

TERMS OF REFERENCE

Position title:	International Consultant - Change Agent: Competences and Culture for System Change and Portfolios
Position type:	International Consultant
Project title:	System transformation across Asia and the Pacific
Agency:	Regional Innovation Centre, UNDP Bangkok Regional Hub
Country of assignment:	Home-based, no travel required.
Duration:	1 October 2022 – 30 April 2023

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 RIC 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 the 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 the transform phase moving into experimentation, and then to scale. At the same time, partner organizations very well realize that advancing system change and implementing portfolios requires more than the adoption of innovative methods like system thinking or portfolio design. More than that, it requires a shift in the way public organizations approach their work, by changes in competencies (skills, knowledge, and mindsets), and organizational culture. The role of this assignment is to jointly with the Portfolio Management Specialist, Impact & Learning Specialist to support RIC and the core teams at three UNDP Country Offices and local governments in delivering a selected group of portfolios, by facilitating and documenting the emergence and institutionalization of competences and cultures (C&C).

The scope of work includes three major segments under 2 interlinked dimensions: Competences and Culture for Transformation based on:

1. Understanding the current landscape and emerging practice in the contexts of system change initiatives undertaken by UNDP RIC:
 - What are the key constituent elements and drivers behind the current organizational landscape in those 2 dimensions?
 - Are there emerging practices that facilitate, and support adoption of the system change initiatives in the public organizations? What drives them and what obstructs them? What mindsets are required? What skills and knowledge are needed and how they have been developed? How they compare and what they can learn from international practice?
 - What are the past experiences around strategic, cross-sector, reform or change management initiatives undertaken by senior leadership and is there organizational learning mechanism in place to encourage and support fostering/institutionalization of those initiatives?
2. Based on the ongoing experiences and as a component of the overarching Portfolio management and Monitoring, Evaluation and Learning (MEL) frameworks, design and iterate a supportive framework inclusive of:
 - (a) required skills and knowledge and strategies of acquiring them;
 - (b) supportive mindsets and desired organizational culture shifts;
 - (c) journey map of how the interested organizations can implement the respective framework, how to effectively communicate it to relevant stakeholders, resources required and key yardsticks of how they can measure progress on this path;
3. Adaptive learning and codification:
 - (a) Widely share and co-facilitate learning sessions between COs and key stakeholders.
 - (b) Support to networking and cross-portfolio learning around the competences and cultures required for advancing system change initiatives;
 - (c) Support ongoing codification of the process through joint blogs, briefs, webinars and other relevant knowledge products.
 - (d) Support in adaptation of the C&C framework into the RIC's Guidebook for Adopting Portfolio Approaches as a metamodel for use by other teams and organizations.

3) EXPECTED OUTPUTS AND DELIVERABLES

The expected outputs and deliverables will be agreed between the Consultant and the Regional Innovation Specialist and the Programme Specialist – Innovation and Knowledge, UNDP Bangkok Regional Hub, while working with the team members of the portfolio teams across the COs. 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)	5 days	10/10/2022
Deliverable 2: Current Landscape mapping	12 days	30/10/2022
Deliverable 3: Design the C&C framework with the most advanced portfolio (Pasig City)	14 days	30/11/2022
Deliverable 4: Test the framework with the other 2-3 portfolios and support content creation to capture the process in a report	14 days	01/03/2023
Deliverable 5: Finalize the framework and support its integration into the Guidebook	10 days	31/03/2023
Deliverable 6: Deliver adjacent knowledge and cross-portfolio learning products (at least 2 blogs, 2 briefs, 2 webinars, 1 presentation) and support portfolios' positioning, as required.	10 days	20/04/2023
	65 days	

Note: Deliverables are to be developed in coordination with the Portfolio Management Specialist and MEL consultants.

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

- **Duration:** 1 October 2022 – 30 April 2023 (maximum 65 working days)
- **Duty station:** The consultant will be home-based. No travel is required for this assignment
- **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) 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 by the Regional Innovation Specialist and/or the Programme Specialist - Innovation and Knowledge; 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)	10/10/2022	10%	Regional Innovation Specialist and/or Programme Specialist - Innovation and Knowledge (Asia-Pacific), UNDP BRH
Deliverable 2: Current Landscape mapping	30/10/2022	20%	
Deliverable 3: Design the C&C framework with the most advanced portfolio (Pasig City)	30/11/2022	20%	
Deliverable 4: Test the framework with the other 2-3 portfolios and support content creation to capture the process in a report	01/03/2023	20%	
Deliverable 5: Finalize the framework and support its integration into the Guidebook	31/03/2023	15%	
Deliverable 6: Deliver adjacent knowledge and cross-portfolio learning products (at least 2 blogs, 2 briefs, 2 webinars, 1 presentation) and support portfolios' positioning, as required.	20/04/2023	15%	

6) DEGREE OF EXPERTISE AND MINIMUM QUALIFICATIONS OF SUCCESSFUL CANDIDATE

- **Education:** Minimum 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.
- **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 year of demonstrated experience in applying advanced framework for impact assessment in system change and/or portfolio initiatives in a specific policy area (or social issue);
 - ✓ Demonstrated ability in running co-design sessions and/or facilitating cross-team learning (minimum 7 sessions facilitated - please list them down in your CV)
 - ✓ 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 clients to help surface unarticulated needs is an added value
 - ✓ 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
 - ✓ 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 Obtainable
Desk review for technical evaluation	
Minimum 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 in a specific policy area (or social issue)	25
Demonstrated ability in running co-design sessions and/or facilitating cross-team learning (minimum 7 sessions facilitated – please list them down in your CV)	10
Technical methodology	30
Total Desk Review for technical evaluation	100
Interview	100
GRAND TOTAL	200

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

Financial Evaluation (30%)

After interview, candidates who secure a minimum of 140 points out of 200 points in technical evaluation, will be considered for financial evaluation. 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.

Interested candidate 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: Candidate 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.

This consultancy is a home-based assignment, therefore, there is no envisaged travel cost to join duty station.

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

2. **P11 / Personal CV**, indicating all past experience from similar projects and specifying the relevant assignment period (from/to), as well as the contact details (email and telephone number) of the Candidate and at least three (3) professional references with contact details.
3. **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.**

Incomplete proposals may not be considered. The short-listed candidates may be contacted, and the successful candidate will be notified.