



INVITATION TO TENDER

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INVITATION TO TENDER

ITT FY23 0178 Humanitarian Learning Needs Assessment

1. Background Information on Plan International

Plan International is an independent development and humanitarian organisation that advances children's rights and equality for girls.

We believe in the power and potential of every child, but this is often suppressed by poverty, violence, exclusion and discrimination, and its girls who are most affected. Working together with children, young people, our supporters and partners, we strive for a just world, tackling the root causes of the challenges facing girls and all vulnerable children.

We support children's rights from birth until they reach adulthood, and we enable children to prepare for – and respond to – crises and adversity. We drive changes in practice and policy at local, national and global levels using our reach, experience and knowledge.

We have been building powerful partnerships for children for over 85 years and are now active in more than 75 countries.

Read more about Plan International's Global Strategy: **Girls Standing Strong** at <https://plan-international.org/strategy>

2. Summary of the Requirement

Plan International are inviting interested parties to submit proposals for the provision of consultancy services to conduct a learning needs assessment of the organisation against the priority of scaling up humanitarian action and to support the organisation to implement the recommended actions from the learning assessment. Successful Bidder(s) will be expected to enter into a formal contract with our organization. Plan International reserves the right not to award a contract as a result of this Invitation to Tender, or to award to multiple successful Bidders.

3. ITT Overview and Instructions

3.1 Overview

Plan International is evolving. Over the next five years, from 2022-27, we will build on the many successes of our previous strategy 100 Million Reasons as we continue in our Purpose to strive for a just world that advances children's rights and equality for girls. Our objectives for the next five years are Increased Impact, Strengthened Legitimacy, and Improved Sustainability. Every single person in Plan International, regardless of job or speciality, will work to achieve these objectives and increase our impact. Each objective has priorities that define key areas of our work. Within the Increased Impact Objective our work will reach and benefit young women and girls, especially those living in fragile

contexts, fighting injustice, or facing crisis. As we strive for lasting impact we will focus on girls' rights and scale up humanitarian impact.

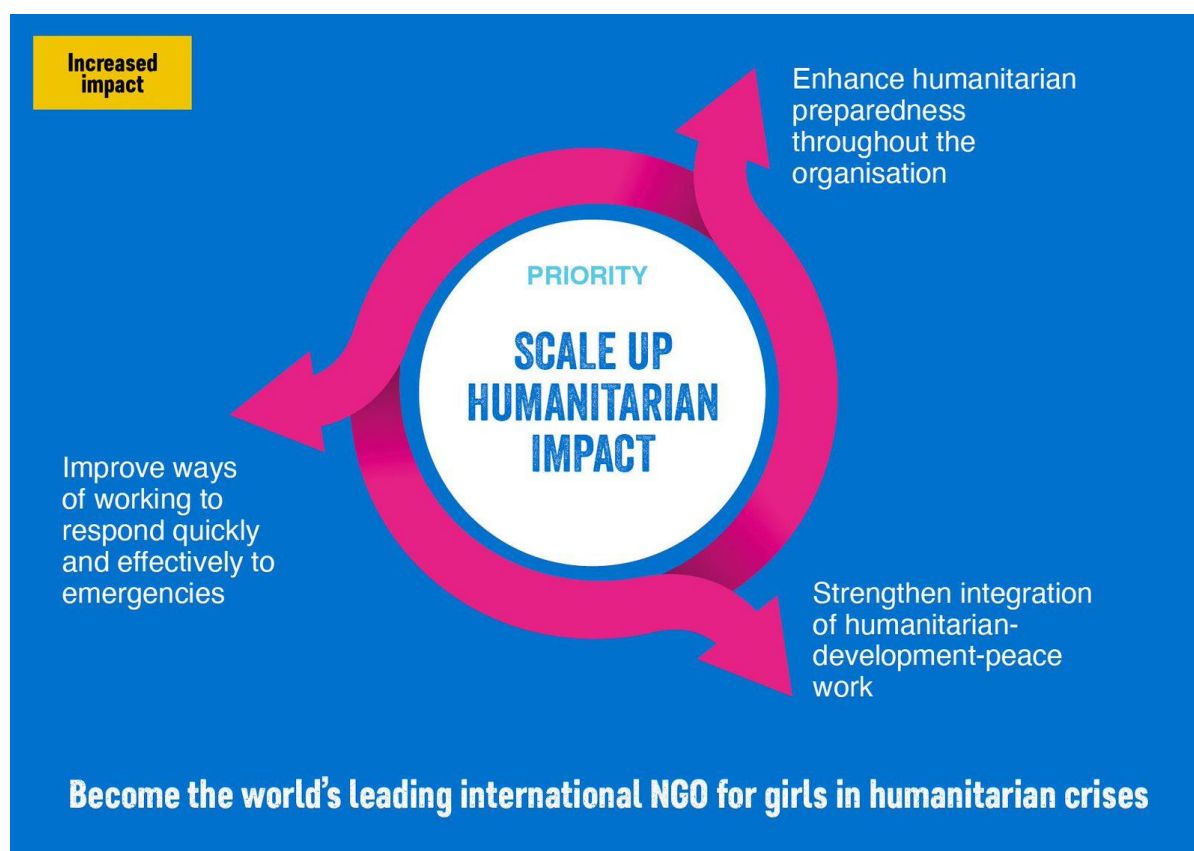
With the shift in organisation focus and prioritisation of scaling up our humanitarian impact it is important we are providing our staff with the support and tools they need to help the organisation achieve its ambition. To do this we need to assess where we currently are as an organisation with regards to our humanitarian impact and compare this to our desired position to help us identify the learning needs of our staff. It is important to recognize and appreciate strengths in terms of skills and capabilities that individuals, teams and the organization have to reach the objectives, as well as what steps they have to do to reach their objectives. A Learning and Development Plan is tool that could provide a road map for staff and those in leadership positions in the organization to support not only their careers and personal development but also to achieve the results for children based on Global Strategy, Regional Business Plan and Country/National Office Strategy.

Our Priority: Scale up humanitarian impact

We will become the leading organisation for girls facing crisis or disaster.

We will enhance our systems, processes, and ways of working so we can respond quickly and effectively to any emergency.

We will adopt a humanitarian-development-peace nexus approach that will allow us to work well together, and better coordinate our efforts in protracted crises and fragile contexts.



For further information please refer to Annex A.

Purpose

The purpose of the consultancy is twofold, 1. To conduct a learning needs assessment of the organisation against the priority of scaling up humanitarian action, and 2. To support the organisation to implement the recommendation that have arisen from the learning needs assessment. Learning is a key part of the [Core Humanitarian Standard on Quality and Accountability \(CHS\)](#). Plan International adheres to the [CHS](#) and is a global family member of the CHS Alliance. As the commits to CHS do, Plan International places communities and people affected by crisis at the centre of humanitarian action. As a core standard, the CHS describes the essential elements of principled, accountable, and high-quality humanitarian aid. In Commitment 7 the CHS calls out organisational learning based on prior experience, building learning into processes and procedures based on feedback and the sharing of learning across the organisation and with communities and affected people. From recent audits and learning reviews, Plan International has scored poorly in this area and is a specific commitment where we need additional focus and organisational commitment. This is also true of the sector more broadly. [The Humanitarian Accountability Report \(HAR\)](#) for 2022 shows the trend of other organisations applying the standard, and Commitment 7 is the second lowest scorer (behind Commitment 5 on welcoming and addressing complaints).

This tender is divided into two lots, you are invited to bid for either one or both lots. It is important to note that Lot 2 deliverables are contingent upon securing further funding. It is requested that bidders include Lot 2 in their workplan and budget proposal for the purposes of analysis if they have to capacity to provide this support. Lot 2 deliverables will not be included in the initial contract award however may be added at a later date subject to further funding and formal agreement by both Parties, via a contract extension.

Lot 1:

Phase 1: Learning Needs Assessment

The Learning needs assessment will include:

- Identifying the primary cause/s of the problem, opportunity, or need
- SWOT analysis of the current situation, linking in with the CHS commitment 7
- Identifying audience/s with capability gaps, with reference to existing Leadership competencies, business competencies and technical competencies in Plan International or any emerging competencies as a result of this consultancy. (Staff, middle management, senior leaders).
- Identification of areas where performance problems, opportunities or needs are caused by a lack of skills, knowledge or required behaviour.
- Identification of areas where the organisation or specific teams are performing well and document good practices that have demonstrated the potential to scaling-up within a country, region or at the global level.
- The identification of best practice and resources in the sector.
- A review of the current tools, trainings, and material available and platform for sharing and learning these resources
- Reflecting on recent audits – e.g., ECHO/CHS – how can we strengthen the areas highlighted for improvement in the recommendations
- Competency frameworks – how can we incorporate these more effectively to support professional development?
- A recommended solution:

(1) What are the tools, resources and platforms for sharing and learning that Plan could CONTINUE, STOP and START CREATING/ADAPTING in view of the results and analysis of learning needs.

(2) Learning strategy in order to meet the three priorities under the Scaling Up humanitarian impact.

This learning needs assessment will provide management with a clear understanding and approach to addressing gaps in the organisation capacity to scale up humanitarian impact by:

A) assessing where Plan International currently is as an organisation with regards to the scaling up humanitarian impact priority compared to the desired position.

B) Provide Plan International with a clear understanding of the learning needs of the staff based on the revised global strategy with regards to the priority Scaling up Humanitarian Impact and recommendation on how to approach this.

The consultant is expected to collate and review existing tools and resources (both internal and external to Plan International), identify gaps and recommend, (1) What are the tools, resources that Plan could CONTINUE, STOP and START CREATING/ADAPTING in view of the results and analysis of learning needs. (2) Learning strategy in order to meet the three priorities under the Scaling Up humanitarian impact on the needs identified, in collaboration with the Plan International Humanitarian team, Performance Organisation, Learning and Leadership (L&D) staff and HR at the CO and NO level.

Lot 2

Phase 2: Learning Needs Assessment Implementation

The full scope of lot 2 will be defined at a later stage depending on the outcomes of Phase 1. Following the Learning needs assessment and based on the recommendations received Plan international would like to work with a consultant to implement the recommendations to ensure Plan International offers all staff, and partners, the learning opportunities and supports the organisation to **scale up our humanitarian impact**.

Plan international reserves the rights to not move forward with the second phase (Lot 2) if our internal circumstances change or further funding is not secured. A Contract Addendum will be required to award and initiate Phase two of this consultancy.

Scope

A systematic identification of learning and development needs is a critical step when designing a learning and development plan. This step should be an iterative process and should be aligned to the organisation's strategy and business plan. The needs could come from individuals, the organization, and the external environment. Staff define their personal development plan (short term or long-term goals) to acquire the knowledge and skills to perform a task better or perhaps to gain some qualifications. The organization defines the needs based on consultation with countries offices during the annual planning and budgeting process. The external environment may be driving needs when there are new government policies that will affect the work of Plan International at all levels and staff need to be aware of those to perform their task better.

The consultancy shall be delivered through remote, desk-based work in collaboration with members of the Humanitarian, POL&L (L&D) and HR teams.

Methodology

Recognizing and building on Plan International's years of experience in building and strengthening staff capacity is key in the approach to this consultancy. And this includes, but is not limited to, having conversations with key informants, review and analysis of documents, and providing an oversight from Plan International. This consultancy is open to discuss creative ways of delivering the outputs with the consultant(s). The consultant will be responsible for ensuring all work is carried out in line with Plan International's Code of Conduct and local legislation. All methodologies and tools used and developed throughout the consultancy will be proposed by the consultant and reviewed by Plan International.

Expected outputs

The consultant is expected to ensure the following outputs for **Lot 1**:

- **Objective 1:** Review existing information around the strategy, current tools, trainings and materials and resources and competency frameworks (internal and external). Including the identification of best practice in the sector and reflecting on recent audit findings.
- **Objective 2:** Complete learning needs assessment including identification of priority staff.
- **Objective 3:** A document providing a clear outline of the learning needs assessment findings and recommendation.

The details of outputs for **Lot 2** are dependent on the outcome of Lot 1's recommendations, however the overall output is to:

Support Plan International to implement the recommendations ensure Plan International offers all staff, and partners, the learning opportunities and supports the organisation to **scale up our humanitarian impact**.

Deliverables

Deliverables Lot 1
Inception Report detailing the workplan (methodology, timeline and budget)
Conduct the Learning needs assessment
A document providing a clear outline of the learning needs assessment findings and recommendation

Deliverables Lot 2
Inception Report detailing the workplan (methodology, timeline and budget)
Support Plan International to implement the recommendations ensure Plan International offers all staff, and partners, the learning opportunities and supports the organisation to scale up our humanitarian impact .

The consultant will share all notes, materials, and data collected from all steps with Plan International.

Duration and Time

The consultant will be contracted up to **12 days** for **Lot 1**, between the period of **February-March 2023**. *Please note the below timeframe is a suggestion and we are open to alternative proposals.*

- **Objective 1:** Review existing information around the strategy, current tools, trainings and materials and resources and competency frameworks (internal and external). Including the identification of best practice in the sector and reflecting on recent audit findings. **(3 days)**
- **Objective 2:** Complete learning needs assessment including identification of priority staff. **(8 days)**
- **Objective 3:** A document providing a clear outline of the learning needs assessment findings and recommendation. **(1 day)**

The Duration and timeline for **Lot 2** will be determined following the outcome out Lot 1.

Management Arrangements

The consultant will be identified and contracted by Plan International's Global Hub: Plan Limited. Plan International will be responsible for overall management. The Humanitarian team at Plan International will provide technical oversight and support to the consultant,

Technical Reference Group

A technical reference group composed of Plan International staff from the humanitarian team, the POL&L (L&D) team and Regional and Country Office staff, will support the consultant in the following:

- Provide support to the consultant by making introductions to key informants, sharing key resources and materials, making linkages to relevant initiatives, and supporting the dissemination of surveys and other data collection methods.
- Provide feedback, comments and edits to relevant drafts of key deliverables

3.2 Instructions to Tenderers

These instructions are designed to ensure that all Bidders are given equal and fair consideration. It is the Bidders responsibility to ensure their offer is complete and that you provide all the necessary information asked for in the format specified, or risk your offer being rejected. Further details can be found in section 9.1 of this ITT document, **'Submission Checklist.'**

Women-owned businesses and companies actively engaged or advancing gender equality and women empowerment in the workplace are especially encouraged to apply.

Documents comprising this tender pack are as follows:

- ITT FY23 0178 Humanitarian Learning Needs Assessment (Plan Tender Dossier)
- ANNEX A: Scale up Humanitarian Impact Priority Table
- ANNEX B: Supplier Questionnaire
- ANNEX C - Non Staff Code of Conduct

Tenderers are required to submit their proposal, inclusive of all required annexes, via email to procurement@plan-international.org. Offers must be received by the deadline specified in the section '**3.3 Key Dates and Timelines.**'

The offer and all correspondence and documents related to the tender must be written in English

Individual Consultants and Companies are welcomed to submit proposals.

Each Tenderer or member of consortium or sub-contractor may submit only one offer.

Unless stated otherwise, all communications from Bidders in relation to this tender, including Clarification Questions, must be directed to procurement@plan-international.org and must include the ITT reference number: [ITT FY23 0178 Humanitarian Learning Needs Assessment](#)

3.3 Key Dates and Timelines

The following table outlines the key dates and timelines associated with this tender process. Plan International reserves the right to change these at any time as the tender progresses. To maintain transparency, fairness, and adequate time to prepare your offers, Plan International will inform all interested Parties of any changes to these key dates and timelines simultaneously and in a timely fashion.

Activity	Deadline Date
Issue of Invitation to Tender	5th January 2023
Deadline for supplier submission of clarifications questions	11 th January 2023
Deadline for Plan to respond to clarification questions	13 th January 2023
Deadline for submission of offers	19th January 2023 23:59 GMT
Consultant presentations / interviews	W/C 30 th January 2023
Contract Award	By 2 nd February 2023

3.4 Pricing

Bidders are required to submit a financial proposal including daily/hourly fees and all relevant costs. All prices must be quoted in GBP and exclusive of Value Added Tax (VAT). For consultants/suppliers outside the UK please submit your financial proposal in both GBP **and** your invoicing currency.

It is expected that prices will be fixed for the duration of the contract and quotes valid for a maximum period of 90 calendar days following the Closing Date of this tender. If for any reason you are unable to guarantee fixed pricing for the duration of the contract, any projected price increases should be clearly stated in your tender.

To ensure a fair and transparent process, Plan International will not be able to divulge budget information relating to this tender or associated Projects. It is expected that Bidders submit their best possible financial offer at the point of submission.

The successful Bidder will be required to pay their staff who work on this contract **at least** the National Living Wage.

4. Selection Criteria

Proposals will be assessed against predetermined criteria which has been developed and agreed by the Tender Panel prior to launching this Tender process. The information gathered in **the technical proposal** and any other requested documentation, will be used to evaluate and score each proposal against this set criteria. Please find further details in the below table:

	Criteria	Tenderers must demonstrate.....	Weight
Compliance	Tender Compliance and Completion	<ul style="list-style-type: none"> Satisfactory completion of all documentation requested with sufficient information, submitted no later than the Closing Date specified. Agreement to our mandatory policies as set out in 'Annex E- Non Staff Code of Conduct.' 	Pass/Fail. Bidders who do not meet these minimum requirements will not have their Bids further assessed.
Technical Proposal (65%)	Required Experience	<ul style="list-style-type: none"> Strong knowledge of and experience working in the humanitarian sector Extensive experience in planning and conducting needs assessments and capacity building initiatives (either multi-sector or humanitarian thematic areas). Experience in developing guidance and ability to distil various viewpoints into cohesive guidance and processes. Knowledge of how to apply the Core Humanitarian Standards in practice. Experience developing tools and processes to track progress and develop personal development plans Experience and knowledge of working with and designing learning initiatives and programmes for multi-cultural teams in INGO settings Strong research and analytical skills. Excellent written and verbal communication skills in English. Computer skills, including MS Office, Excel, PowerPoint, online survey tools. 	65%
	Proposed Methodology and Project Timeline	<ul style="list-style-type: none"> Technical Proposal clearly outlines the proposed methodology for the assessment and a comprehensive timeline including activities, deliverables, resources and 	

		deadlines. - Technical Proposal provides a realistic estimation of Phase 2 activities and budget (optional)	
Financial Proposal (30%)	Pricing Schedule	- Economically advantageous for the organisation	30%
Gender Responsive (5%)	Gender Sensitive Practices and Policies	As part of our ongoing Gender Responsive Procurement Initiatives, Bidders will be allocated 5% of the overall score if they meet one or more of the following: <ul style="list-style-type: none"> ▪ If headed up by a woman ▪ If supplier is a women-owned business: A legal entity in any field that is more than 51% owned, managed, and controlled by one or more women. ▪ If the % of women in management positions is over 35% ▪ If % of women workers is 55% or above ▪ If robust gender equality initiatives are in place and active. E.g. WEPS signed, gender equality procurement policy, any additional gender-sensitive program implemented. 	5%

5. Evaluation of offers

The Tender Panel will review all Bids to ensure they meet the minimum requirements listed under the 'Compliance' section in the above table. Following this, each Bid will be assigned a score on the basis of predetermined criteria and their associated weighted scorings.

The contract(s) will be awarded to the Bidder(s) who represent the best overall value for Plan International in terms of the evaluation criteria set out above. By participating in this tender, you acknowledge and understand that Plan reserves the right to:

- Decide not to award to any supplier
- Decide to award to one or more suppliers
- Decide to readvertise the opportunity
- Not necessarily accept the lowest cost offer

Notification of award of contract will be issued via e-mail.

6. Terms & Conditions

By submitting a Bid as part of this Tender process, you also acknowledge and understand that:

- Plan International will not be liable for any costs or expenses incurred in the preparation of your offer
- You or your company will undergo vetting checks against an Anti-Terrorism and Sanctions Database as part of due diligence protocols
- Plan International reserves the right to keep confidential the circumstances that have been considered for the selection of the offers
- Part of the evaluation process may include a presentation from the Bidder and a site visit by Plan International staff, where applicable and necessary
- Plan International reserves the right to alter the schedule of tender and contract awarding
- Plan International reserves the right to cancel this tender process at any time and not to award any contract
- Plan International reserves the right not to enter into or award a contract as a result of this invitation to tender
- Plan International does not bind itself to accept the lowest, or any offer
- Any attempt by the Bidder to obtain confidential information, enter into unlawful agreements with competitors or influence the evaluation committee or Plan International during the process of examining, clarifying, evaluating and comparing tenders will lead to the rejection of its offers and may result in the termination of a current contract where applicable
- You accept in full and without restriction the conditions governing this tender as the sole basis of this competition, whatever its own conditions of sale may be, which you hereby waive
- You have examined carefully, understood and comply with all conditions, instructions, forms, provisions and specifications contained in this tender dossier. You are aware that failure to submit a tender containing all the information and documentation expressly required, within the deadline specified, may lead to the rejection of the tender at Plan International's discretion
- You are not aware of any corruption practice in relation to this competition. Should such a situation arise, we shall immediately inform Plan International in writing
- You declare that you are affected by no potential conflict of interest, and that you and our staff have no particular link with other Bidders or parties involved in this competition. Should such a situation arise during performance of the contract, you shall immediately inform Plan International in writing
- You accept Plan International's standard terms of payment which are 30 days after the end of the month of receipt by Plan of a proper invoice or, if later, after acceptance of the Goods or Services in question by Plan International Ltd

7. Plan International's Ethical & Environmental Statement

- The organisation should establish environmental standards and good practices that follow the principles of ISO 14001 Environmental Management Systems, and in particular to ensure compliance with environmental legislation (if applicable)
- The organisation should seek to set reduction targets in areas where the organisation's activities lead to significant environmental impacts

8. Submission Checklist

Please note Plan International are unable to accept submissions which are accessible by an online link, for example SharePoint, Dropbox etc. Please submit the documents as email attachments.

Document	Form
Technical Proposal	<p>Should include:</p> <ul style="list-style-type: none"> • Consultant (s) CV and relevant experience or Company Profile and contact details • Proposed methodology including detail of activities, deliverables, number of days and resources proposed per activity and proposed project timeline.
Financial Proposal	Should include daily/hourly fee and breakdown of fees per activity/deliverable.
Annex B - Supplier Questionnaire	Please complete with all requested information and return in word format.
Annex C - Non-Staff Code of Conduct	Please sign and date this document and return in PDF format.