



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

TO INTERESTED VENDORS/COMPANIES	DATE: February 10, 2021
	REFERENCE: UNDP-OFRM-RFP-2021-003

Dear Sir / Madam:

We kindly request you to submit your Proposal for **Actuarial Valuation of UNDP's Medical Insurance Plan (MIP) Liability, OFRM, UNDP.**

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

Proposals must be submitted on or before the deadline indicated by UNDP in the eTendering system. Bids must be submitted in the online eTendering system in the following link:

<https://etendering.partneragencies.org> using your username and password. If you have not registered in the system before, you can register now by logging in using the below credentials and follow the registration steps as specified in the system user guide.

Username: event.guest

Password: why2change

Your Proposal must be expressed in the 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. In submitting your Proposal by email, kindly ensure that they are signed and in the .pdf format, and free from any virus or corrupted files.

The Technical Proposal and Financial Proposal files **MUST BE COMPLETELY SEPARATE** and sent separately and clearly marked as either "TECHNICAL PROPOSAL" or "FINANCIAL PROPOSAL," as appropriate. Each document shall include the Proposer's name and address.

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 indicated herein. The mere act of submission of a Proposal implies that the Service Provider accepts without question the General Terms and Conditions of UNDP in this link: <http://www.undp.org/content/undp/en/home/procurement/business/how-we-buy.html>

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

Thank you and we look forward to receiving your Proposal.

Sincerely yours,



Ali Tahsin Jumah
Chief

Central Procurement Unit, New York
United Nations Development Programme

Annex 1

Description of Requirements

Context of the Requirement	Actuarial Valuation of UNDP's Medical Insurance Plan (MIP) Liability
Brief Description of the Required Services	UNDP would like to hire an experienced firm to undertake a study to provide an actuarial estimate of its liability under the MIP. The study will be repeated annually either with full census data or on a roll-forward basis in alternating years.
List and Description of Expected Outputs to be Delivered	Please refer to Section 5 of the Terms of Reference (Annex II).
Person to Supervise the Work/Performance of the Service Provider	Senior Manager of FPMR or Designate
Frequency of Reporting	<i>Daily reporting to the UNDP technical manager, Kuala Lumpur (mainly) and New York offices.</i>
Location of work	<input checked="" type="checkbox"/> At Contractor's Location
Expected duration of work	12 weeks from signing contract.
Target start date	1 May 2021
Latest completion date	31 July 2021
Travels Expected	Due to COVID-19 travel restrictions, the work will be performed remotely from the contractor's location. UNDP staff to be consulted with are primarily based in Kuala Lumpur with a few team members based in New York. All meetings and presentations will be conducted virtually.
Implementation Schedule indicating breakdown and timing of activities/sub-activities	<input checked="" type="checkbox"/> Required <input type="checkbox"/> Not Required
Names and curriculum vitae of individuals who will be involved in completing the services	<input checked="" type="checkbox"/> Required <input type="checkbox"/> Not Required
Currency of Proposal	<input checked="" type="checkbox"/> United States Dollars <input type="checkbox"/> Euro <input type="checkbox"/> Local Currency

Value Added Tax on Price Proposal ¹	<input type="checkbox"/> must be inclusive of VAT and other applicable indirect taxes <input checked="" type="checkbox"/> must be exclusive of VAT and other applicable indirect taxes															
Validity Period of Proposals (Counting for the last day of submission of quotes)	<input type="checkbox"/> 60 days <input checked="" type="checkbox"/> 90 days <input 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 <input type="checkbox"/> Permitted															
Payment Terms	<table border="1"> <thead> <tr> <th>Outputs</th><th>Percentage</th><th>Timing</th><th>Condition for Payment Release</th></tr> </thead> <tbody> <tr> <td>Delivery of report with results and recommendations of the MIP study</td><td>100%</td><td>12 weeks from contract signature</td><td>Within thirty (30) days from the date of meeting the following conditions: a) UNDP's written acceptance (i.e., not mere receipt) of the quality of the outputs; and b) Receipt of invoice from the Service Provider.</td></tr> <tr> <td colspan="3"></td><td></td></tr> </tbody> </table>				Outputs	Percentage	Timing	Condition for Payment Release	Delivery of report with results and recommendations of the MIP study	100%	12 weeks from contract signature	Within thirty (30) days from the date of meeting the following conditions: a) UNDP's written acceptance (i.e., not mere receipt) of the quality of the outputs; and b) Receipt of invoice from the Service Provider.				
Outputs	Percentage	Timing	Condition for Payment Release													
Delivery of report with results and recommendations of the MIP study	100%	12 weeks from contract signature	Within thirty (30) days from the date of meeting the following conditions: a) UNDP's written acceptance (i.e., not mere receipt) of the quality of the outputs; and b) Receipt of invoice from the Service Provider.													
Person(s) to review/inspect/approve outputs/complete d services and authorize the disbursement of payment	Payments will be processed upon finalization (and approval of UNDP Technical Manager) of the report that will include the results and recommendations of the MIP study.															
Criteria for Contract Award	<input checked="" type="checkbox"/> Highest Combined Score (based on the 70% technical offer and 30% price weight distribution) <input checked="" type="checkbox"/> Full acceptance of the UNDP Contract General Terms and Conditions (GTC). This is a mandatory 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																

¹ VAT exemption status varies from one country to another. Pls. check whatever is applicable to the UNDP CO/BU requiring the service.

	<p><u>Technical Proposal (70%)</u></p> <p><input checked="" type="checkbox"/> Expertise of the Firm 30%</p> <p><input checked="" type="checkbox"/> Methodology, Its Appropriateness to the Condition and Timeliness of the Implementation Plan 40%</p> <p><input checked="" type="checkbox"/> Management Structure and Qualification of Key Personnel 30%</p> <p><i>Only proposals that obtain at least 70% of the total of points obtainable during the desk review will be considered for financial evaluation.</i></p> <p><u>Financial Proposal (30%)</u></p> <p>To be computed as a ratio of the Proposal's offer to the lowest price among the proposals received by UNDP.</p>
UNDP will award the contract to:	<p><input checked="" type="checkbox"/> One and only one Service Provider</p> <p><input type="checkbox"/> One or more Service Providers, depending on the following factors</p>
Type of Contract to be Signed	<p><input type="checkbox"/> Purchase Order</p> <p><input checked="" type="checkbox"/> Contract Face Sheet (Goods and-or Services)</p> <p><input type="checkbox"/> Other Type/s of Contract</p>
Contract General Terms and Conditions ²	<p><input checked="" type="checkbox"/> General Terms and Conditions for contracts (goods and/or services).</p> <p><input type="checkbox"/> General Terms and Conditions for de minimum contracts (services only, less than \$50,000)</p> <p>Applicable Terms and Conditions are available at: http://www.undp.org/content/undp/en/home/procurement/business/how-we-buy.html</p>
Annexes to this RFP ³	<p><input checked="" type="checkbox"/> Annex II: Detailed ToR including MIP Rules</p> <p><input checked="" type="checkbox"/> Form A: Technical Proposal Submission Form</p> <p><input checked="" type="checkbox"/> Form B: Bidder Information Form (Returnable)</p> <p><input checked="" type="checkbox"/> Form C: Qualification Form (Returnable)</p> <p><input checked="" type="checkbox"/> Form D: Format of Technical Proposal (Returnable)</p> <p><input checked="" type="checkbox"/> Form E: Financial Proposal Submission Form (Returnable)</p> <p><input checked="" type="checkbox"/> Form F: Financial Proposal Form (Returnable)</p>

² 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.

Contact Person for Inquiries (Written inquiries only) ⁴	<i>Ignacio Inestal Fernandez</i> <i>Procurement Analyst</i> <i>Cpu.bids@undp.org</i> 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.
---	--

⁴ *This contact person and address is officially designated by UNDP. If inquiries are sent to other person/s or address/es, even if they are UNDP staff, UNDP shall have no obligation to respond nor can UNDP confirm that the query was received.*

Annex 2

Terms of Reference (ToR) for Actuarial Valuation of UNDP's Medical Insurance Plan (MIP) Liability

1. Background

The United Nations Development Programme (UNDP) is the global development network of the United Nations system and has offices in over 140 countries, with its Headquarters in New York, USA. UNDP's Bureau for Management Services (BMS) is a Central Bureau tasked with the development of corporate strategies, policies, tools and systems in key cross-cutting management areas. Drawing on sound analytics and a risk-management approach, BMS supports the achievement of development results through management advice, innovative business solutions, and other corporate services in line with international best practices and evolving needs and expectations of development partners. BMS also ensures policy adherence in operations management within UN Rules & Regulations, safeguarding UNDP's accountability vis-à-vis Member States and other stakeholders.

The Office of Financial Resources Management (OFRM) performs a pivotal role within BMS and within UNDP's global finance function, partnering with other bureaus and Country Offices. The primary role of OFRM is to maintain the financial integrity of UNDP through providing financial leadership, supporting the efficient and effective management of its financial resources, promoting financial sustainability and responsible resource allocation in the context of a fluctuating funding environment. This is accomplished by the development and implementation of sound financial policies and practices, oversight of corporate financial management performance, and flexible scalable support to resource allocation. OFRM is a key source of information for the Executive Board, General Assembly, to Partners and wider civil society. It supports transparency through the provision of on time and quality statutory and other financial reports that comply with international standards and regulatory guidelines including International Public Sector Accounting Standards (IPSAS) which UNDP adopted in 2012.

More information about UNDP can be obtained from the UNDP webpage: <http://www.undp.org>.

FPMR Unit is looking to hire an experienced and qualified accounting or consulting firm with experience in actuarial valuation of liabilities related to medical insurance plans.

2. Overview of UNDP's Medical Insurance Plan (MIP):

The "Medical Insurance Plan" (MIP) was established in 1987 by the General Assembly (GA) at its 41st session in accordance with United Nations (UN) Staff Regulation 6.2 and replaced the Medical Expense Assistance Plan (MEAP). It provides medical benefit to locally-recruited staff members (both in the General Service and National Officer categories) and former staff members (and their eligible family members) serving or residing at designated duty stations away from headquarters within the limits laid down in UNDP MIP rules.

The object of the MIP is to assist subscribers and their eligible family members in meeting expenses incurred for certain health services, facilities, and supplies that arise from sickness, accident, or maternity and that should be reimbursed within the limits laid down in MIP Rules.

Along with UNDP, the MIP plan also caters to local staff and retirees of several other UN agencies (UNU, UNFPA, UN Women, etc.).

It covers almost 9,000 active staff and 2,000 retiree families split evenly between UNDP and other UN agencies. Please refer to Annex for more information about MIP.

3. Funding for UNDP's MIP:

MIP premium rates for subscribers are set in the MIP rules. The staff premium is based on staff members net salary and number of dependents who are enrolled in the plan. Retiree premiums are based on net salary at retirement. MIP premiums (both organization's share and staff member's contribution) are collected through monthly local staff payroll. Premiums for retirees are collected automatically from monthly pension paid from the United Nations Joint Staff Pension Fund (UNJSPF) or locally in a country by the UNDP office in case of retirees who are not in receipt of a pension. An organizational portion is also collected from agencies for their retirees.

To ensure optimum efficiency and confidentiality, UNDP contracts the services of an external service provider for the professional administration of medical claims. The service provider, currently CIGNA, administers the MIP on behalf of UNDP in accordance with UNDP rules and procedures.

Payments for medical services rendered is paid directly by CIGNA for amounts exceeding USD 2,500. Smaller amounts are reimbursed to the retiree by UNDP as advised by CIGNA. Costs of managing the fund are also paid from the fund.

At the end of each year, the net deficit related to UNDP retirees enrolled in the Plan (expense less premiums) is transferred to UNDP's After Service Health Insurance (ASHI) fund. As such, this MIP fund balance represents the current MIP liability related to active participants and future ASHI liability for all non-UNDP participants.

4. Objective of Study:

UNDP would like to undertake a study to provide an actuarial estimate of its liability under the MIP and consider other issues related to its efficient administration. The study will be repeated annually either with full census data or on a roll-forward basis in alternating years.

5. Expected Outputs:

The main deliverable will be the final report and presentation to senior officials in the Office of Financial Resources Management. **The report will include the following, but is not limited to, the results and recommendations of the MIP study.**

- I. Present value of UNDP's liability under the MIP.
- II. Breakdown of the above showing gross liability, staff and retiree contributions and the net liability
- III. Breakdown of the above, showing amounts attributable to the retirees and active employees who are currently eligible to retire with ASHI benefits and active employees not currently eligible to retire with ASHI benefits
- IV. Breakdown of the above by UN Agency of the staff member or retiree
- V. Current service cost
- VI. Current interest cost
- VII. Actuarial gains and losses
- VIII. Sensitivity of UNDP's liability to changes in key assumptions, such as future interest rates, medical cost inflation, demographic changes, participation rates, etc.
- IX. Advice on current levels of employee and employer contribution rates
- X. Advice on longer-term management of fund balance and adjustment of rates. Recommendation on investment strategy for the MIP assets is not required.
- XI. Advice on segregation of fund flows and fund balances between active staff and retirees as well as UNDP and non-UNDP personnel.

6. Timing and Schedules

The study is expected to be delivered by 30 July 2021.

The report is expected to be completed within 12 weeks after work commences.

7. Institutional Arrangement

The Senior Manager of FPMR or designate will supervise the contractor. FPMR will provide the contractor with the necessary supporting employee data and other documents to conduct the study. The contractor will contact FPMR for any additional needs.

UNDP uses an external independent actuary firm to actuarially value liability for servicing the After Service Health Insurance (ASHI) benefit provided to its staff and retirees. The set of financial and demographic assumptions used for this valuation will be made available to the Contractor.

8. Location

The assignment is expected to be performed at the Contractor's location.

UNDP staff to be consulted with are primarily based in Kuala Lumpur with a few team members based in New York. All meetings and presentations can be conducted virtually, respecting local working hours.

9. Minimum Requirements

Please note that Technical Proposals that do not meet the minimum requirements indicated below ("required") may be directly disqualified:

- The Offeror presents at least 10 years in the field of actuarial valuation of liabilities, **required**.
- The Offeror has carried out at least 3 past actuarial projects involving populations over 1,000 employees during the past 5 years, **required**.
- The Offeror has carried out at least 3 projects which also recognized relevant IPSAS/or IFRS equivalent standards to demonstrate the capability to conduct actuarial liability studies in line with UNDP's financial reporting requirements, **required**.
- The Offeror has consulting experience managing international projects and client relationships, **required**.

When submitting the proposal, the Offeror must declare the following:

- The offeror is not under procurement prohibition by the United Nations, including but not limited to prohibitions derived from the Compendium of United Nations Security Council Sanctions Lists.
- The offeror has not been suspended, debarred, sanctioned or otherwise identified as ineligible by any UN Organization or the World Bank Group or any other international Organization.
- The offeror has no conflict of interest in undertaking this assignment; it does not employ, or anticipate employing, any person(s) who is, or has been a UN staff member within the last year, if said UN staff member has or had prior professional dealings with the firm in his/her capacity as UN staff member within the last three years of service with the UN (in accordance with UN post-employment restrictions published in ST/SGB/2006/15);
- The offeror has not declared bankruptcy, are not involved in bankruptcy or receivership proceedings, and there is no judgment or pending legal action against them that could impair their operations in the foreseeable future; and undertake not to engage in proscribed practices, including but not limited to corruption, fraud, coercion, collusion, obstruction, or any other unethical practice, with the UN or any other party, and to conduct business in a manner that averts any financial, operational, reputational or other undue risk to the UN and we embrace the principles of the United Nations Supplier Code of Conduct and adhere to the principles of the United Nations Global Compact.

6.2. Personnel

The bidder must provide a copy of the CVs of the personnel that will be working on this assignment. **If CVs are not provided, the bid may be directly disqualified.**

The team, which is envisaged to comprise **of at least a Lead and an Analyst**, should have demonstrated experience with a leading public consulting firm or similar large international organizations advising large public sector clients on actuarial valuation of medical insurance related liability. **Ideally, the team will not exceed a maximum of 4 members including the Team Lead.**

The Lead and the Analyst for the engagement must demonstrate the following qualifications and experience:

- Possession of a professional accounting or actuarial qualification from an internationally recognized institute of accountancy or actuaries with a **minimum of 10 years and 5 years of post-qualification experience is required for the Lead and Analyst, respectively.**
- Possession of an advanced (Masters) University Degree in Business Administration, Finance/Accounting or a relevant discipline is an added **advantage.**
- The Lead must possess sound and detailed understanding of IPSAS (or IFRS) utilized by international public sector organizations is **required.**
- At least 8 years' and 3 years of experience advising large public sector clients on actuarial valuation of insurance related liabilities is **required for the Lead and Analyst, respectively.**
- Demonstrated experience with international development and the UN system **is desirable.**

6.3 Methodology

The bidder must provide a description of the approach including how the various service elements will be 1) organized, 2) managed, 3) controlled and 4) delivered.

This section should demonstrate the bidder's responsiveness to the TOR by identifying the specific components proposed, addressing the requirements, providing a detailed description of the essential performance characteristics proposed and demonstrating how the proposed approach and methodology meets or exceeds the requirements.

10. Technical Evaluation Criteria

Technical proposals that conform to the list of minimum requirements indicated above will be considered for further technical evaluation based on the technical evaluation listed below. Only proposals that achieve at least 70% of the total of point obtainable will be considered during the financial evaluation stage.

Summary of Technical Proposal Evaluation Forms		Points Obtainable
1.	Bidder's qualification and experience	300
2.	Proposed Methodology, Approach and Implementation Plan	400
3.	Management Structure and Key Personnel	300
	Total	1000

Section 1. Bidder's qualification, capacity and experience		Points obtainable
1.1	Reputation of Organization and Staff Credibility / Reliability / Industry Standing	100
1.2	General Organizational Capability which is likely to affect implementation: management structure, financial stability and project financing capacity, project management controls, extent to which any work would be subcontracted	50
1.3	Relevance of the company's expertise in the of actuarial valuation of liabilities with regards to this specific UNDP assignment (the 3 listed relevant projects will be taken into account during the evaluation of this technical criterion)	100
1.4	Familiarity with international development and the UN system	50
Total Section 1		300

Section 2. Proposed Methodology, Approach and Implementation Plan		Points obtainable
2.1	Understanding of the requirement: Have the important aspects of the task been addressed in sufficient detail? Are the different components of the project adequately weighted relative to one another?	200
2.3	Details on how the different service elements shall be organized, controlled and delivered	100
2.5	Assessment of the implementation plan proposed including whether the activities are properly sequenced and if these are logical and realistic	100
Total Section 2		400

Section 3. Management Structure and Key Personnel		Points obtainable
3.1	Team Leader and Analyst: relevance of the educational background. (Advantage will be given to Master's)	40

3.2	Team Leader: relevance of the expertise and understanding of IPSAS or IFRS		60
3.3	Relevance of the experience advising large public sector clients on actuarial valuation of insurance related liabilities of the proposed personnel		100
3.4	Composition and structure of the team members proposed. Are the proposed roles of the team (excluding the Team Leader) of key personnel suitable for the provision of the necessary services?		50
3.5	Demonstrated experience with international development (especial advantage will be given if team members present development experience with the UN system).		50
Total Section 3			300

Annex II:

MIP Rules



MIP_Rules.pdf

Form A: Technical Proposal Submission Form

Name of Bidder:	[Insert Name of Bidder]	Date:	Select date
RFP reference:	[Insert RFP Reference Number]		

We, the undersigned, offer to provide the services for [Insert Title of services] in accordance with your Request for Proposal No. [Insert RFP Reference Number] and our Proposal. We are hereby submitting our Proposal, which includes this Technical Proposal and our Financial Proposal sealed under a separate envelope.

We hereby declare that our firm, its affiliates or subsidiaries or employees, including any JV/Consortium /Association members or subcontractors or suppliers for any part of the contract:

- a) is not under procurement prohibition by the United Nations, including but not limited to prohibitions derived from the Compendium of United Nations Security Council Sanctions Lists;
- b) have not been suspended, debarred, sanctioned or otherwise identified as ineligible by any UN Organization or the World Bank Group or any other international Organization;
- c) have no conflict of interest in accordance with Instruction to Bidders Clause 4;
- d) do not employ, or anticipate employing, any person(s) who is, or has been a UN staff member within the last year, if said UN staff member has or had prior professional dealings with our firm in his/her capacity as UN staff member within the last three years of service with the UN (in accordance with UN post-employment restrictions published in ST/SGB/2006/15);
- e) have not declared bankruptcy, are not involved in bankruptcy or receivership proceedings, and there is no judgment or pending legal action against them that could impair their operations in the foreseeable future;
- f) undertake not to engage in proscribed practices, including but not limited to corruption, fraud, coercion, collusion, obstruction, or any other unethical practice, with the UN or any other party, and to conduct business in a manner that averts any financial, operational, reputational or other undue risk to the UN and we *embrace the principles of the United Nations Supplier Code of Conduct and adhere to the principles of the United Nations Global Compact.*

We declare that all the information and statements made in this Proposal are true and we accept that any misinterpretation or misrepresentation contained in this Proposal may lead to our disqualification and/or sanctioning by the UNDP.

We offer to provide services in conformity with the Bidding documents, including the UNDP General Conditions of Contract and in accordance with the Terms of Reference

Our Proposal shall be valid and remain binding upon us for the period of time specified in the Bid Data Sheet.

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

I, the undersigned, certify that I am duly authorized by [Insert Name of Bidder] to sign this Proposal and bind it should UNDP accept this Proposal.

Name: _____

Title: _____

Date: _____

Signature: _____

[Stamp with official stamp of the Bidder]

Form B: Bidder Information Form

Legal name of Bidder	[Complete]
Legal address	[Complete]
Year of registration	[Complete]
Bidder's Authorized Representative Information	Name and Title: [Complete] Telephone numbers: [Complete] Email: [Complete]
Are you a UNGM registered vendor?	<input type="checkbox"/> Yes <input type="checkbox"/> No If yes, [insert UGNM vendor number]
Are you a UNDP vendor?	<input type="checkbox"/> Yes <input type="checkbox"/> No If yes, [insert UNDP vendor number]
Countries of operation	[Complete]
No. of full-time employees	[Complete]
Quality Assurance Certification (e.g. ISO 9000 or Equivalent) (If yes, provide a Copy of the valid Certificate):	[Complete]
Does your Company hold any accreditation such as ISO 14001 related to the environment? (If yes, provide a Copy of the valid Certificate):	[Complete]
Does your Company have a written Statement of its Environmental Policy? (If yes, provide a Copy)	[Complete]
Contact person UNDP may contact for requests for clarification during Proposal evaluation	Name and Title: [Complete] Telephone numbers: [Complete] Email: [Complete]
Please attach the following documents:	<ul style="list-style-type: none"> ▪ Company Profile, which should <u>not</u> exceed fifteen (15) pages, including printed brochures and product catalogues relevant to the goods/services being procured ▪ Certificate of Incorporation/ Business Registration ▪ Tax Registration/Payment Certificate issued by the Internal Revenue Authority evidencing that the Bidder is updated with its tax payment obligations, or Certificate of Tax exemption, if any such privilege is enjoyed by the Bidder ▪ Trade name registration papers, if applicable ▪ Local Government permit to locate and operate in assignment location, if applicable ▪ Official Letter of Appointment as local representative, if Bidder is submitting a Bid in behalf of an entity located outside the country ▪ Power of Attorney

Form C: Qualification Form

Name of Bidder:	[Insert Name of Bidder]	Date:	Select date
RFP reference:	[Insert RFP Reference Number]		

If JV/Consortium/Association, to be completed by each partner.

Historical Contract Non-Performance

☐ Contract non-performance did not occur for the last 3 years

☐ Contract(s) not performed for the last 3 years

Year	Non- performed portion of contract	Contract Identification	Total Contract Amount (current value in US\$)
		Name of Client: Address of Client: Reason(s) for non-performance:	

Litigation History (including pending litigation)

☐ No litigation history for the last 3 years

☐ Litigation History as indicated below

Year of dispute	Amount in dispute (in US\$)	Contract Identification	Total Contract Amount (current value in US\$)
		Name of Client: Address of Client: Matter in dispute: Party who initiated the dispute: Status of dispute: Party awarded if resolved:	

Previous Relevant Experience

Please list at least 3 past actuarial projects involving populations over 1,000 employees during the past 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	Period of activity and status	Types of activities undertaken

Bidders may also attach their own Project Data Sheets with more details for assignments above.

☐ Attached are the Statements of Satisfactory Performance from the Top 3 (three) Clients or more.

Financial Standing

Annual Turnover for the last 3 years	Year	USD
	Year	USD
	Year	USD
Latest Credit Rating (if any), indicate the source		

Financial information (in US\$ equivalent)	Historic information for the last 3 years		
	Year 1	Year 2	Year 3
	<i>Information from Balance Sheet</i>		
Total Assets (TA)			
Total Liabilities (TL)			
Current Assets (CA)			
Current Liabilities (CL)			
	<i>Information from Income Statement</i>		
Total / Gross Revenue (TR)			
Profits Before Taxes (PBT)			
Net Profit			
Current Ratio			

☐ Attached are copies of the audited financial statements (balance sheets, including all related notes, and income statements) for the years required above complying with the following condition:

- a) Must reflect the financial situation of the Bidder or party to a JV, and not sister or parent companies;
- b) Historic financial statements must be audited by a certified public accountant;
- c) Historic financial statements must correspond to accounting periods already completed and audited. No statements for partial periods shall be accepted.

Form D: Format of Technical Proposal

Name of Bidder:	[Insert Name of Bidder]	Date:	Select date
RFP reference:	[Insert RFP Reference Number]		

The Bidder's proposal should be organized to follow this format of Technical Proposal. Where the bidder is presented with a requirement or asked to use a specific approach, the bidder must not only state its acceptance, but also describe how it intends to comply with the requirements. Where a descriptive response is requested, failure to provide the same will be viewed as non-responsive.

SECTION 1: Bidder's qualification, capacity and expertise

- 1.1 Brief description of the organization, including the year and country of incorporation, and types of activities undertaken.
- 1.2 General organizational capability which is likely to affect implementation: management structure, financial stability and project financing capacity, project management controls, extent to which any work would be subcontracted (if so, provide details).
- 1.3 Relevance of specialized knowledge and experience on similar engagements done in the region/country. Please list at least 3 relevant projects carried out within the past 5 years.**
- 1.4 Quality assurance procedures and risk mitigation measures.

SECTION 2: Proposed Methodology, Approach and Implementation Plan

This section should demonstrate the bidder's responsiveness to the TOR by identifying the specific components proposed, addressing the requirements, providing a detailed description of the essential performance characteristics proposed and demonstrating how the proposed approach and methodology meets or exceeds the requirements. All important aspects should be addressed in sufficient detail and different components of the project should be adequately weighted relative to one another.

- 2.1 A detailed description of the approach and methodology for how the Bidder will achieve the Terms of Reference of the project, keeping in mind the appropriateness to local conditions and project environment. Details how the different service elements shall be organized, controlled and delivered.
- 2.2 The methodology shall also include details of the Bidder's internal technical and quality assurance review mechanisms.
- 2.3 Explain whether any work would be subcontracted, to whom, how much percentage of the work, the rationale for such, and the roles of the proposed sub-contractors and how everyone will function as a team.
- 2.4 Description of available performance monitoring and evaluation mechanisms and tools; how they shall be adopted and used for a specific requirement.
- 2.5 Implementation plan including a Gantt Chart or Project Schedule indicating the detailed sequence of activities that will be undertaken and their corresponding timing.
- 2.6 Demonstrate how you plan to integrate sustainability measures in the execution of the contract.
- 2.7 Any other comments or information regarding the project approach and methodology that will be adopted.

SECTION 2A: Bidder's Comments and Suggestions on the Terms of Reference

Provide comments and suggestions on the Terms of Reference, or additional services that will be rendered beyond the requirements of the TOR, if any.

SECTION 3: Management Structure and Key Personnel

- 3.1 Describe the overall management approach toward planning and implementing the project. Include an organization chart for the management of the project describing the relationship of key positions and designations. Provide a spreadsheet to show the activities of each personnel and the time allocated for his/her involvement.
- 3.2 Provide CVs for key personnel that will be provided to support the implementation of this project using the format below. CVs should demonstrate qualifications in areas relevant to the Scope of Services.

Format for CV of Proposed Key Personnel

Name of Personnel	[Insert]
Position for this assignment	[Insert]
Nationality	[Insert]
Language proficiency	[Insert]
Education/ Qualifications	<i>[Summarize college/university and other specialized education of personnel member, giving names of schools, dates attended, and degrees/qualifications obtained.]</i>
	[Insert]
Professional certifications	<i>[Provide details of professional certifications relevant to the scope of services]</i>
	<ul style="list-style-type: none"> ▪ Name of institution: [Insert] ▪ Date of certification: [Insert]
Employment Record/ Experience	<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 experience in last five years, 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>
	[Insert]
References	<i>[Provide names, addresses, phone and email contact information for two (2) references]</i>
	Reference 1: [Insert] Reference 2: [Insert]

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.

Signature of Personnel

Date (Day/Month/Year)

Form E: Financial Proposal Submission Form

Name of Bidder:	[Insert Name of Bidder]	Date:	Select date
RFP reference:	[Insert RFP Reference Number]		

We, the undersigned, offer to provide the services for [Insert Title of services] in accordance with your Request for Proposal No. [Insert RFP Reference Number] and our Proposal. We are hereby submitting our Proposal, which includes this Technical Proposal and our Financial Proposal sealed under a separate envelope.

Our attached Financial Proposal is for the sum of [Insert amount in words and figures].

Our Proposal shall be valid and remain binding upon us for the period of time specified in the Bid Data Sheet.

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

Name: _____
Title: _____
Date: _____
Signature: _____

[Stamp with official stamp of the Bidder]

Form F: Financial Proposal Form

Name of Bidder:	[Insert Name of Bidder]	Date:	Select date
RFP reference:	[Insert RFP Reference Number]		

The Bidder is required to prepare the Financial Proposal following the below format and submit it in an envelope separate from the Technical Proposal as indicated in the Instruction to Bidders. Any Financial information provided in the Technical Proposal shall lead to Bidder’s disqualification.
The Financial Proposal should align with the requirements in the Terms of Reference and the Bidder’s Technical Proposal.

Currency of the proposal: USD

Table 1: Summary of Overall Prices

	Amount(s)
Professional Fees (from Table 2)	
Other Costs (from Table 3)	
Total Amount of Financial Proposal	

Table 2: Breakdown of Professional Fees

Name	Position	Fee Rate	No. of Days/ hours	Total Amount
		A	B	C=A+B
Subtotal Professional Fees:				

Table 3: Breakdown of Price per Deliverable/Activity

Deliverable/ Activity description	Time (person days)	Professional Fees	Other Costs	Total
Delivery of report with results and recommendations of the MIP study				