



Request for Proposals (RfP) IUCN Monitoring, Evaluation and Learning Analysis

IUCN Programme Performance, Monitoring and Evaluation Unit

Issue Date: 28 September 2020

Closing Date and Time: 23 October 2020

IUCN Contact : megan.cartin@iucn.org

PART 1 – INSTRUCTIONS TO PROPOSERS AND PROPOSAL CONDITIONS

1.1. About IUCN

IUCN is a membership Union uniquely composed of both government and civil society organisations. It provides public, private and non-governmental organisations with the knowledge and tools that enable human progress, economic development and nature conservation to take place together. Headquartered in Switzerland, IUCN Secretariat comprises around 900 staff in more than 50 countries.

Created in 1948, IUCN is now the world's largest and most diverse environmental network, harnessing the knowledge, resources and reach of close to 1,400 Member organisations and some 16,000 experts. It is a leading provider of conservation data, assessments and analysis. Its broad membership enables IUCN to fill the role of incubator and trusted repository of best practices, tools and international standards.

IUCN provides a neutral space in which diverse stakeholders including governments, NGOs, scientists, businesses, local communities, indigenous peoples organisations and others can work together to forge and implement solutions to environmental challenges and achieve sustainable development.

Working with many partners and supporters, IUCN implements a large and diverse portfolio of conservation projects worldwide that respond to a global quadrennial Programme. IUCN's next umbrella programme will be for the period 2021 to 2024. Combining the latest science with the traditional knowledge of local communities, IUCN's projects work to reverse habitat loss, restore ecosystems, fight climate change and improve people's well-being.

www.iucn.org

1.2. Summary of the Requirement

IUCN invites you to submit a Proposal for the **IUCN Monitoring, Evaluation and Learning Analysis**. The detailed Terms of Reference can be found in Part 2 of this RfP.

1.3. The procurement process

The following key dates apply to this RfP:

RfP Issue Date	28 September 2020
RfP Closing Date and Time	23 October 2020
Estimated Contract Award Date	23 November 2020

1.4. Conditions

IUCN is not bound in any way to enter into any contractual or other arrangement with any Proposer as a result of issuing this RfP. IUCN is under no obligation to accept the lowest priced Proposal or any Proposal. IUCN reserves the right to terminate the procurement process at any time prior to contract award. By participating in this RfP, Proposers accept the conditions set out in this RfP.

Proposers must sign the “Proposer’s Declaration” and include it in their Proposal.

1.5. Queries and questions during the RfP period

Proposers are to direct any queries and questions regarding the RfP to the following IUCN Contact megan.cartin@iucn.org. No other IUCN personnel are to be contacted in relation to this RfP.

Proposers may submit their queries no later than **16 October 2020**.

As far as possible, IUCN will issue the responses to any questions, suitably anonymised, to all Proposers. If you consider the content of your question confidential, you must state this at the time the question is posed.

1.6. Amendments to RfP documents

IUCN may amend the RfP documents by issuing notices to that effect to all Proposers and may extend the RfP closing date and time if deemed appropriate.

1.7. Proposal lodgement methods and requirements

Proposers must submit their Proposal to IUCN no later than **23 October 2020 (11:59pm CET)** by email to: megan.cartin@iucn.org. The subject heading of the email shall be [RfP – IUCN Monitoring, Evaluation and Learning Analysis - [Proposer Name]]. Electronic copies are to be submitted in PDF format. Proposers may submit multiple emails (suitably annotated – e.g. Email 1 of 3) if attached files are deemed too large to suit a single email transmission.

Proposals must be prepared in English and in the format stated in Part 3 of this RfP.

1.8. Late and Incomplete Proposals

Any Proposal received by IUCN later than the stipulated RfP closing date and time, and any Proposal that is incomplete, will not be considered. There will be no allowance made by IUCN for any delays in transmission of the Proposal from Proposer to IUCN.

1.9. Withdrawals and Changes to the Proposal

Proposals may be withdrawn or changed at any time prior to the RfP closing date and time by written notice to the IUCN contact. No changes or withdrawals will be accepted after the RfP closing date and time.

1.10. Validity of Proposals

Proposals submitted in response to this RfP are to remain valid for a period of 90 calendar days from the RfP closing date.

1.11. Evaluation of Proposals

The evaluation of Proposals shall be carried out exclusively with regards to the evaluation criteria and their relative weights specified in part 3 of this RfP.

PART 2 – THE REQUIREMENT

Background

IUCN seeks to build a stronger learning culture across the organization and to facilitate and consolidate Monitoring & Evaluation practices through user-friendly and cost-effective systems. Improving internal learning - about factors of success and effective approaches in conservation and sustainable development projects - entails having the means to capture, share and systematize lessons learnt across the organization, especially between regions and headquarters, and involving with communities and partners.

Oversight and Management of the Consultant

Oversight of the Consultant is provided by the Programme Performance, Monitoring and Evaluation Unit, which comprises three members of the IUCN Secretariat.

The Steering Committee's role is to provide oversight and approvals at each stage in the consultancy process, including approval of these Terms of Reference, the recruitment of the Consultant, the inception note and the draft and final report. The Consultant is expected to update regularly, via conference call and/or email, to ensure that the Steering Committee is well informed on the process.

Scope of the Analysis

The scope of the Analysis is to evaluate the overall performance of IUCN's Monitoring, Evaluation and Learning systems and capacities, and to provide lessons learnt that would generate actionable and realistic recommendations for strengthening Monitoring, Evaluation and Learning.

- Overall, the Analysis is intended to identify means to increase IUCN's programmatic effectiveness by mainstreaming Monitoring, Evaluation and Learning. Specifically, it seeks to:
- determine the status of implementation of IUCN's Monitoring & Evaluation Policy across the Secretariat;
- identify gaps and areas for further development, including capacity gaps;
- identify Monitoring & Evaluation best practices within the organisation, which may be elevated as corporate solutions and,
- propose new tools and improvements to existing ones
- provide elements for developing an Monitoring Evaluation and Learning Plan to be used by all programme and portfolio managers to undertake periodic monitoring, evaluation and learning activities during the 2021-2024 quadrennial.

Some of the gaps and areas for further development that IUCN anticipates include the use of standard indicators and the development of learning opportunities and mechanisms at the project portfolio, regional programme and/or thematic programme level.

Methodology

The methodology will include a combination of the following:

- The Consultant will review policies, external reviews and annual reports;
- The Consultant will conduct remote and/or face-to-face interviews with IUCN Secretariat staff at Headquarters and from the regions where IUCN operates;
- The Consultant will have access to all relevant documentation, in particular project documentation (proposals, plans, technical reports, monitoring data, donor reports, etc.), programme documentation (IUCN programmes, progress and assessment reports, monitoring reports, Technical documents, etc.), the evaluation database, relevant presentations, strategies and systems.

Qualifications of the Consultant



The profile of the Consultant will be senior professionals with specific expertise in the field of Monitoring and Evaluation for conservation and sustainable development at a programmatic level or global and regional levels.

Specific attributes required of the Consultant include:

- Documented experience undertaking corporate, programme and portfolio-level evaluations, reviews, assessments;
- Demonstrated knowledge of conservation and natural resource management issues;
- Considerable familiarity with international organizations;
- Experience in assessing or working with implementing agencies (e.g. of GEF, GCF) and/or grant making agencies;
- Fluency in English; in addition, good communication skills in French and Spanish would be an asset

Outputs

The consultancy will include the following outputs:

- An inception note, which interprets the TOR, and describes the approach and methodology of the Analysis, case selection, table of contents of the study report, etc., the detailed work plan consisting of no more than 10 pages;
- A draft and final Analysis report, with background information in annexes, providing an overview of the findings and recommendations in accordance with the scope of work. The main Analysis report shall not exceed 30 pages exclusive of annexes;

Timeline and Deliverables

The timeline and deliverables are proposed as follows, noting that adjustments may be necessary due to currently unforeseen circumstances. This timeline takes into account the end-of-year holiday season.

Process	Deliverable	Expected due date
Inception	Inception Note	Two weeks after contract award date
Draft report	Draft report	Three months after contract award date
Final report	Final report	Four months after contract award date

Approval of Deliverables

IUCN will have the final decision concerning successful delivery and quality of all deliverables.

PART 3 – THE EVALUATION MODEL

The evaluation process is as follows:

Technical criteria and financial proposal will be given a score from 1 to 5.

Points	Explanation
5	Excellent
4	Very good
3	Good
2	Fair
1	Inadequate

Technical criteria	weight
1. Quality of the proposal, including technical merit, approach to the objectives, approach to sampling, methods proposed	30
2. Quality of the consultant, including profile, qualifications and extent of qualifications in evaluating conservation interventions at monitoring and evaluation levels	30
3. Demonstrated consultant's experience in carrying out similar assignments	25
4. Quality of the writing sample, including degree to which the writing sample demonstrates strong evaluation practice	15
Total	100

Individual technical criteria scores will be weighted as indicated by the percentages in the table above. A total score will be awarded composed of Technical criteria score (60%) and Financial (40%).

Selection of the Consultant

The Steering Committee, comprised of three representatives from IUCN, will make the final selection of the successful Bidder based on the above criteria for selection. All parties will be notified one way or the other by **13 November 2020**.

PART 4 – INFORMATION TO BE PROVIDED BY PROPOSERS

By participating in this RfP, Proposers are indicating their acceptance to be bound by the conditions set out in this RfP.

This Part details all the information Proposers are required to provide to IUCN. Submitted information will be used in the evaluation of Proposals. Proposers are discouraged from sending additional information, such as sales brochures, that are not specifically requested.

Each of the following must be submitted as a separate document, and will be evaluated separately.

4.1. Technical information/Service Proposal

Proposers are required to submit the following details in their technical proposal:

- I. Project Methodology – describing in adequate detail how the Consultant intends to undertake the analysis delivery, justifying the approach described (maximum of 4 pages);
- II. CV;
- III. Evidence of similar analysis undertaken within the last 5 years;
- IV. References – contact details of three referees familiar with the proposer's experience relevant to the Analysis.

Short interviews with the top two candidates are expected to occur on or around first week of November.

4.2. Pricing information

This clause sets out the information necessary for Proposers to furnish rates and prices as consideration for delivering the Requirement under any resultant Contract.

Prices include all costs

Submitted rates and prices are deemed to include all costs, insurances, taxes, fees, expenses, liabilities, obligations, risk and other things necessary for the performance of the Requirement. Any charge not stated in the Proposal as being additional, will not be allowed as a charge against any transaction under any resultant Contract.

Applicable Goods and Services Taxes

Proposal rates and prices shall be exclusive of Value Added Tax.

Currency of proposed rates and prices

Unless otherwise indicated, all rates and prices submitted by Proposers shall be in Swiss Francs.

Rates and Prices

Proposers are required to submit a fixed and firm price for the total of the services. Within this total, please also provide subtotals for each subset of deliverables/activities.

PART 5 – DEFINITIONS

For the purposes of this Request for Proposal (RfP) the following definitions apply:

Contract	Means any contract or other legal commitment that results from this Request for Proposals.
Contractor	Means the entity that forms a Contract with IUCN for provision of the Requirement.
Instructions	Means the instructions and conditions set out in Part 1 of this Request for Proposals.
IUCN	Means IUCN, International Union for Conservation of Nature and Natural Resources.
IUCN Contact	Means the person IUCN has nominated to be used exclusively for contact regarding this Request for Proposals and the Contract.
Proposal	Means a written offer submitted in response to this Request for Proposals.
Proposer	Means an entity that submits, or is invited to submit, a Proposal in response to this Request for Proposals.
Requirement	Means the supply to be made by the Contractor to IUCN in accordance with Part 2 of the RfP.
RfP	Request for Proposals