



**Consolidated List of Bidders' Questions and WIPO's Answers**

March 24, 2010

n°	Questions	WIPO's Answers
1	<p><b>Annex II "Response Requirements",</b> pg 6, section 5, paragraph a), states:</p> <p><i>"The anticipated ambitious timeline for the training program would require sufficient training Resources to permit concurrent execution of workshops in the second quarter of 2010, as indicated in the Terms of Reference (Annex I)."</i></p> <p>We have not found any timeline for the project in Annex I and no indications of how many participants should be trained in which time line, how many in quarter 2 on which subjects?</p> <p>Would you be able to supply a basic time line, with how many participants total per month and year for the respective courses?</p>	<p>These are Terms of Reference where the successful bidder will enter into a contract with WIPO for a 3-year period to deliver programmes according to their bid submission. Therefore if successful, you will be required to hold your prices for a period of 3 years. Planning for WIPO training now requires a higher degree of agility than previously needed. This RFP is designed to provide some of that agility. We understand your position in tendering hypothetically; if successful there could be reasons for further discussion and guidance from WIPO regarding needs and resources; and some adjustments may need to be made; total resubmission however will not be possible.</p> <p>Please refer to Section 3.18: Objectives for the programme in this RFP – mainly to underpin and support the PMSDS initiatives currently occurring at WIPO as the implementation of a PM is integrated into WIPO activities. Implementation of this programme will commence during the second half of 2010, with priority given to the support needs resulting from the PMSDS training project. Those support needs for the 2nd quarter will be prioritized according to the feedback and analysis after the period of PMSD training.</p> <p>The ambitious comments apply to the whole of the training agenda set out in the RFP.</p>

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		<p>WIPO expects to engage a contractor-vendor/s by early July, which programmes will be delivered in quarters 3 and 4, with a higher emphasis in quarter 4 and a gentle start in August.</p> <p>Please Refer to Annex I – TOR, Sec 3.1: <u>Programme Scope and Approach</u>: 15 participants is the general number per group for costing purposes - except for coaching, which is one-on-one; pairs and up to a small group of 3, and requires an hourly rate.</p>
2	<p>More complete indications of the potential number of participants in each course would be very helpful. For example, “all managers” would represent how many total participants? If you could provide a grand total number of days and/or a grand total number of participants, even hypothetical, then this would offer a more precise alignment for the bid calculations from the providers and would allow comparing on a common ground. (We understand that there is no obligation for WIPO to fulfil the hypothetical volume in any respect).</p>	<p>We suggest you cost on a per-course basis for groups of 15 participants. You could spread your development costs over a 3-year period or price it as a separate cost item and include it in a daily rate, or present it as an cost item in its own right and cost delivery separately as a daily rate. You could probably think of other costing methods.</p> <p>Precise information: Difficult at this stage as PMSDS training is not finished and subsequent needs have therefore not yet been mapped. Here, however, is a possible scenario which could emerge once those needs have been established: For example, in Annex II, which outlines courses – Category B – one course specified is a Level 1 Course entitled <i>Essential guidelines to implement and help you manage people</i>. Depending on needs, this course could perhaps be delivered 3-4 times a year (over 3 years) and each time there could be up to 15 participants unless an actual number of participants is specifically mentioned. For e.g. Oral Communication for Managers and Customer Service in a UN Context being 2 examples. So there are a number of ways you can cost your product/s. Please refer to pricing schedule suggestions and use them to fit with your needs. You question about how many Managers may presuppose that all Managers would be required to do the course and this is not a requirement at present though it may be in due course.</p>

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3	While this seems very much a change management process, there are no courses on change management itself. Is change management curriculum provided in another program or could this be proposed in the current request and if yes for what target population (all managers)?	For this RFP the main aim is to underpin and support the introduction of a new performance management system and elements of change management have been included in that training initiative and in other existing areas of training.
4	How significant is the category D "Ethics skills and Competencies" compared to the other categories? Will all categories be treated equally in terms of amount of trainings/ resources?	Ethics is an important category and a new one for the organization. Resources will be allocated on a 'need' basis and from year to year, influenced by strategic goals and demands in response to developing priorities aligned with WIPO's substantive work
5	What constitutes an ethical dilemma for WIPO to be covered in the training as a case study? Would that be an ethical dilemma with regard to the contents of WIPO's work (e.g. the ethical dimensions of patent law, access to genetic resources, etc.)? Or would the case studies rather concern topics such as general loyalty to the organisation / competences at the workplace / conflicting interests between stakeholders or conflicts between personal and organisational values?	<p>A successful bid would focus on the latter types of situations for the development of scenarios, i.e. those listed in your question "<i>Or would the case studies rather concern topics such as general loyalty to the organization / competences at the workplace / conflicting interests between stakeholders or conflicts between personal and organizational values?</i>"</p> <p>Note: WIPO would expect to have input to guide the successful bidder in the development of appropriate scenarios that reflect the WIPO reality in this area.</p>
6	Please clarify the apparent inconsistency between Para 19 in Annex 1, ("Proposals may be submitted for the whole of the program and/or specific Category A-G deliverables within the program"), and bullet point 4 on page 2 of Annex II ("Proposals submitted must deliver the whole training program").	You could submit a costing in your proposal for all the initiatives/courses in Category A. For example, in Category A there are 7 different initiatives/courses; all in some way relate to the general area of <i>Communication Skills and Competencies</i> (the heading for this category). You could decide to put in a proposal for all 7 or 1 or 2 or 3 or 4 or 5 or 6 of the initiatives/courses within this category. That is, you are not required to tender for all initiatives in any category. You could also choose to submit a price for initiatives/courses in other categories if you wished
7	Please outline the infrastructure that WIPO has in place to manage the overall programme for example if different categories were to be awarded to different suppliers (para 28 of main	WIPO Management will manage the project according to organizational needs and priorities. This may be reviewed in the future. At this point in time no

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	document)? Would WIPO welcome inclusion of a programme management and administration element in our proposal?	separate management proposal should be submitted; if required this will be asked for separately in due course. If you feel you have the capacity to offer such a service you may wish to highlight that in your submission.
8	Does WIPO have existing models, approaches and tools for some or all of the topics to be covered by workshops: for example, do you have a clear definition of the practical elements of "advanced project management in the WIPO context" or an agreed WIPO view of "the difference between leadership and management"?	<p>Most of the topics covered by the categories and in each course/initiative are generic. Where training already exists, there are also existing guidelines, models /approaches that would be discussed with successful bidders.</p> <p>Currently in the advanced project management course you mentioned, there is not one specifically for WIPO though a number of initiatives in this area have been piloted with reasonable success. There are courses in project management specifically for other UN agencies and WIPO would liaise with the successful bidder in guiding the development of the course/initiative based on this collective knowledge and the organizational needs.</p>
9	The RFP implies that workshop facilitation will be the entire responsibility of the contractor(s). Are you open to involving WIPO staff in the facilitation of the programme? If "yes", to what extent could you foresee this approach being used (eg brief event introductions from senior managers, co-facilitation by WIPO managers of certain workshops, eventual replacement of external contractors with internal resources)?	<p>Yes, there is WIPO involvement in the delivery and facilitation of courses though this depends to some extent on the requirements and needs of the training itself.</p> <p>Brief introductions etc would not represent a problem. Co-facilitation for this project is very limited and replacement of contractor most unlikely. There is no intention for train-the-trainer type outcomes for this project.</p>
10	Could you foresee involvement of WIPO staff in the design and development of workshop and support material, (eg to increase WIPO ownership of materials, increase efficiency of any research required, reduce costs), or will this be the sole responsibility of the contractors?	Yes, certainly. WIPO staff will either carry out or be involved in the needs analysis with the successful bidder and in the subsequent design and development of the course and materials. This, of course is likely to vary from one initiative/course to the next depending on the outcomes required.
11	Would you describe WIPO as having a consistent culture across the organisation or do specific teams or functions have distinct approaches to their work influenced by the	No, WIPO does not have a strong, consistent organizational culture across the organization at present. Though a culture exists, it is <b>NOT</b> made explicit to

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	<p>personalities and preferences of their leaders? Could you foresee the training being managed team by team to maximise opportunities to tailor discussions and to work with leaders influential to each team?</p>	<p>internal and external stakeholders in a cohesive and consistent manner. A culture does exist however and part of the outcome of this RFP in supporting the PMSDS initiatives is to make this culture more explicit and visible.</p> <p>Yes to the query about team-by-team management.</p>
12	<p>Do you foresee specific circumstances where workshop participants would have "varied experience" (para 24 of Annex 1) - eg where teams are deliberately trained together - or would this simply be a consequence of the scheduling process?</p>	<p>Yes, it may be the case that some teams would want to participate in the course together; though especially for courses which are open to all staff (see Annexure II) the participants could represent a cross section of the organization, with different professional and personal experiences.</p>
13	<p>What process do you foresee for ensuring that staff sign-up for the training which best meets their needs? Why is participation in workshops to be voluntary (para 25 of Annex 1)?</p>	<p>WIPO is in the process of changing some of its training requirements. It is expected that some of the initiatives/courses could become mandatory courses for all staff in the nominated categories. While others would always be voluntary and there would not be a requirement for staff to complete the course, only those interested in the field and topic areas would be likely to attend.</p>
14	<p>Are you able to further clarify what a "more advanced delivery option" for the MINI modules might look like? Does "MINI" stand for something specific? Would it be acceptable to develop a workshop version of these topics and a separate, but consistent, set of materials for use in coaching sessions (eg in a "coaching toolkit")?</p>	<p>The main idea is that the messages in mini modules are core message or messages WIPO wants reinforced throughout its training. Therefore these messages must be consistent in form and format for quality control and to ensure the same messages are always delivered. Therefore these mini modules are similar to core modules which will be portable and used in more than one module as refreshers or orientations for other workshops. A toolkit could be suitable as long as the main messages remain the same.</p> <p>RE: Coaching sessions: The messages in the mini modules will not always be used only for coaching but will be required to be used in a variety of contexts, perhaps by different delivery contractors. So keeping the same or very similar template for these is important.</p> <p>RE: Advanced delivery option: Sometimes the participants in a group consist of</p>

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		<p>Managers whose skills are already or partially developed so having advanced resources to offer them can make it less monotonous/<b>boring</b> for them to become involved; motivated and enthusiastic These could be case studies based for instance.</p>
15	<p>Para 29 of Annex 1 states that coaching may extend to topics beyond those in Categories A-F. Is it reasonable to assume that these additional topics would be restricted to "personal development" areas similar to those in the workshops or should our team include dedicated coaches experienced in working with senior managers on "life" or business issues?</p>	<p><b>Coaching will be on a demand basis. Therefore a client could have several needs that cut across the different categories. Any applicable mini modules in these categories would be included in your programme as core or basic knowledge and then you would shape your coaching programme accordingly.</b></p> <p><b>That is why you have been asked to price this category on an hourly basis rather than a programme basis.</b> So there is no need to limit responses to the topic stated in the document. It is expected that coaching needs and activities could grow considerably in the 3-year period of the contract. <b>If you have other experience which fits directly into the identified client need, it can be discussed directly with the client when the actual programme is being planned and if it can feasibly be considered, then this can be added into the overall programme during the planning stage for that specific client, as long it is part of the identified coaching needs and agreed to.</b></p>
16	<p>Please provide further guidance on the depth required in the "facilitator notes" which will be required: Would these be limited to broad guidance on training activities, models and other points to be covered or should they be sufficient to provide the guidance required by a new facilitator to run the events exactly as run previously? Is the Facilitator Notes Template mentioned in para 23 of Annex I similar to Annex II appendix 3?</p>	<p><b>Facilitator Notes:</b> For the proposal, just broad guidance is acceptable. The successful bidder/s however will be required to submit more detailed notes in a WIPO format. Successful bidder/s will be provided with the Template for these during contract negotiations. <b>The Terms of Reference state these will be required 2 weeks prior to the start of the first delivery. This is designed to provide flexibility, for example, this will allow the vendor/s to change their delivery team and still ensure that the programme will be delivered in the intended manner.</b> It is a quality control on the part of WIPO and should not be interpreted in any other way. It also allows flexibility in case of</p>

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		<p>sickness, e.g. if the vendor has another trainer that trainer could fill in and feel comfortable <b>delivering the programme</b> and WIPO would have assurance that the messages and substantive content would be delivered and emphasized in the intended manner. This is also crucial and instrumental in aiding WIPO to develop and build a more visible organizational culture over time.</p>
17	<p>Please clarify the apparent inconsistency between the 5 program deliverables detailed in Section 4 of Annex 1, (para 30-41), and the 4 deliverables which form the basis of the price table on page 2 of Annex IV.</p>	<p>Category G is the coaching category. These sessions will be customized to specific client needs and demands. However if some of those needs incorporate content areas already covered in mini modules, these will form part of the content for the coaching to deliver (as they are portable modules they can be pulled into the coaching programme to form part of the substantive content of the coaching programme). However these will not necessarily have been developed by the coach unless the coach is also the successful tender for the course in which the mini modules reside. For example if you are coaching a Senior Manager in the Communication area, you would incorporate into the delivery of your coaching programme a revision or first-time exposure (as determined by your needs analysis) of the following topics in Category A, Level 1: <i>Can't do without communications skills</i> :</p> <ul style="list-style-type: none"> <li>• Individualised communication profile (completed beforehand). Debrief</li> <li>• Identify methods of communication</li> <li>• Types of communication</li> <li>• Understanding confidentiality</li> </ul> <p>But you will not necessarily have developed them and therefore there is no need to actively cost them <b>into</b> your hourly rate. If you have submitted them as part of your proposal, <b>you do not need to</b> cost them into your hourly rate again.</p> <p>However as a coach you may wish to develop some or all of these mini modules yourself and it could also be the case that you could be asked to do so, in which case</p>

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		they would then be inserted into the other courses as modules developed by you to be used in both programmes.
18	Please clarify the difference between the time-line requirement of Section 3B of Annex II and Section & of Annex II.	Please see answer to question 1.
19	<p>The Price Table in Annex IV specifies that the costs of deliverables 1-3 should be included in the price quoted per workshop (deliverable 4). The impact of this is that the cost per workshop is significantly impacted by the number of workshops to be run, which is currently an unknown. Are you able to provide an initial estimate of the number of workshops which bidders can work with or should we make and explain an assumption (if so, how should we incorporate this into the price table)?</p> <p>Alternatively, would it be acceptable to provide a fixed price quote for deliverables 1-3 and then a price per workshop regardless of eventual volume of workshops required?</p>	<p>This is a reasonable alternative: <i>Alternatively, would it be acceptable to provide a fixed price quote for deliverables 1-3 and then a price per workshop regardless of eventual volume of workshops required?</i></p> <p>It is very difficult at this time to determine even 'guesstimate' numbers as the training required to support the PMSDS initiative has not yet been completed and therefore no planning for subsequent support training has been finalized.</p> <p>A wild 'guesstimate': A possible number of workshops could be between 2-4 per year for each initiative/course in each category, but this is a total 'guesstimate' and WIPO cannot guarantee the number of workshops per yer. Those numbers will be subject to the needs that present themselves at the end of the PMSDS training.</p>
20	Are you able to provide a brief summary of progress with the PMSDS implementation?	<p>It is progressing within planned expectations</p> <p>Generally it is being positively received, and there are requests for more training in related areas.</p>
21	<p><b>II. Content of the proposal and evaluation criteria</b></p> <p>1) Page 5 Para 22 says: "The estimated workloads indicated in Annex IV - <i>Price Schedule</i> are provided for information purposes only. However, Annex IV indicates "XX". We assume that an estimate was meant to be inserted and would appreciate this clarification. In addition, as, for example, Category A would contain 7 different workshops ranging from 1/2 day to 2 days, will you be defining the estimated numbers for each module in the category or are you assuming it is the same?</p>	<p>Yes 'XXX' is for you to insert your estimate.</p> <p>Please Refer to Annex I – TOR, Sec 3.1: <u>Programme Scope and Approach</u>: 15 participants is the general number per group for costing purposes, except for coaching which is one-on-one; pairs and up to 3 for a small group.</p>
22	We also note that in section 5 Para a) of Annex	At this stage we are not certain about the



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	<p>Il you speak of an "anticipated ambitious timeline", yet Annex I page 11 speaks of "ad hoc requirements" which would suggest a less than ambitious timeline and that all of the workshops within each category would not be delivered with the same frequency. Please clarify.</p>	<p>frequency with which workshops will be delivered, especially for the first year of delivery. That will depend on analysis of needs, based on what is required to support and strengthen the current PMSDS training by building capacity in related areas. Also on the resources which will be available for allocation once the needs are clearer.</p> <p>The reference to the ambitious timeline is a reference to the total training picture and the expected resource implications that WIPO is grappling with given the current and expected changes occurring at organizational level.</p>
23	<p><b>Annex I</b> 2) Page 7 Para 19 states that "Proposals may be submitted for the whole of the program and/or specific Category A-G deliverables within the program." Annex II, page 2, states "Proposals submitted must deliver the whole Training Program". Please clarify. Also in this respect, we presume that a proposal for coaching (G) would apply only to the category of deliverables (A-F) included in the proposal (e.g. if a vendor only includes categories A and B in their proposal, the offer in category G would only apply to A and B). Please confirm or clarify.</p>	<p>The delivery must be for the whole initiative/course but not necessarily for the whole category. <b>E.g. in Category A there are 7 different initiatives or courses. You don't have to bid or submit proposals for all of them. You may only want to be considered for 1 or 2 in that Category and if so, you must be able to deliver those 1 or 2 initiatives completely / not just some of the topics within them.</b></p> <p>RE: The coaching - you should specify any areas of coaching expertise you wish to include. See also answer to question 17 which may also help to clarify your query.</p> <p><i>RE: Please clarify. Also in this respect, we presume that a proposal for coaching (G) would apply only to the category of deliverables (A-F) included in the proposal (e.g. if a bidder only includes categories A and B in their proposal, the offer in category G would only apply to A and B). Please confirm or clarify.</i></p> <p>Not necessarily. You may be able to coach in some areas without having the appropriate pedagogical background and experience to develop materials and resources.</p>
24	<p>3) Page 8 Para 22 states that a half a day is 4 hours, Annex I, Appendix 1 page 1 states that a half day is 3.5 hours. If this difference is important, please clarify.</p>	<p>No, it is not important. A half day is between 3.5 – 4 hours maximum. Depends on the length of breaks. So you can plan delivery time and activities within those boundaries.</p>

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25	4) Page 8 Para 23 refers to a <i>Facilitator Notes Template</i> . We do not see this template in the RFP documents. Can you please provide this template?	The Facilitator Notes Template will be provided during contract negotiations with the successful bidder/s. For your information, the document includes, in reasonable detail, a description covering session by session (i) actions, (ii) topics and (ii) time allocations. Where WIPO requires quality control on building a brand or culture within the organization, or needs specific messages reinforced in a consistent manner in different training initiatives, these details could also include specific instructions or wording to be used in the delivery and these, too would be included in the Facilitator Notes.
26	5) Page 8 Para 35 and page 12 Para 37 say a cost for French translation and delivery option must be included in the tender, however, there is no line item for this in the Price Table. Nor do we see a place for costing the translation of the facilitator notes for all the workshops.	Translation may only be required at a later date. This costing is for your own benefit at this stage. You need to consider these costs now in terms of future capacity should you be the successful bidder and be requested to provide the translations at a later date especially if you have to buy in this capacity.
27	6) Page 12 Para 40 refers to Deliverable Five, as does the note on Deliverable One in the Price Table, yet we do not see a Deliverable Five in the Price Table. Shall we just add it or will you be preparing a new Price Table?	Deliverable 5 starts under : <b>SPECIAL INSTRUCTIONS FOR CATEGORY G – COACHING COSTING</b> in the pricing structure in the Pricing Schedule. This is the 5 <sup>th</sup> deliverable type
28	<b>Annex I-Appendix I</b> 7) In Annex I, Appendix I we see references to .5 day, 1 day, 2 days and 2 days intensive. If the difference between 2 days and 2 days intensive is relevant to this bid, please clarify.	'Intensive' days allows for a slightly longer day, finishing no later than 18:00. It also refers to the option to include some pre-attendance reading/homework, or homework after a day of training.
29	<b>Annex IV</b> In addition to the above-mentioned issues we note that under 1. Prices and quantities: 8) In Para 3 you refer to the course preparation as a one time cost. However, we do not see in the Price Table a line for the one time cost of preparing each module in each category. Shall we add these lines or will you be preparing a new Price Table?	You can add it in if you are pricing it as a separate cost
30	9) In Para 4 it states: "Training room costs must be included in your tender submission initially." Two paragraphs later it states "Should an off-site location be proposed..." Also in Annex II,	Yes, that is correct.

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	<p>Page 6 Section 7, it says to identify training rooms and equipment required of WIPO. Given the difficulty of receiving an estimate on the cost of a training room for an unspecified date and unspecified number of days for the next three years from a vendor, we assume that this is an option for potential bidders that have a training room on their own premises. Please confirm.</p>	
31	<p>10) Under Deliverable Four-Category G, we note that Category F is missing. Shall we add a line for this or will you be preparing a new Price Table?</p>	<p>The 5<sup>th</sup> category pricing starts with <b>SPECIAL INSTRUCTIONS FOR CATEGORY G – COACHING COSTING</b> Please include it under this category.</p>
32	<p>11) On the Price Table, in the table referring to Mini Modules and individualized coaching, the heading is 'Unit Price/hr'. This raises the question as to where the cost of developing the Mini Modules should be. Please clarify where you wish to see the design and development costs of the modules, in the appropriate workshop category (A-F) or in category G?</p>	<p>Please see answers to questions 17 and 30.</p>
33	<p>12) The website listed in the RFP cover letter Para 10 (where it is stated that any revisions would be posted) produces the following error message: Requested Page Not Found – 404. Please advise via email the correct web address if the response to vendor questions is to be posted there. Please also advise when you expect the answers to be provided.</p>	<p>The correct URL is: <a href="http://www.wipo.int/procurement/en/notices.html">http://www.wipo.int/procurement/en/notices.html</a>.</p>