

# **Organisational Development Period Offer**

## **Generic Debrief to Tenderers**

### **1. Overview**

1.1 AusAID wishes to thank all who tendered for the Organisational Development (OD) Period Offer (PO). The tender was advertised on 9 December 2000 and tenders were called in six sub-sectors:

- Human Resource Management;
- Learning and Development;
- Organisational Performance Planning;
- Public Management and Administration;
- Information Technology; and
- Resource Management.

1.2 The tender was a very productive exercise for AusAID and attracted 87 complying tenders from individuals, firms, institutions and organisations nominating a total of 825 individuals against the above sub-sectors. The high overall quality of the tenders provided a very competitive field and allowed AusAID with the assistance of the Technical Assessment Panel (TAP), to make clear distinctions between individuals nominated.

1.3 In the Request for Tender (RFT), AusAID proposed to provide Tenderers with an oral, generic debriefing after contracts had been signed with the successful tenderers. In this case however, given the higher than expected number of tenders received and the high number of individuals nominated against the sub-sectors, the provision of an oral debriefing to all tenderers would be a major undertaking which unfortunately, is beyond our capacity to provide. Accordingly, the following summary of the common strengths and weaknesses of the tenders received (as identified by the TAP) is provided to assist tenderers to formulate future AusAID tenders.

1.4 Given the number and quality of the tenders and individuals nominated, a number of tenderers and individuals have not been awarded POs and many of the contracts awarded do not include all of the individuals nominated. A number of individuals were rated technically suitable by the TAP, but some of the lower rated, technically suitable individuals were not offered contracts. This was because in most categories, AusAID's needs were met without offering contracts to all technically suitable individuals.

### **2. About The Technical Assessment Panel (TAP)**

2.1 The TAP comprised appropriately qualified AusAID representatives and independent external specialists. The TAP members ranked tenders and individuals on the basis of their technical merit based on the tender content against AusAID's specifications as set out in the Terms of Reference (TOR) contained within the RFT. The following summarises TAP member comments on the common strengths and weaknesses of the tenders received.

### 3. Inclusions Which Strengthened or Weakened Tenders

#### General Comment

#### Strong Tenders

3.1 In broad terms, the TAP found that tenders which rated well in the technical assessment generally:

- were prepared with the reader in mind ie. it was logically and clearly set out and presented the information in an easily accessible manner giving TAP members the maximum opportunity to consider the tender and to rate it against others;
- were clear about what was required and when referring to individuals, used examples to demonstrate their claims against individual selection criterion;
- fully complied with AusAID's documentation requirements as set out in Tender Schedule B of the RFT;
- tailored the content of Curriculum Vitae to the TOR and Selection Criteria;
- showed their understanding of the selection criterion. For example, in demonstrating their understanding of the aid program, successful individuals restated in their own words what they saw as its objectives and priorities; and
- clearly identified their role in any given process.

#### Weaker Tenders

3.2 The TAP also found that tenders which rated poorly in the technical assessment generally:

- were poorly structured, making it difficult for the reader to find key sections;
- did not show an appreciation that the technical proposal (or response) was the key document. Tenderers risked being marked down where their responses depended largely on what was contained in their CVs:
  - in some cases, the response simply repeated the CV content;
  - in others, the response included data which did not appear in the CV; and
  - in yet others, very little information was provided in the response but extensive detail was provided in the CV;
- claimed that individuals had done something but failed to provide supporting evidence; and
- often used the same words to respond to all or a number of the selection criteria for all nominees. This tended to reflect adversely on the credibility of the tender.

#### Individual Consultants

#### Selection Criterion A

3.3 The best tenders from **individual consultants**:

- in relation to **Criterion A1**, described their office (including information technology and communications) facilities, their administrative support/arrangements and their financial management capacity; and

- in relation to **Criterion A2**, set out their approach and capacity to deliver quality outputs, set out some of their experience and explained (for example) how a report which they had produced had been accepted by the client; and
- the quality of their tender was considered by the TAP to be a good indicator of this capacity.

## **Firms and Organisations**

### **Selection Criterion A1 (capacity to access additional consultants)**

3.4 Firms which rated well against this criterion:

- provided a short (one to two paragraph) introduction to the firm to set the context;
- in addressing capacity to source consultants:
  - provided information about the management and content of their consultant database;
  - addressed the extent (including the variety of discipline and sectoral coverage) along with the quality of their database (one firm gave details of its pre-listing screening processes);
  - demonstrated that theirs was a “living database” which is continually updated with CVs being updated, added and removed regularly; and
  - addressed the issue of rapid response giving specific details of their procedures for the quick turnaround of requests;
- demonstrated linkages with:
  - appropriate overseas firms and institutions which may also be able to provide additional expertise to and assistance/support for teams in the field;
  - like or complementary firms or organisations, government departments and institutions both in Australia or overseas; and
  - national and international “centres of excellence”.

### **Selection Criterion A2 (capacity to provide office, administrative and financial support)**

3.5 Firms which rated well against this criterion:

- set out how they would manage the consultants contracted through the PO, including their proposed mobilization procedures identifying:
  - issues (such as obtaining visas, travel and health insurance) and illustrated their experience in dealing with factors which can delay mobilisation;
  - the provision of briefing to consultants to give a clear understanding of the assignment, AusAID’s and the Partner Government’s requirements along with reporting requirements and security considerations (where appropriate);
  - details of in-house team management expertise along with backstopping arrangements (technical and professional) including support in Australia and overseas;
  - the debriefing of the consultant and an evaluation of the activity on the completion of the assignment along with the recording of lessons learnt; and

- provided details of their office accommodation (including access to offices overseas), systems (including any IT networking arrangements) and financial support arrangements.

### 3.6 Examples of sound approaches include:

- “X employs Y full time professional and administrative staff with management, commercial, legal, accounting and computing qualifications and experience... Skilled project managers provide contract negotiation, recruitment, budgeting, invoicing, procurement and payroll services along with experience in management of multi-disciplinary and collaborative research and technical advisory projects...”;
- “X’s financial systems are all compliant with Commonwealth audit standards and are audited annually by (company) Y”; and
- “Experienced mobilisation and support personnel contract, mobilise and support advisers and establish management systems in overseas locations. They negotiate contracts with consultants to define the TOR, reporting requirements and lines of authority and communication. The contract includes procedures for travel, accommodation, insurance, medical, evacuation and security arrangements, payment of mobilisation advances and procedures for making progress and final payments...”.

### **Selection Criterion A3 (capacity to prepare high quality documents)**

#### 3.7 Firms which rated well against this criterion:

- described their QA system;
- explained the processes and practices in place to ensure that documents are of high quality (both technically and editorially) or described any arrangements with sub-contractors for quality control of documentation;
- submitted an adequately bound tender containing an accurate table of contents and no typographical, editorial or formatting errors;
- defined acronyms on first use; and
- detailed the IT and any other technical facilities available.

#### 3.8 Examples of a sound approach included:

- “has developed a quality assurance manual as part of the accreditation process”; and
- referred to professional affiliations that require certain standards of document preparation and presentation.

### **Selection Criteria A4 (additional services to be provided to LEPs)**

#### 3.9 Firms which rated well against this criterion:

- demonstrated a constructive approach to the inclusion of LEPs; and
- identified support and mentoring arrangements (both in-Australia and overseas) to be provided by more experienced professionals in the sub-sector.

3.10 Two strong approaches included:

- “Where LEPs are deployed, we initiate a well defined mobilisation strategy that emphasises professional development including report writing, continuous improvement strategies, counterpart communication and relationships, language/cultural issues along with financial systems and organisational communication. In addition, all LEPs are (where possible) assigned an in-country mentor as well as a peer support person to facilitate and support personal and professional development”; and
- a “Teaming” of experienced consultants with LEPs is our preferred policy. The “pairing” is arranged with established consultants who have provided services under AusAID contracts or who have worked as advisers on AusAID projects”.

## **SELECTION CRITERION B**

### **Bi (relevant work history, skills and knowledge)**

3.11 Higher scoring tenders presented sufficient information to enable an assessment of the individual’s claims. Examples include:

- “as Chief manager of Corporate Services, I was responsible for setting up and directing the corporate planning team in an organisation that had recently been fundamentally restructured with a changed business direction”;
- “as a member of the senior management team at the Authority, X was responsible for the co-ordination of the Authority’s corporate objectives and strategic plan, work practice review, co-ordination and production of the Authority’s budget submission to the board and day-to-day management of the corporate information system...”; and
- “As Team Leader of Project “X” from February 19xx, Y managed the project in developing country “Z”, preparing project annual plans, monitoring performance against planned outputs and co-ordinating the activities of a team of professional advisers ..”

3.12 The most common weakness in tenders that did not score well against this criterion:

- were that they were poorly presented or provided inadequate evidence of experience or qualifications to substantiate claims. In some cases a CV may have given some indication of appropriate experience in a particular area, however the remarks against the selection criteria did not develop or adequately describe the particular experience involved;
- responded only by listing the organisations where they had worked or the tasks they had performed rather than setting out their achievements and detailing how their experience related to the specific professional experience requested;
- tended to assume that senior experience (e.g. CEO, senior executive, senior academic) was self explanatory combined with a failure to expand the relevance of particular skills and experience to the selection criteria; and

- a failure to fully set out relevant employment history including commencement and termination dates or to provide details of recent consultancies and professional development experience.

**Bii (problem solving skills, especially in less developed countries)**

3.13 The strongest tenders outlined both the context and the nature of problem solving experience along with reference to methodological considerations. This was a superior response to stating, for example: “X has extensive problem-solving experience at a high level.”

3.14 Examples from higher scoring tenders include:

- “This project commenced immediately after the X incident, which effectively meant that over the following two years, each step represented a major milestone for all the parties involved. The consultant’s role was to implement a project that was sufficiently flexible to accommodate multi-partner needs in a climate of socio-political uncertainty”;
- “X is well aware of and experienced in the need to balance social, political and economic interests as demonstrated by the various senior positions he has held with a variety of government and non-government organisations here and overseas as detailed in his CV”;
- “X has some years experience in less developed countries dealing with difficult and sensitive environments and problems, including the resolution of situation Y while team leader during 1999. The key to the successful resolution of these problems included a good understanding of the cultural, political and economic system along with informal networks and the motivating factors of the key players.”

**Biii (oral and written communication skills)**

3.15 Higher scoring tenders considered more general issues of communication in different and difficult environments and gave examples of the application of a systematic approach to developing solutions to overcome communication challenges or gaps in a particular environment. Also important were language skills beyond English, as were negotiating skills and evidence of effectively presenting relevant material to decision makers. One strong tender provided a specific example of their skills including:

- “...has considerable experience in liaising with overseas government and semi-government agencies and has routinely interacted with a variety of stakeholders including farmers and...”.

3.16 Lower scoring tenders often focused on the production of written materials rather than referring to oral communication. For example:

- “Mr X has made prepared numerous technical and academic papers which are listed in his CV.”

**Biv (interpersonal skills, cultural sensitivity and ability to interact effectively with people in partner countries)**

3.17 The best responses indicated a familiarity with the sensitivities of cross-cultural work (whether in Australia or in developing countries) and the development of an approach to overcoming those sensitivities. One sound example included:

- “...Over that time she has developed a respect for people and their values across cultures and has actively practised an inclusive approach to partner agencies and counterparts on in-country missions. This approach, while effective, presents challenges in developing countries where human and material resources are limited and cultural sensitivities on the ground cannot be ignored if the project is to work”.

**Bv (understanding of the need to integrate gender and governance policies/initiatives in AusAID’s programs and projects)**

3.18 The stronger responses demonstrated knowledge of the particular policies, an understanding of the integration issues associated with their application and provided specifics of gender awareness training. Sound examples included

- “...has sound experience in management of AusAID projects which has spanned the change from ‘Women in Development’ to “Gender and Development”. This has necessitated the development of an understanding of the ways in which project activities, outputs and outcomes can impact upon or enhance the productive role of gender groups in the community”; and
- “In many of the client countries where the consultant has worked, the need to enhance the role of women and other groups in project development and delivery led to specific project components directed at these objectives”.

3.19 Perhaps the least useful approach to addressing this criterion was that of the consultant who had “noted” AusAID policy in this regard. While a number of individuals claimed knowledge of AusAID’s Gender and Development policy for its consultants, the weaker responses:

- often failed to provide any clear evidence that the consultants had direct experience and/or training in these areas; or
- in discussing Gender and Development, discussed work-place gender balance or other EEO principles instead.

**Bvi (capacity to lead and/or participate in teams)**

3.20 The more successful tenders presented evidence of experience as a team leader/member over a range of projects, specifically identified, with the individual’s role clearly identified. Evidence of successful management of multi-disciplinary teams also rated highly. The best responses also pointed to successful involvement in projects where collaboration within or across disciplines was required. Some better examples included:

- “As an executive and consultant X has demonstrated the ability to lead multi-disciplinary groups, an important element of which has been recognition of the need for teambuilding at the start of the project to clarify ground rules and reduce the potential for conflict between team members.”; and
- “The team for this project included: economists, health professionals, engineers, project managers as well as social, cultural and environmental experts from...”

3.21 Overall the weaker tenders tend to assume that their capacity in this area was (or would be) understood from a broad statement of experience such as “X has managed many high level teams.”.