

SCOPE OF WORK - Mission Retreat

I. INTRODUCTION

The USAID/Uganda Mission plans to hold a two-day Mission-wide retreat in order to incorporate new strategic directions, develop a more cohesive Mission culture, and increase mutual understanding through both better self-awareness and teambuilding. During the retreat, Senior Management will develop unifying work objectives that relate to the Mission's broader strategic goals and objectives.

USAID/Uganda is soliciting proposals from organizations or individuals with experience providing professional facilitation services for the period before, during and after the retreat.

II. BACKGROUND

The USAID/Uganda Mission manages one of the largest and most diverse assistance portfolios in the world. In FY 2011, the Mission's operating year budget (OYB) was \$321 million (M). The USAID development program contains 67 active assistance awards with a total multi-year portfolio value of \$939M. These programs are implemented by 165 staff, including 37 U.S. Direct Hire (USDH) employees, seven U.S. Personal Services Contractors (USPSCs), two Fellows, two Eligible Family Members (EFMs), six Third Country Nationals (TCNs) and 111 Foreign Service Nationals (FSNs). These staff are divided into three technical offices (Economic Growth, Health, HIV/AIDS and Education, and Democracy and Governance) and four support offices (Financial Management, Program and Policy Development, Acquisition and Assistance, and Executive), plus an innovative satellite office in Gulu, northern Uganda that coordinates regional relief and development efforts. The Mission's complex and challenging assistance program works across all development sectors, with funding from numerous earmarks and initiatives.

III. NATURE OF SERVICES REQUIRED

A. Project Background and Approach

USAID/Uganda has set aside a two-day period for a Mission-wide retreat that will, at a minimum, achieve the following:

1. Apply the Insights Discovery® Model to USAID/Uganda retreat participants as a tool for individual awareness and team development;
2. Discuss the results of the Insights Discovery® personal profile with the aim of improving teamwork and collaboration;
3. Conduct joint work objective planning and mapping for 35 Senior Staff;
4. Identify and gain consensus around an agreed set of leadership behaviors to improve effectiveness and Mission cohesion;
5. Build agreement around strategic priorities and future directions of the USAID/Uganda Mission; and
6. Identify evolving roles and responsibilities between the Gulu field office staff and Kampala home office staff vis a vis #5 above.

Offerors are invited to suggest a format and structure suitable for the achievement of the above-listed goals. Objectives 1, 2, and 5 are expected to take place with all staff (approximately 140 individuals). Objectives 3 and 4 will be with a smaller Senior Leadership Group of 35. Objective 6 will be with Senior Management and Gulu staff (approximately 25 individuals). Options for an optional parallel session with non-Senior Leadership should be included in the proposal.

B. Scope of Work to be Performed

The professional facilitator must have the skills and certifications necessary to achieve all of the project goals outlined in section A, Project Background and Approach. Knowledge of and previous experience with the Insights Discovery® Model is required.

1. **Data Collection and Analysis:** Carry out the necessary Insights® online evaluator for all staff attending the retreat. Identify staff concerns and major organizational and management issues. Where necessary, conduct focus group interviews, one-one interviews, and simple survey instruments which allow for anonymous responses.
2. **Retreat Agenda:** Develop a detailed schedule of activities. Consult with Mission leadership prior to final approval of the agenda and schedule of activities.
3. **Logistics Management:** Work with Retreat Oversight Committee (see Section V below) on all retreat logistics and preparations. Ensure all necessary materials and audio/visual equipment are on-sight for the successful execution of the retreat.
4. **Retreat Facilitation:** Attend each of the retreat sessions to act as facilitator and moderator. Include the use of a variety of techniques such as break out teams, organizational and communication games, plenary discussions, and other team building exercises. The objectives of each session should be clearly stated both at the beginning and end of each session. Exercises should be designed to elicit the maximum participation from staff members, and must reach out especially to the more reticent and/or less vocal participants.
5. **Retreat Evaluation Questionnaire:** Provide a Retreat Evaluation Questionnaire (REQ) that can be used to collect impact information immediately after the retreat. The questionnaire should be short and simple, and take no more than 5-10 minutes to complete. The questionnaire should attempt to get at staff perception of 1) their own effectiveness and productivity as a member of their team, 2) for supervisors - the effectiveness and productivity of their teams, 3) trend on overall mission morale (improving or declining), 4) how well they feel they understand the Mission's development vision and their part in its achievement, and 5) unresolved management and organizational issues which are within USAID's control that impact staff morale, effectiveness, and productivity.

6. **Post-Retreat Documentation:** Document the outcomes of the retreat for distribution to all participants. The responses, issues, outcomes and conclusions that result should be recorded by the contractor, organized and documented in a summary report to be submitted at the conclusion of the contract.

IV. SCHEDULE

USAID/Uganda is requesting the Contractor address in its proposal the timing to fulfill the key events keeping in mind that USAID/Uganda wishes to do the assessment in September 2012, and a retreat not later than two months after the assessment.

Proposed time frame:

- Retreat Planning and Preparation, including pre-event questionnaires, surveys and analysis (October 2012)
- Conduct Retreat (November 5-7, 2012)
- Prepare final report (Delivered to Mission two weeks after retreat)

V. OVERSIGHT AND SUPPORT

A Retreat Oversight Committee (ROC) will be formed prior to commencement of work by the Facilitators. The ROC will be responsible for reviewing, vetting and approving all deliverables in a timely manner. The chair of the ROC will provide an approval and/or comments within 2 business days, provided that page limits are adhered to.

In addition to oversight, the following logistical support may be available:

- Photocopies and limited document reproduction services. A request for all required services must be arranged well in advance of the event to ensure that documents will be made available.
- Stationary and office supplies for the retreat event. A request for all required supplies must be arranged well in advance of the event to ensure availability.
- Projector and Laptop for presentations during the retreat.
- Identification and procurement of retreat venue, including meals/refreshments for its employees during the retreat.
- Local transport of contractor and staff as needed between USAID offices, and retreat venue as required.

The contractor shall arrange its own transportation to and from the USAID offices and pay directly for their boarding and lodging.

VI. LEVEL OF EFFORT

The Contractor shall propose a level of effort to accomplish the tasks specified above. A six-day workweek is authorized in Kampala; telephone and videoconference facilities are available at the USAID/Uganda Mission for any communication or planning in advance of arrival in Kampala.

VII. REQUIRED EXPERIENCE

The successful proposal must demonstrate the best effort at reasonable cost emphasizing the following qualities:

1. Past experience with and use of the Insights Discovery® Model is required.
2. Substantial experience facilitating organizational retreats and promoting leadership development, and should be able to demonstrate knowledge of organizational processes, including strategic planning, communications and team building.
3. Demonstrated experience working with international development organizations employing multi-ethnic staff in multi-cultural work environments. Prior experience working with USAID will be advantageous.
4. Experience in Africa is required.

DELIVERABLES

A. Pre-Retreat:

1. Draft survey instrument and focus group questions for senior management review and approval.
2. Draft retreat agenda for review, comment, and approval.
3. Draft Retreat Evaluation Survey for review comment and approval.
4. Conduct necessary Insights ® analysis and reports.
5. In-brief meeting with Mission Director and Senior Staff.

B. Post-Retreat.

1. A draft summary report providing a record of retreat proceedings, evaluation results for the retreat, and outline of Mission Action Plan for Mission comment. USAID will have 5 days from date of receipt to comment.
2. A final report incorporating any Mission edits or suggestions, due two days after receiving Mission comments.
3. A summary report for senior management and one for all staff.
4. Out-brief meeting with Mission Director and Senior Staff.

IX. TECHNICAL SELECTION CRITERIA

1. Degree of creativity and innovation in the proposed approach to achieving the stated objective of the retreat (30%).
2. The breadth and relevance of prior experience of the organization or consultant (30%).
3. Demonstration of a) a clear understanding of organizational concerns and operating context b) an ability to impact techniques for promoting organizational change (40%).

Government Estimated Budget Details:

Illustrative Level of Effort (for internal use only)

Item	Description	Estimated time
1.	Pre-Retreat Planning – Data collection and analysis, preparation of agenda	7 days off site 5 days on site
2.	Retreat facilitation	3 days on site
3.	Post retreat evaluation and summary report	2 days

Option 1: Location of retreat within the city and people going home at the end of the day

Item	Description	Estimated Amount
1.	Site/location hire for 3 days – Room size for 140 persons and break up rooms	
2.	Lunch and refreshments for 2 days for 140 persons	
3.	Facilitation fees: Facilitator(s) - Include, Materials and overhead - List any other related requirements	