Request for Proposals: Collection and Analysis of CGIAR system-wide Costs (Consultancy)

What we are seeking:
CGIAR is seeking a firm or team “Consultant” to assist Transition Advisory Group (TAG) 6 in the collection and analysis of system-wide costs across the CGIAR System by collecting data and performing a review of the financial statements, headcount, and detailed internal budgeting and costing information across a number of dimensions, including functional area, location (country, region), and Center.

Background
The CGIAR, as the world’s largest public research network on food systems, is undergoing a dynamic transformation of its partnerships, knowledge, assets, and global presence. We are integrating management, policies, and services; finding new, more impactful ways of doing research; sharing and investing more, pooled funding; and unifying our governance, including the creation of the One CGIAR Common Board.

As part of the transition process, Technical Advisory Group/s (TAG) were formed to advise on the different challenges and components of the reform. TAG 6 on Financial Management and Modalities was tasked to explore and develop financial models for funding the CGIAR, including the exploration of a more effective and universally applied cost recovery across the System.

Deliverables
The objective of this consultancy is to assist TAG 6 in the collection and analysis of system-wide costs across the CGIAR System by collecting data and performing a review of the financial statements, headcount, and detailed internal budgeting and costing information across a number of dimensions, including functional area, location (country, region), and Center. The intentions is for this analysis to cut across research project/programs and institutional operations to analyse the costs at their root function versus their classification within the financial system.
Methods and data sources

Phase 1: Initial Assessment and Plan Development (Duration – 2 weeks)
The consultant is expected to perform a desk analysis of existing and available financial information supported by focused deep-dive interviews of a cross section of CGIAR leadership to gain a better understanding of both how and why different centers allocate and classify costs differently.

In addition, the consultant will be expected to look at available information on relevant comparator organizations in the International Research and Development sector(s) to inform the Phase 2 data collection and analysis process.

Phase 2: Data Collection and Analysis (Duration – 8 weeks)
Drawing on the learnings from Phase 1 and in consultation with the TAG 6 Co-Stewards, the consultant will create a financial template to collect more detailed financial information from the various CGIAR System entities (Centers, Alliances and CGIAR System Organization). The consultant will liaise with the Finance staff at the System Entities to collect the relevant data.

In addition to consolidating and providing analysis of the data collected, the consultant will benchmark the collected data against the comparator organization in the International Research and Development sector(s) and identify any potential areas of priority arising from the benchmarking and analysis.

Initial areas of interest for analysis and consolidation of information purposes include, but are not limited to, the following:
- Clear data and information taxonomy to ensure common information is collected;
- Headcount, costs (regardless of charging methodology), and budgets by functional categories, and location (country or region, as appropriate)
- Identification of intra-System indirect costs associated with established hosting arrangements

Other sources of data and information for the reviews comprise the following:
1. CGIAR Cost Principles and Indirect Cost Guidelines: a guideline intended to guide the CGIAR Centers in calculating their indirect cost allocation and applying these costs appropriately across the Center.
2. Centers policies and procedures: these include available cost recovery methodologies, policies, and procedures implemented by the Centers.
3. CGIAR financial dashboards: the financial dashboard is an online portal that summarizes each Center financial results and financial indicators and is a supplement to the CGIAR consolidated financial report.
4. **Centers financial statements** and the collection of detailed internal costing information for the previous 3 years.

**Final Report (due on August 30 2020)**

The engagement’s end product will be a final report on of the data collected including:

- Database with Centers direct and indirect costs by function, location, and Center.
- Dashboards/Analysis comparing costs by function, location, and Center.
- Analysis of a comparison between the CGIAR Centers and other similar benchmarked organizations.

**Knowledge, skills, and abilities:**

- Credible and referenced track-record for the team or firm responding to the RFP;
- Significant experience in finance, accounting and costing methods;
- Proven experience with financial data collection and analysis;
- Senior leadership and change management experience in business or public administration, international development or affairs, or another relevant field;
- Proven excellent written and oral communication skills in English, including in multicultural settings;
- Experience working with the non-profit sector and familiarity with the CGIAR preferred, and
- Open to individuals (teams) or corporate clients.

**Required format of response to RFP:**

Your response should be prepared in accordance with the following table:

<table>
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<tr>
<th>Contents</th>
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<tbody>
<tr>
<td><strong>Executive Summary</strong>, specifically setting out the merits of your proposal</td>
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<tr>
<td>1. Your understanding of our requirements</td>
</tr>
<tr>
<td>(informed by completing comparable assignments)</td>
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<tr>
<td>2. Your suggested Approach</td>
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<tr>
<td>a. Methodology for conducting the engagement including delivery on the engagement’s objectives</td>
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<tr>
<td>b. Detailed Proposed Work Plan</td>
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<tr>
<td>c. How you will maximize the value added and minimize effort/fees</td>
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<tr>
<td>d. Proposed milestone timetable</td>
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<tr>
<td>3. Project team</td>
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<tr>
<td>a. Overview of your proposed team (organogram and primary point of contact, if applicable)</td>
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b. Overview of qualifications and relevant experience of proposed team (indicating whether any are contractors/sub-contractors) (detailed resumés may be included as Appendices)

c. Knowledge and experience of CGIAR/its Centers and similar organizations

4. Other Information

a. A statement disclosing whether the proposed team members have any real, apparent or perceived conflict of interest and how it will be addressed

b. A statement of the combined total fees earned from CGIAR/its Centers for the year ended 31 December 2019

5. Appendices (any other/supplementary information you wish to submit) but will not form basis for evaluation.

6. Proposed fee (to be sent as a separate Annex)

a. Quote in the form of a fixed fee (i.e. US$ amount) with a breakdown by activity; setting out the professional fees (allocated hours, daily rates) and expenses separately.

Schedule and Dates

The following schedule includes key milestones and their associated completion dates and is provided primarily for planning purposes. CGIAR System Organization may modify the project timeline at its discretion.

<table>
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<tr>
<th>Activity</th>
<th>Target dates</th>
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<tbody>
<tr>
<td>Publish RFP Notice</td>
<td>May 05, 2020</td>
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<tr>
<td>End of inquiry period for RFP clarification (bidder)</td>
<td>May 11, 2020</td>
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<tr>
<td>Response to inquiries shared and FAQs published on CGIAR website</td>
<td>May 12, 2020</td>
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<tr>
<td>RFP submission due (bidder)</td>
<td>May 20, 2020</td>
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<tr>
<td>Notification to the successful bidder</td>
<td>May 27, 2020</td>
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<tr>
<td>Contract execution with CGIAR System Organization</td>
<td>May 30, 2020</td>
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<tr>
<td>Final consolidated report submitted to CGIAR TAG 6</td>
<td>August 30, 2020</td>
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Evaluation Criteria:

All proposals will be evaluated on a value-for-money, 2-step basis with the technical proposals and the financial proposals each being evaluated separately in the first round and then combined to determine the best value for the price. Bidders whose proposals have been short-listed may be contacted with questions for clarification.

The Evaluation Criteria to select the service provider will be as follows:
i) Technical Proposal: 70%
   - Approach or methodology.
   - Composition of team allocated for the services (including qualifications & experience).
   - List of three clients for which a similar set of services are currently being provided.
     Please include the contact details for a reference check.

ii) Financial Proposal: 30%

How to submit a proposal:
Please submit a narrative proposal and a budget proposal as two separate documents to smo-procurement@cgiar.org. Both documents can be attached to the same email.

The narrative proposal will consist of no more than ten pages using Microsoft Word or a similar format, font size 11pt., margins no smaller than one-inch. Proposals must include the team composition and experience and clearly breakdown each team member's estimated contribution to the proposal.

The budget proposal will be presented using Microsoft Excel or a similar format and consist of, at a minimum, the following line items: consultant time, resources, travel. The budget will be presented in US dollars.

All proposals must be received no later than 24:00 Paris time, May 20, 2020. Only electronically submitted proposals will be considered. Late proposals will not be considered.

Who we are:
CGIAR is a global research partnership for a food-secure future. CGIAR science is dedicated to reducing poverty, enhancing food and nutrition security, and improving natural resources and ecosystem services. Its research is carried out by 15 CGIAR Centers in close collaboration with hundreds of partners, including national and regional research institutes, civil society organizations, academia, development organizations, and the private sector. These 15 Centers have close to 10,000 staff based in over 50 countries.

The CGIAR System Organization, which is an international organization headquartered in Montpellier, France, provides governance to the CGIAR System in collaboration with the System Council and has about 40 staff. The Organization is committed to cultivating a work environment that reflects teamwork, gender equality, and respect for diversity. We endeavor to foster a multi-cultural environment that is free of any form of harassment and discrimination; and that embraces and values individuals regardless of age, ethnicity, race, gender, national or social origin, marital status, or any other form of personal identity.

Please find more information about CGIAR at www.cgiar.org