

Terms of Reference

Position title:	International Consultant - Portfolio Management Specialist
Agency:	Regional Innovation Centre, UNDP Bangkok Regional Hub
Project title:	System transformation across Asia and the Pacific
Duty Station:	Home-based, no travel required.
Duration:	14 April 2022 – 31 January 2023 (maximum 110 working days)

1) PROJECT DESCRIPTION AND BACKGROUND

UNDP works with countries to expand people's choices for a fairer, sustainable future, to build the world envisioned by the 2030 Agenda for Sustainable Development with planet and people in balance. As shown by the UNDP's Strategic Plan 2022-2025, the challenge of the next four years is to accelerate and scale up development results significantly, bringing the Sustainable Development Goals back within reach. Towards that end, UNDP will support change in three directions:

- Structural transformation, particularly green, inclusive and digital transitions;
- Leaving no one behind, a rights-based approach centred on human agency and human development;
- Building resilience to respond to systemic uncertainty and risk.

These are huge, whole-of-society puzzles that require collective efforts and integrated approaches. To be an effective partner in transformative change, UNDP has to build not just new skills, like systems thinking, but a new culture: one that embraces complexity, actively manages risk, continually adapts and seeks to learn alongside delivering results.

UNDP will look beyond sectoral challenges for opportunities for transformative change. It will continue to deliver projects, but will increasingly plan, align and manage them as portfolios comprising a mix of short, medium- and long-term interventions, supported by research, advocacy and investment. A portfolio approach means understanding issues from a systems perspective, leveraging linkages across interventions to achieve broader goals. This requires a different risk appetite, prepared to explore innovative options.

The Regional Innovation Centre (RIC) based at the UNDP Bangkok Regional Hub, has been established by UNDP Asia-Pacific to leverage innovation to generate new development responses and robust development solutions, by developing new products, services and offers, new ways of solving development issues across the Governments and Country Offices within the UNDP Asia Pacific Region. The Centre provides a safe space to test development solutions through portfolios of policy experiments, new and innovative products and through scaling best practise solutions that exist within the region. The RIC works to foster an innovative culture that helps the UNDP, governments and other partners be on the front foot of spotting, understanding, and integrating new development approaches into their work. The Centre has a key role in helping deliver on the UNDP Strategic Plan 2022 – 2025 which has systems transformation, strategic innovation and digital transformation at its core.

Over the past two years, the RIC has been actively working with several Country Offices and city governments applying system-based approaches leading to design of several comprehensive and contextualized portfolios serving as foundation for system transformation in the respective jurisdictions. Based on this field work, the RIC has developed an in-house "Guidebook for Adopting Portfolio Approaches" to support organization efforts aimed at transformational change in the region and beyond.

2) SCOPE OF WORK

The Regional Innovation Centre (RIC) based in Bangkok, Thailand, established by UNDP Asia-Pacific, has been working to continuously develop and iterate its in-house portfolio approach to help Country Offices

and other stakeholders in developing their capability to deal with complex challenges through supply of coherent policy options and inclusive community engagement. The RIC's Guidebook outlines this approach through the "Sense&Frame - Engage&Position - Transform" framework. The RIC took a staggered approach in the process, with some portfolios already being in transform phase moving into experimentation and then to scale. The consultant will work closely with the Portfolio Impact and Learning Specialist on delivering this work. The role of this assignment is to support RIC and selected COs to deliver and manage a selected group of portfolios in a coherent manner, to ensure cities and COs learn and adapt portfolio execution to achieve higher impact, and can build sustainable coalitions for delivery.

The scope of work includes three complementing and iteratively delivered segments:

Portfolio Execution and Adaptive Management

1. Draft portfolio execution and management framework to support portfolio implementation, inclusive but not limited to:
 - (a) Direction, prioritization, sequencing and ensuring executive coherence (including experiments) across portfolio through the implementation cycle, underpinned by method, guiding principles, criteria, etc.
 - (b) Dynamic sense-making and decision-making mechanism, including based on the implemented experiments and activities.
 - (c) Options for corrective action and adaptation throughout implementation with reference to long-term outcomes and short-term results framework, developed in collaboration with the Impact and Learning Specialist.
 - (d) Re-alignment and guidance for stakeholder and partner coordination, including institutional set-up for portfolio implementation.
 - (e) Continuous review of relevant work by other organizations or UNDP regional/thematic teams and knowledge exchange with them.
2. Remote advisory support in implementation of the selected portfolio using suggested framework through:
 - (a) Periodical check-ins with the RIC and CO teams.
 - (b) Adaptation of the framework based on the learning from executed pilots, and RIC and COs' feedback.
 - (c) Content support for stakeholder and partners engagement as much as portfolio management is concerned.
 - (d) Support ongoing codification of the process through joint blogs, briefs, webinars, and other relevant knowledge products.
 - (e) Continuous exploration of external partnerships around "portfolio management" learning.
3. Finalization of the portfolio management framework:
 - (a) Codification of the framework based on the first cycle of experimentation and implementation.
 - (b) Recommendations for portfolio scaling and impact measurement.
 - (c) Support in adaptation and integration of the management framework into the RIC's Guidebook for Adopting Portfolio Approaches to be used as a metamodel for use by other teams and organizations.
 - (d) Support development of the final review brief and presentation (blog, op-ed, etc.).

3) EXPECTED OUTPUTS AND DELIVERABLES

The expected outputs and deliverables will be agreed between the Consultant and the Regional Innovation Specialist and/or the Programme Specialist – Innovation & Knowledge, UNDP Bangkok Regional Hub, while working with the team members of the portfolio teams across the COs. Deliverables will be reviewed and approved upon the delivered quality by the Regional Innovation Specialist and/or the Programme Specialist – Innovation & Knowledge, UNDP BRH. The contractor is expected to deliver:

OUTPUTS/DELIVERABLES	ESTIMATED DURATION TO COMPLETE	TARGET DUE DATES
Deliverable 1: Research Plan and Positioning Brief (Review of existing approaches and outline of the next steps and methods to be used)	10 days	2 nd May 2022
Deliverable 2: Draft Frameworks developed for mapping, execution strategy and management	15 days	25 th May 2022
Deliverable 3: Test the framework with the most advanced portfolio (Pasig City) and contribute to the Guidebook	20 days	5 th September 2022
Deliverable 4: Test the management framework with the other 2-3 portfolios and capture the process and learnings in a report	25 days	3 rd November 2022
Deliverable 5: Finalize the framework and support its integration into the Guidebook, in collaboration with the Impact and Learning Specialist.	20 Days	15 th December 2022
Deliverable 6: Deliver adjacent knowledge and cross-portfolio learning products (at least 2 blogs, 4 briefs, 5 webinars, 1 presentation) and support portfolios' positioning, as required.	20 days	25 th January 2023
	110 Days	

4) DURATION OF ASSIGNMENT, DUTY STATION, EXPECTED PLACES OF TRAVEL, AND INSTITUTIONAL ARRANGEMENT

- **Duration:** 14th April 2022 – 31st January 2023 (maximum 110 working days)
- **Duty station:** The consultant will be home-based. No travel is required for this assignment.
- **Expected places of travel:** not required.
- **Institutional arrangement:**
 - ✓ The consultant will work closely with the RIC and portfolio teams across the COs, and under the direct supervision of the Regional Innovation Specialist and/or the Programme Specialist – Innovation & Knowledge, UNDP Bangkok Regional Hub and working closely with the project leads for each project.
 - ✓ Regional Innovation Specialist and/or the Programme Specialist – Innovation & Knowledge, UNDP Bangkok Regional Hub will review and approve the consultant's deliverables.
 - ✓ The Consultant will be given access to relevant information necessary for execution of the tasks under this assignment, and will be responsible for providing her/his own working station (i.e. laptop, internet, phone, scanner/printer, specific software, etc.) and must have access to a reliable internet connection.

5) EXPECTED DELIVERABLES, SCOPE OF PRICE, AND SCHEDULE OF PAYMENTS

The candidates must submit a **financial proposal based on a lump sum amount**. The total amount quoted shall be all-inclusive of all costs components required to perform the work and complete deliverables identified in the Terms of Reference (ToR). This includes professional fee, communications, consumables, and any other applicable cost to be incurred by the consultant in completing the assignment. The contract price will be fixed output-based price regardless of extension of the herein specified duration.

In the event of unforeseeable travel not anticipated in this TOR, payment of travel costs including tickets, lodging and terminal expenses should be agreed upon, between the respective business unit and the Individual Consultant, prior to travel and will be reimbursed based on UNDP rules and regulations. In general, UNDP shall not accept travel costs exceeding those of an economy class ticket. Should the IC wish to travel on a higher class he/she should do so using their own resources.

Schedule of Payments:

Payment will be made after satisfactory acceptance and certification of the deliverables and in accordance with UNDP procedures as per below percentages:

OUTPUTS/DELIVERABLES	TARGET DUE DATES	PAYMENT TERMS	REVIEW AND APPROVALS REQUIRED
Deliverable 1: Research Plan and Positioning Brief (Review of existing approaches and outline of the next steps and methods to be used)	2 nd May 2022	10%	Regional Innovation Specialist and/or the Programme Specialist – Innovation & Knowledge (Asia-Pacific), UNDP BRH
Deliverable 2: Draft Frameworks developed for mapping, execution strategy and management	25 th May 2022	10%	
Deliverable 3: Test the framework with the most advanced portfolio (Pasig City) and contribute to the Guidebook	5 th September 2022	15%	
Deliverable 4: Test the management framework with the other 2-3 portfolios and capture the process and learnings in a report	3 rd November 2022	25%	
Deliverable 5: Finalize the framework and support its integration into the Guidebook, in collaboration with the Impact and Learning Specialist.	15 th December 2022	20%	
Deliverable 6: Deliver adjacent knowledge and cross-portfolio learning products (at least 2 blogs, 4 briefs, 5 webinars, 1 presentation) and support portfolios' positioning, as required.	25 th January 2023	20%	

Note: Deliverable 1 is to be developed in coordination with the Impact and Learning Specialist. They will bring the angle of communications, knowledge management, learning matrices and impact measurement of the workstream and the Portfolio Management consultant will incorporate approaches of management, coordination, and coherence of the portfolios.

6) DEGREE OF EXPERTISE AND MINIMUM QUALIFICATIONS

- **Education:** Minimum Bachelor's degree in Management, Social Sciences, International Development, Environmental Science, Transition or Complexity Science, Engineering, Design (e.g., industrial or service design, architecture, urban planning), Psychology or a related area.
- **Experience:**
 - ✓ Minimum of 7 years of relevant progressively responsible work experience at the national and international levels in development programming or policy; social innovation and impact measurement; engagement (public and private sector).
 - ✓ Minimum 3 years of demonstrated experience in applying advanced framework to management and impact assessment in system change and/or portfolio initiatives (at least 3 projects) in a specific policy area (or social issue);
 - ✓ Demonstrated ability in running co-design sessions and facilitating cross-team learning (minimum 3 sessions conducted);
 - ✓ Demonstrated ability to work with clients through previous experience of working with minimum 3 different clients/ teams, to help surface unarticulated needs is an added value;
 - ✓ Existing networks with system change and portfolio management globally is an asset;
 - ✓ Knowledge of various Monitoring, Evaluation and Learning frameworks and methodologies is an asset;
 - ✓ Demonstrated ability to work with systems and portfolio approaches and methodologies is an asset;

- **Language:** Fluency in English, both written and oral
- **Core competencies:**
 - ✓ Innovation: Ability to make new and useful ideas work
 - ✓ Leadership: Ability to persuade others to follow
 - ✓ People Management: Ability to improve performance and satisfaction
 - ✓ Communication: Ability to listen, adapt, persuade and transform
 - ✓ Delivery: Ability to get things done while exercising good judgement
 - ✓ Entrepreneurial attitude: willing to get stuck in to get things done.
- **Technical/Functional competencies:**
 - ✓ Design Thinking: Knowledge of design thinking models and facilitation approaches and ability to apply in diverse settings
 - ✓ Knowledge Management: Ability to capture, develop, share and effectively use information and knowledge
 - ✓ Project management skills: Ability to plan, manage and execute on time and professionally
 - ✓ Strategic thinking: Able to “connect the dots” and see patterns and opportunities from work
 - ✓ Strong client focus: Listen and adapt to client needs
 - ✓ Communication: A strong communicator both within teams but also with clients.

7) CRITERIA FOR SELECTION OF INDIVIDUAL CONSULTANT FOR AWARD OF CONTRACT

Evaluation Method and Criteria

Cumulative Analysis: The candidates will be evaluated through Cumulative Analysis method. When using the 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 set of weighted combine technical evaluation of desk review and interview (70%), and financial criteria (30%). Financial score shall be computed as a ratio of the proposal being evaluated and the lowest priced proposal received by UNDP for the assignment.

Technical evaluation (70%)

Criteria	Max. points
Desk review for technical evaluation	
Bachelor’s degree in Social Sciences, International Development, Environmental Science, Transition or Complexity Science, Engineering, Design (e.g., industrial or service design, architecture, urban planning), Psychology or a related area.	10
Minimum of 7 years of relevant progressively responsible work experience at the national and international levels in development programming or policy; social innovation and impact measurement; engagement (public and private sector).	25
Minimum 3 years of demonstrated experience in applying advanced framework to management and impact assessment in system change and/or portfolio initiatives (at least 3 projects) in a specific policy area (or social issue);	25
Demonstrated ability in running co-design sessions and facilitating cross-team learning	10
Demonstrated ability to work with clients through previous experience of working with clients/ teams, to help surface unarticulated needs is an added value	10
Technical methodology	20
Total Desk Review for technical evaluation	100

Interview	50
GRAND TOTAL	150

*****Only candidates obtaining a minimum of 70 points or above in the Desk review would be considered for the interview**

Financial Evaluation (30%)

Financial proposals from all technically qualified candidates will be scored out 30 marks based on the formula provided below. The maximum marks (30) will be assigned to the lowest financial proposal. All other proposals will receive points according to the following formula:

- $p = y (\mu/z)$.

Where:

- p = points for the financial proposal being evaluated;
- y = maximum number of points for the financial proposal;
- μ = price of the lowest priced proposal;
- z = price of the proposal being evaluated.

Contract award: Applicant receiving the Highest Combined Score and has accepted UNDP's General Terms and Conditions will be awarded the contract.

8) APPLICATION PROCEDURE/RECOMMENDED PRESENTATION OF OFFER

Instructions to Applicants: Click on the "**Apply now**" button. Input your information in the appropriate Sections: personal information, language proficiency, education, resume and motivation. Upon completion of the first page, please hit "submit application" tab at the end of the page then the uploading option for the required document will be available.

Please group all your document into one (1) single PDF document as the application system only allows to upload maximum one document.

Interested candidates must submit the following documents/information to demonstrate their qualifications. Please group them into one (1) single PDF document:

1. **Letter of Confirmation of Interest and Availability with Financial Proposal** (in USD) using the template provided as **Annex III**

Financial proposal: Consultant shall quote an all-inclusive fixed total contract price, supported by a breakdown of costs, as per template provided for the entire assignment. The term "all-inclusive" implies that all costs (professional fees, communications, consumables, etc.) that could be incurred by the IC in completing the assignment are already factored into the proposed fee submitted in the proposal.

If an Offeror is employed by an organization/ company/ institution, and he/she expects his/her employer to charge a management fee in the process of releasing him/her to UNDP under Reimbursable Loan Agreement (RLA), the Offeror must indicate at this point, and ensure that all such costs are duly incorporated in the financial proposal submitted to UNDP.

2. **P11 / Personal 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 with contact details.

3. **Brief technical proposal** (methodology, approach and implementation plan, proving knowledge on Monitoring, Evaluation and Learning frameworks, and/or existing network and familiarity with system change and portfolio approach) that meets or exceeds the requirements of the TOR.

****Failure to submit the above-mentioned documents or Incomplete proposals shall result in disqualification**

****Please group all your document into one (1) single PDF document as the application system only allows to upload maximum one document.**

The short-listed candidates may be contacted, and the successful candidate will be notified.