



Contract Management Training

REQUEST FOR PROPOSAL

CGIAR System Organization

Contents

1.	Introduction and Background:	2
2.	Scope of Work	2
3.	Deliverables	4
4.	Qualifications and Experience.....	5
5.	Project timeline	6
6.	Performance Measurement and Review:.....	6
7.	Legal Considerations	9
8.	Required Proposal Content:.....	11
9.	Proposal Evaluation	13
10.	Bid Schedule and Dates:.....	16
11.	Communication during RFP period	17
12.	How to submit a proposal:	17
	Annexes.....	18

1. Introduction and Background:

CGIAR is a global research partnership whose mission is to create a world with sustainable and resilient food, land, and water systems that deliver diverse, healthy, safe, sufficient, and affordable diets and ensure improved livelihoods and greater social equality within planetary and regional environmental boundaries. Our organization is composed of 13 research Centers across the globe and our research is carried out in close collaboration with hundreds of partners, including national and regional research institutes, civil society organizations, academia, development organizations, and the private sector.

More information about CGIAR is available at www.cgiar.org and in Appendix 2.

We require a specialized Firm/Consultant or organization to develop and deliver a comprehensive training program for our procurement leads across all 13 Centers. This training will focus on best business practices in contract management from a procurement perspective, tailored to the diverse and multicultural settings of the CGIAR Centers, as well as to differing levels of procurement maturity.

Objectives:

- To understand the importance of contract management in delivering value for money, including the risks and pitfalls of weak contract management.
- To provide comprehensive knowledge and understanding of procurement contract management principles and practices;
- To develop and enhance practical skills for managing procurement contracts effectively;
- To ensure compliance with legal and regulatory requirements;
- To improve contract performance and supplier relationship management;
- To mitigate risks associated with procurement contracts.

2. Scope of Work

Training Module Development/Learning Outcomes:

- Assessment and Design: Conduct an initial assessment to identify specific training needs across CGIAR Centers through an interview with a designated CGIAR Procurement Task Team. Develop a training module that covers essential areas of contract management, including:
 - Types of contracts and how to utilize them effectively;
 - Management of a contract portfolio;

- Use and selection (negotiation) of contract templates;
 - Administration of a contract clause library;
 - Operationalization of contracts, including Techniques for managing complex contracts, dispute resolution, and performance monitoring
 - Management of contracts and compliance;
 - Strategic sourcing and renegotiation before contract expiration and termination;
- Digital Solutions: Overview of benefits and challenges of implementing digital contract management systems. Key activities necessary in preparation for Digital solutions (e.g. assessment, stakeholder engagement, data management, requirements gathering)
- Review Process: Collaborate closely with CGIAR leadership to review and refine the draft training materials, ensuring they meet CGIAR's requirements and are well-suited to the diverse, multicultural audience.

Training Delivery:

- Virtual Sessions Implementation: Facilitate two sets of virtual training, scheduled over two days and tailored for participants from the Western and Eastern Hemispheres, respectively, to accommodate different time zones. Each session will last for three hours. (Suppliers are welcome to suggest sessions with a different combination of days and length that best accommodates the proposed curriculum).
- Training Audience: There will be 2-3 procurement participants per Center, for a total of 25-35 participants divided into the 2 sets of sessions.
- Engagement and Practical Application: The Firm/Consultant will utilize interactive teaching methods, including case studies and practical exercises, to ensure engagement and enhance the practical application of taught concepts.

Documentation and Knowledge Sharing:

- Training Materials and Videos: Finalize and share the training materials, including presentations, handouts, and case studies. Record sessions, edit for clarity and brevity, and prepare them for upload to CGIAR's Knowledge Management system.
- Quick Reference Guides: Develop and distribute quick reference guides or cheat sheets summarizing key points from the training to aid in daily practical application by procurement leads.

Evaluation and Reporting:

- Training Effectiveness Survey: Design and administer a post-training survey in collaboration with CGIAR leadership to evaluate the effectiveness and impact of the

training. This will include measuring participant satisfaction and the applicability of the training in their daily work.

- **Test Results and Analysis:** Conduct assessments during the training sessions to gauge learning outcomes. Compile individual and group performance into a confidential report to help CGIAR assess knowledge gains and identify areas for future improvement.
- **Final Report Submission:** Submit a comprehensive final report that includes detailed survey results, analysis of test outcomes, and a review of the training sessions. Provide recommendations for future training initiatives based on collected data and participants' feedback.

Alternative 2 Proposals

While the RFP describes a specific scope of work and methodology, we recognize that bidders may bring diverse backgrounds, strengths, and specializations to this project. Therefore, we invite bidders to propose creative and innovative approaches that they believe will add value and achieve the expected outcomes.

Therefore, Bidders are encouraged but not obligated to include a separate Alternative 2 in their proposal outlining any additional value or alternative approaches they believe would result in at least the same learning outcomes described in the Scope of Work. If bidders choose to present an additional alternative approach, it should be clearly presented as a distinct Alternative 2 in the proposal, in addition to the Alternative 1 proposal addressing the Scope of Work herein described. Alternative 2 must also include the Evaluation and Report. Added value options could include, but are not limited to:

Innovative Training Techniques: Proposals that incorporate cutting-edge training methodologies or technologies.

Customization Options: Tailoring the training content to address specific needs or challenges faced by our procurement professionals.

Additional Value-Added Services: Offering supplementary services such as certification programs, access to exclusive training resources, or ongoing support.

3. Deliverables

In alignment with the Scope of Work the following deliverables are expected for acceptance:

- **Comprehensive Training Module on Contract Management:** The Firm/Consultant will develop a detailed and interactive training module focused on the best practices in contract management from a procurement perspective. The module should be suitable for a diverse,

multicultural audience.

- **Virtual Training Sessions:** The Firm/Consultant will conduct two tailored virtual training sessions. Each session is designed to accommodate participants from different time zones—specifically targeting the Western and Eastern Hemispheres.
- **Recorded Training Session:** The Firm/Consultant will submit a video training session professionally edited for clarity and brevity. The final videos will become the property of CGIAR and will be stored on CGIAR’s Knowledge Management platform for future training and reference (Ensure these materials are suitable for asynchronous learning and future reference).
- **Training Aids:** The Firm/Consultant will create practical training aids, such as quick reference cards or guides, highlighting key areas of contract management. These aids will assist participants in implementing learned concepts within their respective roles.
- **Training Review Survey Development and Administration:** The Firm/Consultant will develop a comprehensive survey to capture participant satisfaction and the effectiveness of the training. The survey will be reviewed and accepted by CGIAR procurement leadership to ensure alignment with training objectives. The Firm/Consultant will administer the survey at the end of each training session and compile the results for CGIAR review.
- **Individual Test Results Report:** A confidential report will be provided, documenting the individual test results of participants. These results will not be disclosed publicly but will be used internally to gauge the effectiveness of the training and understand areas needing improvement.
- **Final Report:** Compile a comprehensive final report that includes detailed survey results (including raw data), an analysis of test outcomes, and a review of the training sessions. The report should provide insights into the training’s effectiveness, areas for improvement, and recommendations for future training initiatives based on collected data and participant feedback.

4. Qualifications and Experience

Extensive Experience in Procurement and Contract Management Training: The Firm/Consultant must demonstrate a strong track record of developing and conducting training specifically focused on procurement and contract management. This includes the ability to effectively customize and enhance existing training modules to meet the specific needs of CGIAR.

- **Expertise and Experience:** Demonstrated knowledge and expertise in contract management. Relevant experience in providing training to procurement professionals. Familiarity with industry best practices and emerging trends in contract management. The contractor should submit relevant examples of experience through attachments or links.

- **Cultural and Linguistic Adaptability:** The Firm/Consultant should have experience delivering training to professionals from various cultural backgrounds and proficiency levels in English. They must demonstrate sensitivity and adaptability to multicultural and multilingual settings.
- **Expertise in Virtual Training Delivery:** The Firm/Consultant must possess robust skills in conducting virtual training sessions. This includes proficiency in using online training platforms, engaging remote participants, and managing virtual classroom dynamics effectively.
- **Language Proficiency:** Professional fluency in English is required. Additional language capabilities are highly desirable to accommodate the diverse linguistic backgrounds of the training participants.

5. Project timeline

The timeline below is presented as guidance, and it will be finalized as part of the final negotiations with the finalist.

Action/Deliverable	Date
Development of the training module	[Start Date] to [Mid-point review date]
Co-design session with CGIAR leadership:	[Specific date]
First training delivery	[Date for West Hemisphere]
Second training delivery	[Date for East Hemisphere]
Submission of final report and training materials	[End date]

6. Performance Measurement and Review:

Key Performance Indicators (KPIs): The performance of the Firm/Consultant will be measured based on the following key performance indicators (KPIs), with a structured approach to both qualitative and quantitative assessments:

6.1 Quality of Work:

- The Firm/Consultant's deliverables will be assessed for accuracy, completeness, and relevance to the needs of CGIAR procurement leads.
- The quality of training materials, including comprehensiveness of content and usability of provided aids such as quick card guides.
- Measurable learning outcomes through participant testing.

6.2 Timeliness:

The Firm/Consultant will be evaluated on their ability to meet the predefined and agreed-upon deadlines.

6.3 Trainee Satisfaction:

- At the end of each training session, participants will complete a detailed survey designed to measure their satisfaction with various aspects of the training. The survey will cover:
 - The clarity and relevance of the information and resources presented.
 - The effectiveness of the training delivery, especially considering the multicultural and multilingual audience.
 - The applicability of the skills and knowledge gained in their respective roles.
 - Overall satisfaction with the training experience.
- The Firm/Consultant will develop the initial draft of the satisfaction survey, incorporating key areas relevant to the training objectives.
- CGIAR procurement leadership will review and provide input on the survey to ensure it captures all necessary feedback areas relevant to the training's effectiveness and applicability.
- The final survey will be conducted online at the end of each training session to ensure immediate and relevant feedback from all participants.

6.4 Adherence to Budget:

The Firm/Consultant's ability to manage the allocated budget effectively.

Performance Evaluation and Review

Performance evaluation is a fundamental aspect of ensuring this project's success and timely completion. The outlined Key Performance Indicators (KPIs) will serve as the backbone for this continuous evaluation process, ensuring the Firm/Consultant's alignment with the project's goals and expectations. The comprehensive and structured performance evaluation process, built on stakeholder feedback, project progress reports, and reviews, will ensure the constant alignment of the Firm/Consultant's performance with the project's objectives.

Evaluation Methodology:

Stakeholder Feedback: The Firm/Consultant's performance will be subject to evaluation by pertinent project stakeholders. Their insights and perspectives will offer a comprehensive view of the Firm/Consultant's adherence to the defined KPIs, contributing to a well-rounded assessment.

Project Progress Reports: Regular project progress reports will be an essential tool for assessing the KPIs. These reports should detail the Firm/Consultant's accomplishments, challenges, and adherence to the project schedule and budget.

Review Process:

The performance review will be conducted by the CGIAR unit sponsor, and the contact/responsible person mentioned in the agreement.

Reviews will occur at the following stages:

- Midway through the training development phase to ensure alignment with CGIAR's expectations.
- After the first training session to make necessary adjustments before the second session.
- At the end of the project after all deliverables have been submitted and evaluated.

All feedback and assessments provided during the review meetings will be formally documented. This documentation will serve as a record for performance assessment and will be referenced in future evaluations and reviews.

The Firm/Consultant will have the opportunity to respond to the feedback, offering insights into their performance, challenges faced, and the strategies employed for issue resolution and project advancement. A collaborative approach will be adopted to identify areas of improvement and the necessary steps to enhance performance in subsequent processes/phases.

7. Legal Considerations

7.1. Confidentiality

To ensure information security throughout this RFP process, all information disclosed by CGIAR ("Discloser") and all information submitted by the Firm/Consultant in response (including technical details, pricing information, and business plans) will be considered confidential. This information can only be used for proposal preparation and cannot be disclosed to any external party without our prior written consent. Exceptions include the Firm employees or advisors needing the information for proposal development, provided they are bound by confidentiality obligations at least as strict as those outlined here. The Firm/Consultant must ensure any subcontractors, or third parties involved in the engagement are bound by similar confidentiality obligations. The Firm/Consultant is responsible for protecting this information with the same care given to their own confidential data and remains liable for any breaches by subcontractors or third parties. CGIAR acknowledges the information's value and the potential harm from a breach, so the Firm/Consultant's confidentiality obligations extend beyond the proposal deadline and remain in effect for ten years from the RFP date.

By submitting a proposal, the Firm/Consultant commits to the following:

- a) All information obtained during the engagement with CGIAR will be stored only on CGIAR servers/systems.
- b) None of the information obtained during the engagement with CGIAR shall be shared with any other party for any reason.
- c) The provided access by CGIAR shall only be used for this project and to communicate with CGIAR and only for this project.
- d) Access to Confidential Information will be limited to those of its employees or contractors who have a legitimate need to know such information for the project and who have agreed in writing to be bound by the terms of this NDA.
- e) All reasonable precautions will be taken to prevent the unauthorized disclosure or use of Confidential Information, including but not limited to implementing and maintaining adequate security measures.
- f) Access to CGIAR systems shall only be made from trusted machines with current protection standards.
- g) Access to CGIAR systems shall not be made from any sanctioned country by US laws applicable to MS products.

7.2. Contracting

The Firm/Consultant should accept the CGIAR System Organization standard terms and conditions of contract in Appendix 1.

If the Firm/Consultant requires amendment of specific clauses, the Firm/Consultant must submit those suggested amendments to the contract clauses for our review and consideration. **Please submit it in Word format as a separate document, along with the Firm/Consultant's confirmation of intent to submit a proposal.**

CGIAR reserves the right to request additional information or clarification regarding the suggested edits to the contract clauses during the evaluation process. Submitting suggested clauses does not guarantee that the Firm/Consultant will be awarded the contract. Final contract negotiations will be conducted with the selected Firm/Consultant based on the evaluation results.

7.3. Conflicts of Interest

To ensure a fair and objective selection process, the Firm/Consultant guarantees they have no conflicts of interest (financial or otherwise) that could influence their work on this project. They must disclose any potential conflicts immediately, with details and proposed mitigation strategies (like staff recusal or information firewalls). CGIAR has the right to reject proposals with unmanageable conflicts and terminate the agreement for breaches. The Firm/Consultant is also responsible for ongoing monitoring and disclosure of new conflicts. Any confidential information they share about potential conflicts will be kept confidential by us, except for evaluation or breach-related actions.

7.4. Payment Terms

Standard payment terms will be Net 30 days from the date of invoice receipt.

To ensure a clear and accountable payment structure, CGIAR will compensate the consultant based on the achievement of specific milestones corresponding to the significant phases of the contract management training development and delivery. Payments will be made post-delivery of each milestone, ensuring the consultant meets the quality and timeline expectations set forth in the scope of work. CGIAR does not offer advance payments but ensures timely disbursement upon milestone completions.

Payment for Development of Training Module and Materials:

Amount: 30% of total contract value.

Trigger: Successful submission and approval of the comprehensive training module, including all handouts, presentations, and case studies, ready for the first session.

Payment for First Training Delivery:

Amount: 25% of total contract value.

Trigger: Successful delivery of the first set of virtual training sessions to the Western Hemisphere, including the execution of interactive and practical learning components.

Payment for Second Training Delivery:

Amount: 25% of total contract value.

Trigger: Successful delivery of the second set of virtual training sessions to the Eastern Hemisphere, ensuring all training objectives are met and initial participant feedback is positive.

Payment for Final Deliverables and Reporting:

Amount: 20% of total contract value.

Trigger: Submission and acceptance of the final comprehensive report, which includes detailed survey results, analysis of test outcomes, the effectiveness of the training, and the final edited training videos uploaded to CGIAR's Knowledge Management system.

Conditions for Payment:

Each payment will be processed only upon the satisfactory completion and approval of the respective deliverables by the CGIAR Procurement Director or designated CGIAR review team.

The consultant is required to submit a detailed invoice citing the specific milestone achieved.

All deliverables must adhere to the quality standards specified in the ToR and must be submitted within the timelines agreed upon in the contract.

8. Required Proposal Content:

This RFP document is not intended to limit the Firm/Consultant's submission content but rather to provide a framework for CGIAR to evaluate each proposal and determine which submission most closely addresses the needs. Firms/Consultants are encouraged to provide any additional information or innovative approaches not specifically outlined in this RFP. Firms/Consultants will provide any reasonable additional information upon request by the CGIAR.

IMPORTANT: Firms/Consultants presenting an Alternative 2 proposal must submit a separate technical (project methodology and timelines) and commercial proposal. Alternative 2 will be evaluated independently as a separate proposal.

a) Technical Proposal

[Firm/Consultant profile]

- Name: Clearly state the name of the Firm/Consultant (lead Firm/Consultant for consortium).
- Primary Contact: Provide the name and title of the contact person.
- Contact Information: Include the full mailing address, e-mail address, and telephone number for direct communication.
- Overview: A brief summary of the Firm/Consultant's business operations / CVs for individuals

[Experience and Team Composition]

- Extensive Experience in Procurement and Contract Management Training: The consultant must demonstrate a strong track record of developing and conducting training specifically focused on procurement and contract management. This includes the ability to effectively customize and enhance existing training modules to meet the specific needs of CGIAR:
- Expertise and Experience: Demonstrated knowledge and expertise in contract management.
- Relevant experience in providing training to procurement professionals.
- Familiarity with industry best practices and emerging trends in contract management. The contractor should submit relevant examples of past experience through attachments or links.
- Cultural and Linguistic Adaptability: The consultant should have experience delivering training to professionals from various cultural backgrounds and proficiency levels in English. They must demonstrate sensitivity and adaptability to multicultural and multilingual settings.
- Expertise in Virtual Training Delivery: The consultant must possess robust skills in conducting virtual training sessions. This includes proficiency in using online training platforms, engaging remote participants, and managing virtual classroom dynamics effectively.
- Language Proficiency: Professional fluency in English is required. Additional language capabilities are highly desirable to accommodate the diverse linguistic backgrounds of the training participants.

[Project Methodology and Timelines]

- Description of the proposed process to fulfill the Scope of Work, Deliverables, and expectations outlined in the RFP.
- Outline the key milestones, responsibilities, level of effort, and proposed timelines

b) Financial Proposal

Proposed fees should be presented in US\$ excluding taxes. The Proposal should indicate the costs while detailing the deliverables /milestones.

Provide a breakdown of the deliverables/milestones in US\$ (excluding taxes) including any budgetary assumptions made, contingency and mitigation actions.

Identification of any project element to be subcontracted (if any), showing number of subcontractor hours and their hourly rates.

The below is an example:

Resource/Role	Day rate (US\$)	Total Days/Input	Sub-total fees (US\$)
Team Leader			
Expert 1			
Expert 2			
Total			

9. Proposal Evaluation

The purpose of this section is to outline the evaluation criteria and process that will be used to assess and select the most qualified Firm/Consultant.

a) Evaluation Criteria:

In the selection of the ideal Firm/Consultant for this project, a comprehensive evaluation will be conducted. As a global organization, CGIAR is agnostic to the location of the Firms/Consultants that participate in delivering the scope of work outlined in this RFP; however, flexibility in consideration of CGIAR's global stakeholders and constituents is necessary, and any challenges should be addressed in the proposal.

Proposal Alignment:

Expectation: The Firm/Consultant's proposal should be clear, concise, and directly aligned with our specific requirements, demonstrating a thorough understanding and thoughtful approach to the CGIAR's objectives and outlined deliverables.

Experience:

Expectation: The submission of relevant case studies that highlight the Firm/Consultant's experience and success in similar projects. The showcased experience should resonate significantly with the needs and requirements of CGIAR.

Reputation and References:

Expectation: Provision of contact information for at least two previous clients or references who can attest to the Firm/Consultant's competence, professionalism, and reliability in delivering high-quality service.

Project Management and Communication:

Expectation: Evidence of the Firm/Consultant's proven strategies and tools for effective project management and communication, ensuring smooth collaboration, timely updates, and the efficient resolution of any issues or concerns.

Contractual and Legal Compliance:

Expectation: Assurance that the Firm/Consultant comprehensively complies with all legal requirements and offers a transparent, fair contract that safeguards our interests.

Data Security and Privacy:

Expectation: confirmation that the Firm/Consultant adheres to industry best practices for data security and privacy, ensuring the utmost protection of sensitive information.

Cost and Budget:

Expectation: A clear, detailed breakdown of the Firm/Consultant's proposed fees including details of any assumptions.

Timeline and Deliverables:

Project Timeline:

Expectation: Presentation of a realistic yet flexible project timeline, ensuring the timely completion of deliverables without compromising quality.

Deliverables:

Expectation: Explicit definition of the scope of work and anticipated deliverables, ensuring they robustly align with CGIAR's requirements.

CGIAR reserves the right to progress with all, one, or multiple activities of a bidder's response based on its performance against the evaluation criteria.

b) Evaluation Process

The evaluation will be conducted based on the criteria outlined in this RFP. The RFP timeline may be modified if needed to benefit the RFP results while keeping interested parties well informed.

Evaluation Panel: An evaluation panel will be established to review and evaluate all proposals received. The panel will consist of representatives from CGIAR's relevant departments. The panel members will be selected based on their expertise and experience relevant to the RFP.

Evaluation Criteria: The panel will evaluate each Firm/Consultant's technical capabilities, including team composition, proposed approach and methodology, references, and cost.

Evaluation Process: The evaluation process will consist of the following steps:

Proposal review: The panel will review all qualified proposals, assessing them against the evaluation criteria outlined in this RFP.

Evaluation and Scoring: The evaluation panel will evaluate each shortlisted Firm/Consultant's proposal and presentation based on evaluation criteria. The scoring system listed below will be used to ensure consistency and objectivity in the evaluation process.

Firm/Consultant Selection: After completing the evaluation scoring, the panel will recommend the selection of the Firm/Consultant that best meets the RFP requirements and evaluation criteria.

Confidentiality and Conflict of Interest: All evaluation panel members will be required to sign a Conflict-of-Interest statement and treat all information submitted by participating Firm/Consultants as confidential and used solely for the purpose of Firm/Consultant selection.

c) Weighting System

Technical Criteria	Weight (100)
Technical Approach and Methodology: Evaluation of the proposer's understanding of CGIAR's needs and their detailed approach and methodology for developing and delivering the training. This includes the innovativeness and practical applicability of the proposed training modules.	(30%)
Experience and Qualifications: Assessment of the consultant's experience in contracts management training, particularly within similar sectors or organizations. Qualifications of the team members designated for this project will also be considered. Including references and Track Record Positive client references and testimonials from previous training engagements.	(25%)

Track record of successful training initiatives and client satisfaction. Evidence of long-term impact and improvement in contract management practices for previous clients. The contractor should submit relevant examples of experience through attachments or links.	
Past Performance Review of references and past performance on similar projects. This includes feedback from previous clients on the effectiveness of training delivered and the consultant's ability to meet deadlines and respond to client needs.	(20%)
Cost Proposal: Evaluation of the overall financial feasibility of the proposal, ensuring that the cost is reasonable and provides value for money within the scope of work defined.	(25%)

10. Bid 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.

Dates	Milestones
17 June 2024	Issuance of Request for Proposals
20-24 June 2024	Confirm of intent to submit a proposal
20 June 2024	Submit RFP questions or requests for clarification by this date
24 June 2024	Responses to questions provided by CGIAR
26 June 2024	Bidders Conference
08 July 2024	Deadline for submission of proposal.
15 July 2024	Notification of Award to the successful Firm/Consultant
19 July 2024	Contract signed
22 July 2024	Contract start date – Kickoff induction program

11. Communication during RFP period

CGIAR intends to run a fair bidding process where all respondents are given equal opportunity to put forward their best proposal. As such, any material questions asked by bidders will be collated, answered, and shared with all bidders before the RFP closes.

Submit your questions through the email smo-bidding@cgiar.org

12. How to submit a proposal:

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

All proposals must be received by **08 Jul 2024, at 11:59 PM** Paris time. Only electronically submitted proposals will be considered.

Annexes

Annex 1: CGIAR standard terms and conditions of contract

Annex 2: CGIAR Model