusive Innovation Network in the Philippines through participation in learning sessions and discussions on an inclusive innovation framework, data-driven innovations and innovative approaches (e.g. futures thinking, horizon scanning, solutions mapping, etc).</li> <li>4. Collectively determine strategies and policy directions to inform and influence the future of inclusive governance in innovation in the Philippines.</li> </ol> <p>(See Terms of Reference)</p>

List and Description of Expected Outputs to be Delivered	<p>The Firm will accomplish the following key tasks:</p> <ol style="list-style-type: none"> <li> <b>1. Conduct of High-level Webinar Series and Inclusive Innovation Summit</b> <p>The firm will provide coordination and organization work in consultation with UNDP for the conduct of the online for a, webinars and a national summit. The series of online for a, webinar, and national summit will explore various covid19-related challenges. Leveraging UNDP's role as an integrator and convenor the activity will bring together thought leaders, key decision makers, and multisectoral representatives in a forum that will collectively take stock, reflect, and learn in order to respond better with more agility to the Covid-19 pandemic and future crises.</p> </li> <li> <b>2. Policy Research on Inclusive Innovation in the Philippines</b> <p>The firm will draft a policy brief in consultation with UNDP. The policy brief will present a summary of the proceedings and information on the topic, including key discussion points and insights, and courses of action. The objective of the Policy Brief is to advocate for a broader understanding and framework of Inclusive Innovation in the Philippines, ensuring that innovation is democratized for all.</p> </li> <li> <b>3. Inclusive Innovation Network Action Plan</b> <p>The firm will conduct research activities in order to draft the Inclusive Innovation Network Action Plan. Ensuring that the broader inclusive innovation conversation will take root in the country, the firm will draw concrete plans taken from the various commitments and resolutions from the resource speakers and participants from the online fora and webinars. This document shall include plans on growing grassroots innovation, public sector innovation, systems innovation, and the like.</p> </li> <li> <b>4. Communication strategy and materials</b> <p>The firm will draft a communications strategy to promote the events as well as the outputs of this engagement, the policy brief and the Inclusive Innovation Network Action Plan. More so, the firm will produce the necessary communication materials such as op-eds, blogs, videos, posters and other materials that will be agreed upon with UNDP.</p> </li> </ol>
Person to Supervise the Work/Performance of the Service Provider	The Head of Solutions Mapping, Accelerator Lab shall exercise supervision over the Firm. The Senior Policy Advisor of the Impact and Advisory Team (IAT) will provide oversight.
Frequency of Reporting	(See Terms of Reference)
Progress Reporting Requirements	(See Terms of Reference)
Location of work	Manila, Philippines.

Expected Duration of Work	5 months												
Target start date	November 2020												
Latest completion date	March 2021												
Facilities to be Provided by UNDP (i.e., must be excluded from Price Proposal)	<input checked="" type="checkbox"/> None.												
Implementation Schedule indicating breakdown and timing of activities/sub-activities	<input checked="" type="checkbox"/> Required												
Names and curriculum vitae of individuals who will be involved in completing the services	<input checked="" type="checkbox"/> Required.												
Currency of Proposal	<input checked="" type="checkbox"/> Local Currency: Philippine Peso												
Value Added Tax on Price Proposal	<input checked="" type="checkbox"/> must be exclusive of VAT and other applicable indirect taxes												
Validity Period of Proposals ( <i>Counting for the last day of submission of quotes</i> )	<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 on the Proposal.												
Partial Quotes	<input checked="" type="checkbox"/> Not permitted												
Payment Terms	The selected service provider shall be remunerated based on the following schedule of payment: <table border="1" data-bbox="485 1518 1416 1837"> <thead> <tr> <th colspan="4">Schedule of Payments</th> </tr> <tr> <th colspan="2">Deliverable/Output</th> <th>Target due date</th> <th>Percentage of contract price</th> </tr> </thead> <tbody> <tr> <td>1.</td> <td> <ul style="list-style-type: none"> <li>Submission of a workplan indicating the timelines and outputs and the communications strategy</li> <li>Conduct of Webinar 2 and submission of activity/event report</li> </ul> </td> <td>Month 1</td> <td>20%</td> </tr> </tbody> </table>	Schedule of Payments				Deliverable/Output		Target due date	Percentage of contract price	1.	<ul style="list-style-type: none"> <li>Submission of a workplan indicating the timelines and outputs and the communications strategy</li> <li>Conduct of Webinar 2 and submission of activity/event report</li> </ul>	Month 1	20%
Schedule of Payments													
Deliverable/Output		Target due date	Percentage of contract price										
1.	<ul style="list-style-type: none"> <li>Submission of a workplan indicating the timelines and outputs and the communications strategy</li> <li>Conduct of Webinar 2 and submission of activity/event report</li> </ul>	Month 1	20%										

		<ul style="list-style-type: none"><li>• Production and dissemination of communication materials</li><li>• Transcription of Webinar 1</li></ul>		
	2.	<ul style="list-style-type: none"><li>• Conduct of Webinar 3 and 4 and submission of activity/event report</li><li>• Production and dissemination of communication materials</li></ul>	Month 3	30%
	3.	<ul style="list-style-type: none"><li>• Submission of policy brief and Inclusive Innovation Network Action Plan</li></ul>	Month 4	30%
	4.	<ul style="list-style-type: none"><li>• Conduct of Inclusive Innovation Summit and submission of activity/event report</li><li>• Production and dissemination of communication materials</li></ul>	Month 5	20%
		TOTAL		
Person(s) to review/inspect/ approve outputs/completed services and authorize the disbursement of payment	The Programme Analyst, Programme Associate, Team Leader, of the Institutions and Partnerships will review/approve the outputs and authorize the disbursement of payment			
Type of Contract to be Signed	<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), where 700 points is the minimum passing score for the Technical Proposal. <input checked="" type="checkbox"/> Full acceptance of the UNDP Contract General Terms and Conditions (GTC). This is a mandatory criterion 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	<b>Technical Proposal (70%)</b> - (See Terms of Reference for allocation of points per criterion) <input checked="" type="checkbox"/> Expertise of the Contractor or Firm 200points <input checked="" type="checkbox"/> Methodology, Its Appropriateness to the Condition and Timeliness of the Implementation Plan 500 points <input checked="" type="checkbox"/> Management Structure and Qualification of Key Personnel 300 points  <b>Financial Proposal (30%)</b> To be computed as a ratio of the Proposal's offer to the lowest price among the proposals received by UNDP.			
UNDP will award the contract to:	<input checked="" type="checkbox"/> One and only one Local Firm			
Type of Contract to be Signed	<input checked="" type="checkbox"/> Contract Face Sheet (Goods and-or Services) UNDP			

Contract General Terms and Conditions <sup>1</sup>	<p><input checked="" type="checkbox"/> <b>General Terms and Conditions for de minimi contracts</b></p> <p><b>Applicable Terms and Conditions are available at:</b>  <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> <p><i>Non-acceptance of the terms of the General Terms and Conditions (GTC) may be grounds for disqualification from this procurement process</i></p>
Annexes to this RFP	<p><input checked="" type="checkbox"/> <b>Form for Submission of Proposal (Annex 2)</b></p> <p><input checked="" type="checkbox"/> <b>Detailed TOR (Annex 3)</b></p> <p><input checked="" type="checkbox"/> <b>Others</b>    <b>Annex 4 – Previous Relevant Experience/Track record</b>  <b>Annex 5 – Format for CV of Proposed Key Resources</b>  <b>Annex 6 – Financial Proposal Template</b></p>
Contact Person for Inquiries (Written inquiries only)	<p>[Name] : <b>Joseph Pangilinan</b>  [Designation] : <b>Procurement Assistant</b>  [Email] : <a href="mailto:procurement.ph@undp.org">procurement.ph@undp.org</a></p> <p>Email subject should be <u>RFP-121-PHL-2020 Consultancy Services of a Firm for the High-Level Webinar Series &amp; Policy Research on Reimagining Inclusive Innovation in the Post-COVID-19 under the Pintig Lab Project</u></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>
Documents to be Submitted	<p>As part of preliminary review, kindly upload the following documents in the e-tendering site:</p> <ul style="list-style-type: none"> <li>• Company Profile</li> <li>• Valid Business Licenses – Registration Papers, Tax Payment Certification, etc</li> <li>• Latest Audited Financial Statements from 2019 – income statement and balance sheet to indicate its financial stability, liquidity, credit standing, and market reputation, etc.</li> <li>• Track Record – list of clients for similar services as those required by UNDP, indicating description of contract scope, contract duration, contract value, contact references</li> <li>• Certificates and Accreditation – including Quality Certificates, Patent Registrations, Environmental Sustainability Certificates, etc, if any</li> <li>• 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</li> </ul>

<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.

FORM FOR SUBMITTING SERVICE PROVIDER'S PROPOSAL<sup>2</sup>

*(This Form must be submitted only using the Service Provider's Official Letterhead/Stationery<sup>3</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 for the year 2018 and 2019 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.*
- g) Letter of Satisfactory Completion from at least three (3) client of projects mentioned in Annex 4*

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

The Contractor is expected to integrate gender, human rights, and sustainable development goals principles in its approaches and methodologies.

The approaches and methodologies that will be employed within the partnership structure will be highly participatory and democratic in nature considering the voluntary nature of the

<sup>2</sup> This serves as a guide to the Service Provider in preparing the Proposal.

<sup>3</sup> Official Letterhead/Stationery must indicate contact details – addresses, email, phone and fax numbers – for verification purposes



partnership structure. The identification of members will be coming from the nominations from existing members as well as the identification of roster of on-call experts.

The mobilization of on-call experts and coaches will be based on an agreed upon schedule. They will act on support roles and always in coordination with the DILG-hired Regional Coordinator and UNDP-hired staff and consultants. The Roads2SDGs project will roll out capacity building activities for the experts from Academe and CSO and citizen monitors to capacitate them in the fulfilment of their tasks.

**C. Qualifications of Key Personnel**

, 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.**

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

Description of Activity	Remuneration per Unit of Time	Total Period of Engagement	No. of Personnel	Total Rate
<b>I. Personnel Services</b>				
1. Services from Home Office				
a. Expertise 1				
b. Expertise 2				
2. Services from Field Offices				
a. Expertise 1				
b. Expertise 2				
3. Services from Overseas				
a. Expertise 1				
b. Expertise 2				
<b>II. Out of Pocket Expenses</b>				
1. Travel Costs				
2. Daily Allowance				
3. Communications				
4. Reproduction				
5. Equipment Lease				
6. Others				
<b>III. Other Related Costs</b>				

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

*[Designation]*

*[Date]*

## **TERMS OF REFERENCE**

### **A. Background**

Governments and societies face a multitude of difficult and often complex challenges in making progress towards achieving the Sustainable Development Goals (SDGs). In a world characterized by rapidly evolving technologies, hyper-connectivity and changing socio-economic demographics, institutions need to provide accelerated and relevant responses to these challenges. Both public institutions and private organizations have difficulty keeping up with and adapting to 21st-Century challenges, and often find themselves in an ad hoc, reactive mode, leaving them unable to anticipate emerging issues and proactively propose solutions that mitigate risks and reduce inequality in society.

This is particularly true today as the whole world is battling the Covid19 pandemic by engaging in the largest behavioral science experiment: “flattening the curve.” This has launched the Philippine government, the private sector, and civil society to prototype and test solutions on quarantine restrictions, data science and analytics, as well as design innovations that aim to stem the surge of infections, and provide the poor with much-needed social safety nets. While social distancing has been primarily prescribed to flatten the curve, this is close to impossible for millions of Filipino families who live in a cramped box in urban slums. As the Covid19 pandemic has surfaced the deep-seated inequalities in the Philippine society, so is the need for a focused, proactive, and intentional approach to inclusivity in proposing innovative policy and solutions for a post-Covid19 future.

Given the wide range of innovations being proposed globally and within the Philippines, it is a good time to take stock, reflect, and learn from the emerging collective experience:

1. How did the lockdown affect our economy, society, public health, technology, and environment?
2. How will the accelerated use of big data science and analytics be leveraged to promote inclusive policymaking?
3. What policies and capabilities are needed to enable grassroots innovators to flourish and bridge them to the formality?
4. How will we effectively leverage digital technology to deliver fast, efficient, and inclusive social safety nets to fragile and vulnerable communities?
5. How do we ensure that post-Covid19 policies will support greener and more sustainable practices?
6. What are the needed innovative capabilities and approaches that have been effectively applied and how will all of these affect the future of innovation policy that ensures the achievement of the Sustainable Development Goals (SDGs)?

With this, UNDP will organize and deliver a series of webinars and online fora that will enlighten the abovementioned questions. These will lead to a high-level policy dialogue on inclusive innovation that seeks to review the current approaches on innovation in the Philippines – legislative, policy, institutional; explore the evolving regional and global experience with inclusive innovation; consider the covid-19 context, opportunities for sustainable and green futures, and strategic challenges and risks for adopting a more inclusive approach to innovation.

### **B. Objectives and Scope of Work**

The purpose of this engagement is to support UNDP to provide a platform that will bring together a wide range of innovation stakeholders in order to deepen the conceptualization and strengthen institutionalization of inclusive innovation for sustainable development. With the current pandemic, participants can share knowledge and

experience to help understand how Covid-19 is affecting the Philippines and propose new ways of mitigating its impact, anchored on the framework of Inclusive Innovation.

More specifically, this engagement aims to:

1. Promote inclusive innovation in the Philippines that considers the elements of direction, participation, access, and governance, thereby ensuring the inclusion of the needs of the wider society, particularly those that are marginalized or excluded.
2. Provide a platform for dialogue among key sectoral representatives and thought leaders to participate in webinars or online fora that focuses on how inclusive innovation can be leveraged to respond well in the post-covid19 world.
3. Seed the creation of an Inclusive Innovation Network in the Philippines through participation in learning sessions and discussions on an inclusive innovation framework, data-driven innovations and innovative approaches (e.g. futures thinking, horizon scanning, solutions mapping, etc).
4. Collectively determine strategies and policy directions to inform and influence the future of inclusive governance in innovation in the Philippines.

### **C. Duties and responsibilities of the Firm**

A Firm is sought to assist UNDP in fulfilling the abovementioned objectives.

The Firm will accomplish the following key tasks:

#### **1. Conduct of High-level Webinar Series and Inclusive Innovation Summit**

The firm will provide coordination and organization work in consultation with UNDP for the conduct of the online for a, webinars and a national summit. The series of online for a, webinar, and national summit will explore various covid19-related challenges. Leveraging UNDP's role as an integrator and convenor the activity will bring together thought leaders, key decision makers, and multisectoral representatives in a forum that will collectively take stock, reflect, and learn in order to respond better with more agility to the Covid-19 pandemic and future crises.

#### **2. Policy Research on Inclusive Innovation in the Philippines**

The firm will draft a policy brief in consultation with UNDP. The policy brief will present a summary of the proceedings and information on the topic, including key discussion points and insights, and courses of action. The objective of the Policy Brief is to advocate for a broader understanding and framework of Inclusive Innovation in the Philippines, ensuring that innovation is democratized for all.

#### **3. Inclusive Innovation Network Action Plan**

The firm will conduct research activities in order to draft the Inclusive Innovation Network Action Plan. Ensuring that the broader inclusive innovation conversation will take root in the country, the firm will draw concrete plans taken from the various commitments and resolutions from the resource speakers and participants from the online fora and webinars. This document shall include plans on growing grassroots innovation, public sector innovation, systems innovation, and the like.

#### **4. Communication strategy and materials**

The firm will draft a communications strategy to promote the events as well as the outputs of this engagement, the policy brief and the Inclusive Innovation Network Action Plan. More so, the firm will

produce the necessary communication materials such as op-eds, blogs, videos, posters and other materials that will be agreed upon with UNDP.

#### **D. Expected Outputs, Duration and Payment Schedule:**

The Firm will be engaged for 5 months and is expected to deliver the following outputs with an indicative schedule.

<b>Deliverables/Outputs</b>	<b>Target Due Dates</b>	<b>Review and Approvals Required</b>
<ul style="list-style-type: none"> <li>• Submission of a workplan indicating the timelines and outputs and the communications strategy</li> </ul>	One week after signing the agreement	Head of Solutions Mapping, Accelerator Lab and Senior Policy Advisor, IAT
<ul style="list-style-type: none"> <li>• Conduct of Webinar 2 and submission of activity/event report</li> <li>• Production and dissemination of communication materials</li> <li>• Transcription of Webinar 1</li> </ul>	Month 1	
<ul style="list-style-type: none"> <li>• Conduct of Webinar 3 and submission of activity/event report</li> <li>• Production and dissemination of communication materials</li> </ul>	Month 2	
<ul style="list-style-type: none"> <li>• Conduct of Webinar 4 and submission of activity/event report</li> <li>• Production and dissemination of communication materials</li> </ul>	Month 3	
<ul style="list-style-type: none"> <li>• Submission of policy brief and Inclusive Innovation Network Action Plan</li> </ul>	Month 4	
<ul style="list-style-type: none"> <li>• Conduct of Inclusive Innovation Summit and submission of activity/event report</li> <li>• Production and dissemination of communication materials</li> </ul>	Month 5	

#### **E. Institutional/Organizational Arrangement**

The Head of Solutions Mapping, Accelerator Lab shall exercise supervision over the Firm. The Senior Policy Advisor of the Impact and Advisory Team (IAT) will provide oversight. The Firm shall submit all outputs and course and/or copy all communications to the Head of Solutions Mapping, Accelerator Lab and IAT's Senior Policy Advisor, unless otherwise instructed.

The Firm shall report progress, provide updates, or raise issues on a bi-weekly basis. The Firm is expected to be accessible to through mobile and digital collaboration tools on an agreed schedule and when required.

Upon the direction of the Head of Solutions Mapping, Accelerator Lab, the Firm is expected to coordinate with officials, personnel, and consultants of UNDP, government agencies, CSOs, private sector partners, and other stakeholders for this engagement.

#### **F. Expected Duration of the Contract**

The project is expected to last for five (5) months upon contract signing.

## H. Location of Work

The location of work is in Metro Manila. However, for the duration of the Enhanced Community Quarantine (ECQ) period, the Firm is expected to implement this project with a Work From Home (WFH) arrangement for its personnel based in the Philippines in compliance with the rules and guidelines set by the Philippine Government's Inter-Agency Task Force on Emerging Infectious Diseases (IATF). For out of country personnel, the Firm is expected to implement the appropriate working arrangements that complies with the rules and guidelines of the respective jurisdictions where its personnel reside, especially those on physical distancing and home quarantines. Hence, meetings and coordination, whether regular or irregular, shall be conducted through digital collaboration and conferencing tools by default.

The Firm's personnel are expected to have their own workspace, facilities, computers, equipment, and licenses to digital tools from their own homes. UNDP shall not be responsible in providing these to the Firm and its personnel.

Should rules and guidelines on physical distancing and home quarantines be recalled or modified in the respective jurisdictions where personnel involved in this project reside, the UNDP and Firm shall exercise flexibility and prioritize the physical and mental wellbeing of all project personnel and stakeholders.

## I. Professional Qualifications of the Successful Contractor and its Key Personnel

The Firm. The successful contractor must meet all qualifications itemized below.

- a. A duly registered juridical entity, such as a sole proprietorship, partnership, corporation, or non-profit organization, whether Philippine-based or international;
- b. With 5 years expertise and experience in events management, research and policy advocacy

The Firm's Project Personnel.

The successful contractor must offer eight (8) personnel to this project who meet the minimum qualifications presented below. Please use the UNDP CV Form for all key and additional personnel as part of the Firm's technical proposal.

Position or role	Minimum qualifications
Event Project Coordinator	<ul style="list-style-type: none"><li>• With a bachelor's degree on social science, social development, public administration or any relevant course;</li><li>• Has a minimum of five (5) years of work experience in the field of event project coordination implementation, management, monitoring and reporting; and,</li><li>• Has successfully organized two (2) events related to development and public policy.</li><li>• Proficiency in English and Filipino</li></ul>
Policy Research Writer	<ul style="list-style-type: none"><li>• A master's degree in social science, public administration, social development or any other relevant course;</li><li>• At least 5 years of relevant research experience in the areas of inclusive innovation, social development, policy development;</li><li>• At least 5 years of experience working with government and/or multilateral development organization;</li><li>• Proficiency in English and Filipino</li></ul>

Communications Associate	<ul style="list-style-type: none"> <li>• With a bachelor's degree on development communications, broadcast communications or any relevant course;</li> <li>• Has a minimum of three (3) years of work experience in the field of communications particularly designing and layouting communication materials;</li> <li>• At least 3 years of experience in engaging with multiple stakeholders including governments, NGOs/CSOs, private sector, academe and international development organizations</li> <li>• Proficiency in English and Filipino</li> </ul>
Researcher & Documenter	<ul style="list-style-type: none"> <li>• A bachelor's degree in social science, public administration, social development or any other relevant course;</li> <li>• Minimum of 3 years of experience in qualitative and quantitative research in the areas of innovation, social development, public governance and other related fields;</li> <li>• Have at least one (1) year experience in documenting events and developing/writing documents such as project, proposals, correspondences, reports and others for local and national governments, NGOs, or civil society groups.</li> <li>• Proficiency in English and Filipino</li> </ul>

The Firm may, but is not required to, provide documentation for additional personnel. For the purpose of evaluating proposals, UNDP shall assess the qualifications of project personnel only for the four (4) roles enumerated above.

#### J. Price and Schedule of Payments

UNDP shall deliver payment to the Firm in tranches contingent on both delivery and acceptance and certification of the outputs as presented in the Schedule of Payments table below.

Payments shall only be made upon review, acceptance, and rectification of errors and/or improvement of the work or service as necessary.

Schedule of Payments			
Deliverable/Output		Target due date	Percentage of contract price
1.	<ul style="list-style-type: none"> <li>• Submission of a workplan indicating the timelines and outputs and the communications strategy</li> <li>• Conduct of Webinar 2 and submission of activity/event report</li> <li>• Production and dissemination of communication materials</li> <li>• Transcription of Webinar 1</li> </ul>	Month 1	20%
2.	<ul style="list-style-type: none"> <li>• Conduct of Webinar 3 and 4 and submission of activity/event report</li> <li>• Production and dissemination of communication materials</li> </ul>	Month 3	30%
3.	<ul style="list-style-type: none"> <li>• Submission of policy brief and Inclusive Innovation Network Action Plan</li> </ul>	Month 4	30%
4.	<ul style="list-style-type: none"> <li>• Conduct of Inclusive Innovation Summit and submission of activity/event report</li> <li>• Production and dissemination of communication materials</li> </ul>	Month 5	20%
<b>TOTAL</b>			<b>100%</b>

#### K. Criteria for Evaluation of the Proposal

Candidate Firms shall be evaluated in accordance with UNDP's Combined Scoring Method, whereby the Technical Proposal accounts for 70% and the Financial Proposal accounts for 30%.

The Financial Proposal will be computed as a ratio of the Proposal's offer to the lowest price among the proposals received by UNDP.

The evaluation of the Technical Proposal will be based on the following three (3) major criteria, as shown in the table below, for a total of 1,000 points. The minimum passing score for the Technical Proposal is 700 points.

The prospective Firm/s will be evaluated based on the following:

Summary of Proposal Evaluation		Maximum points obtainable
1	Experience specific to the requirement	200
2	Proposed methodology, approach and implementation plan	500
3	Management structure and key personnel	300
	Total	1000

Section 1. Experience specific to the requirement		Max points obtainable
1.1	General organizational capability and relevance of expertise and experience in events management, research and policy advocacy in the last five (5) years;	100
1.2	Has managed at least two projects related in any of the following: events management, research and policy advocacy <i>Minimum 70 points for 2 completed projects, additional points for additional projects, maximum of 100 points</i>	100
	<b>Total Section 1</b>	<b>200</b>

Section 2. Proposed methodology, approach and implementation plan		Max points obtainable
2.1	Proposed methodology and approach for the scoping study reflects an understanding of the requirement. The important aspects of the task have been addressed in sufficient detail.	250
2.2	Feasibility of the work plan, including alignment of the proposed work plan and schedule with the milestones indicated herein, appropriateness of the levels of effort for personnel to be assigned, and balance of early/on-time completion with assurance of quality.	250
	<b>Total Section 2</b>	<b>500</b>

Section 3. Management Structure and Key Personnel		Max Points Obtainable
3.1	<b>Event Project Coordinator</b>	
	With a bachelor's degree on any relevant course; <i>Minimum 14 points for bachelor's degree; additional points additional degree, maximum of 20 points</i>	20

Section 3. Management Structure and Key Personnel		Max Points Obtainable
	Has a minimum of five (5) years of work experience in the field of event project coordination implementation, management, monitoring and reporting; <i>Minimum 28 points for 5 years; Additional points for additional years, maximum of 40 points</i>	40
	Has successfully organized at least two (2) events related to development and public policy. <i>Minimum 14 points for 2 events organized; Additional points for other events organized, maximum of 20 points</i>	20
3.2	Policy Research Writer	
	A master's degree in social science, public administration, social development or any other relevant course; <i>Minimum 14 points for master's degree; additional points for additional degree, maximum of 20 points</i>	20
	At least 5 years of relevant research experience in the areas of inclusive innovation, social development, policy development; <i>minimum 28 points for 5 years; Additional points for additional years, maximum of 40 points</i>	40
	At least 5 years of experience working with government and/or multilateral development organization; <i>Minimum 14 points for 5 years; Additional points for additional years, maximum of 20 points</i>	20
3.3	Communications Associate	
	With a bachelor's degree on development communications, broadcast communications or any relevant course; Minimum 14 points for a bachelor's degree; additional points for additional degree, maximum of 20 points	20
	Has a minimum of three (3) years of work experience in the field of communications doing particularly designing and layouting communication materials Minimum 21 points for 3 years; Additional points for additional years, maximum of 30 points	30
	At least 3 years of experience in engaging with multiple stakeholders including governments, NGOs/CSOs, private sector, academe and international development organizations Minimum 14 points for 3 years; Additional points for additional years, maximum of 20 points	20
3.4	Researcher & Documenter	
	A bachelor's degree in social science, public administration, social development or any other relevant course; <i>Minimum 14 points for a bachelor's degree; additional points for additional degree, maximum of 20 points</i>	20
	Minimum of 3 years of experience in qualitative and quantitative research in the areas of innovation, social development, public governance and other related fields; <i>Minimum 21 points for 3 years; Additional points for additional years, maximum of 30 points</i>	30
	Have at least one (1) year experience in documenting events and developing/writing documents such as project, proposals, correspondences,	20



Section 3. Management Structure and Key Personnel		Max Points Obtainable
	reports and others for local and national governments, NGOs, or civil society groups <i>Minimum 21 points for 1 year experience; Additional points for additional years, maximum of 20 points</i>	
	<b>Total Section 2</b>	<b>300</b>

## ANNEX 4

### Previous Relevant Experience/Track Record

Please list only previous similar 5 assignments successfully completed in the last 5 years.

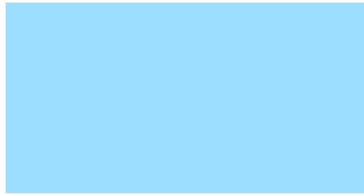
List only those assignments for which the Bidder was legally contracted or sub-contracted by the Client as a company or was one of the Consortium/JV partners. Assignments completed by the Bidder's individual experts working privately or through other firms cannot be claimed as the relevant experience of the Bidder, or that of the Bidder's partners or sub-consultants, but can be claimed by the Experts themselves in their CVs. The Bidder should be prepared to substantiate the claimed experience by presenting copies of relevant documents and references if so requested by UNDP.

Project name & Country of Assignment	Client & Reference Contact Details	Contract Value in PhP	Period of activity and status	Types of activities undertaken

## ANNEX 5

### Format for CV of Proposed Key resources

<b>Name of Personnel</b>	[Insert]
<b>Contact Details</b>	<ul style="list-style-type: none"> <li>▪ Present/Home Address: [Insert]</li> <li>▪ Email Address: [Insert]</li> <li>▪ Contact Numbers: [Insert]</li> </ul>
<b>Key achievements related to this assignment</b>	[Insert]
<b>Nationality</b>	[Insert]
<b>Language proficiency</b>	[Insert]
<b>Education/ Qualifications</b>	<p><i>[Summarize college/university and other specialized education of personnel member, giving names of schools, dates attended, and degrees/qualifications obtained.]</i></p> <p>[Insert]</p>
<b>Professional certifications</b>	<p><i>[Provide details of professional certifications relevant to the scope of services]</i></p> <ul style="list-style-type: none"> <li>▪ Name of institution: [Insert]</li> <li>▪ Date of certification: [Insert]</li> </ul>
<b>Employment Record/ Experience</b>	<p><i>[List all positions held by personnel (starting with present position, list in reverse order), giving dates, names of employing organization, title of position held and location of employment. For experiences, detail the type of activities performed, degree of responsibilities, location of assignments and any other information or professional experience considered pertinent for this assignment.]</i></p> <ul style="list-style-type: none"> <li>▪ Name of institution: [Insert]</li> <li>▪ Date of Employment: [Insert]</li> <li>▪ Position: [Insert]</li> <li>▪ Details of activities/functions performed: [Insert]</li> </ul> <ul style="list-style-type: none"> <li>▪ Name of institution: [Insert]</li> <li>▪ Date of Employment: [Insert]</li> <li>▪ Position: [Insert]</li> <li>▪ Details of activities/functions performed: [Insert]</li> </ul> <ul style="list-style-type: none"> <li>▪ Name of institution: [Insert]</li> <li>▪ Date of Employment: [Insert]</li> <li>▪ Position: [Insert]</li> <li>▪ Details of activities/functions performed: [Insert]</li> </ul>
<b>References</b>	<p><i>[Provide names, addresses, phone and email contact information for two (2) references]</i></p> <p>Reference 1:  Name:  Phone Number:  Email address:</p>



Reference 2:  
Name:  
Phone Number:  
Email address:

I, the undersigned, certify that to the best of my knowledge and belief, these data correctly describe my qualifications, my experiences, and other relevant information about myself and that I am available to undertake this project.

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Signature of Personnel

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Date (Day/Month/Year)

