Request for Proposals

Principles for Digital Development – Resources for Donor Organizations
December 19, 2017
**Initiative Background Summary**

The Digital Impact Alliance (DIAL) originated to bring together the public and private sectors to realize an inclusive digital society that connects everyone to life-enhancing and life-enabling technology. DIAL’s role is to convene the community, discover what works and what doesn’t, generate insights to help strengthen ecosystem partners, and advocate best practice recommendations. DIAL is positioned to serve as a neutral broker, bring together government, industry, and other development stakeholders to promote new solutions to old problems.

One of DIAL’s focus areas is **Insights and Impact (I&I)**: DIAL produces, curates, and disseminates evidence-based good practices packaged in easy to understand guidance so that governments, technology companies, the development community, and other implementers can better fund, design, and deploy digital services. DIAL also convenes these groups to shape greater collective impact.

DIAL’s **Insight and Impact (I&I)** focus area has three main initiatives:

1. **Stewardship of the Principles for Digital Development.** DIAL invests in a series of comprehensive, complementary global public goods for the digital development community to increase awareness and adoption of the Principles for Digital Development and maximize
their impact. In this role, DIAL fosters and catalyzes dialog, curates and creates learnings where needed, and facilitates a process by which the Digital Principles can be best shared and strengthened through collective voice and inputs.

2. **Operational How-to Guidance.** DIAL produces operational how-to guidance for digital development practitioners that illustrates step-by-step approaches to implementation, grounded in the experiences and emerging good practices of digital deployments and digital development programs.

3. **Exploratory Research.** DIAL undertakes independent research and support the efforts of other actors in to elevate new insights emerging from the digital development ecosystem.

**Scope of Work**

**Problem statement**

In 2017, the Digital Principles work at DIAL primarily focused on implementing organizations. In 2018, DIAL will focus on donor/funder organizations. DIAL will seek to produce a series of tools, resources, and/or materials that donors can use to institutionalize technology and digital best practices into their work, and educate their organizations internally on the Principles for Digital Development. These materials will be developed based on the needs of donors, and will seek to improve their operating processes and, by extension, the development outcomes of their programs.

DIAL is accepting proposals for two options of work supporting the development of resources for donor organizations. DIAL’s aim is to produce relevant and useful content donor organizations and individuals who are managing digital development investments can use to improve the efficiency and the effectiveness of their programs. Proposals, examples and other references should demonstrate knowledge of and previous collaboration with the donor community and reflect their experiences and needs.

**DIAL anticipates awarding a fixed price, deliverables-based contract.**

**Objective**

The objective of this work is to produce content that is useful, practical and complementary for donor organizations. Specifically, this work seeks to:

- Address gaps in knowledge or practice of donors vis-à-vis achieving their goals in a digital world
- Enhance the internal processes of donor organizations (e.g., procurement processes, internal trainings, evaluation practices) as relate to the use of digital technologies in programmatic work
- Support coordination between donors and implementers/grantees through better understanding of the Digital Principles

The ultimate goal of the supporting materials for the Digital Principles is to improve donors’ programmatic and development outcomes through better understanding and effective use of technology and digital methodologies.
Option Details
This RFP contains two Options: Option A is the completion of Research and Option B is the development and delivery of Tools and Products. **Vendors may respond to both options, or just a single Option based on their experience and expertise.**

Deliverables
The following tables reflect the anticipated deliverables and schedule required for this project. Respondents may suggest amendments as part of their proposals. These deliverables and timetable will be discussed further as part of the negotiation of any resulting contract(s).

**Option A:**
DIAL is seeking an experienced person or firm to conduct landscape research in order to gain a foundational understanding of what current practices in digital development are already being implemented by donor organizations, successes achieved to-date, and where gaps in knowledge or practice may exist. **DIAL has conducted many conversations to-date, and this work build upon information we have already received. In addition, desk research will be necessary, and some in-person interviews. DIAL will coordinate with the vendor on the interview process.**

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<th>#</th>
<th>Deliverable</th>
<th>Description</th>
<th>Timeline</th>
<th>Owner</th>
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<tbody>
<tr>
<td>1</td>
<td>Landscape Assessment &amp; Gap Analysis Findings Report</td>
<td>By reviewing existing practices and internal guidance produced to-date within donor organizations, gain a foundational understanding of what current practices are already being implemented, successes achieved to-date and where gaps may exist. The review should look across multiple donor organizations to compare similar practices, observe where successes have been achieved and identify what challenges still exist. The landscape assessment should also test options for the best approach and delivery format for the products in Option B. The vendor will be responsible for identifying the existing material (in addition to what DIAL can provide).</td>
<td>3 weeks (beginning end of January)</td>
<td>Vendor</td>
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<tr>
<td>2</td>
<td>User Needs and Feedback Collection (Interview Notes)</td>
<td>This work may include 1:1 interviews and group conversations with practitioners including implementers and country government representatives as relevant, to review and react to content, as well as to gain insights from their specific experiences.</td>
<td>Throughout process, as needed</td>
<td>DIAL and Vendor</td>
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Option B
DIAL is seeking an experienced person or firm to develop resources and tools for use by donor organizations, based on the findings of the landscape assessment and gap analysis (Option A). These products will vary in level of complexity, but should address the needs of donor stakeholders as identified. This work will primarily consist of writing content and designing frameworks; however, it will be expected that the vendor selected will test draft versions of these tools at identified workshops and convenings, as well as in one-on-one feedback sessions. Such testing will be coordinated by DIAL, and co-designed and co-facilitated by DIAL and the vendor.

Option B will build upon findings in Option A; current thinking on potential products are based on conversations to-date and tasks stated below are representative of level of effort anticipated for the development of resources and tools.

The tasks outlined below are indicative of desired products communicated by donors to-date, but may be subject to change in nature based on the findings of the landscape assessment report and/or contractor performance. The below tasks serve as a high-level frame of desired products to be developed. The deliverables and timetables will be discussed further as part of any resulting contract(s).

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<tr>
<td>1</td>
<td>Resource Manual</td>
<td>A Digital Principles and digital development “101” guide that will serve as a resource manual to non-technical specialists, including program managers and contracting officers tasked with overseeing and funding digital development programs. Building on existing Digital Principles guidance and donor organization resources, this manual will provide a basic overview of effective use of technology in development programs, including good practices in investment at the local-level. This manual will also provide an overview of the use of digital technology in development programs, as a way to educate generalists at the most basic level. Respondent is encouraged to suggest the best format for delivery of this information. Multiple format options will be tested during the Landscape Assessment.</td>
<td>Draft &amp; Testing: March Draft 2 &amp; Testing: May &amp; June Draft 3: July Final: August / September</td>
<td>Vendor</td>
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<td>2</td>
<td>Desk Resources</td>
<td>Pulling key messages from the Resource Manual, design handouts / visual aids that can be used for easy reference by activity managers, contracting officers and technology managers. These tools would ideally be concise enough to post up at desks.</td>
<td>Draft &amp; Testing: March Draft 2 &amp; Testing: May &amp; June Draft 3: July Final: August / September</td>
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| **3** | **Proposal Evaluation Framework** | Using the guidance from the Resource Manual, develop key questions that activity managers and contracting officers can use to guide their evaluation of proposals that include digital components. This framework / maturity matrix should take into consideration the varying degrees with which the Digital Principles can / should be applied to programs, and not take a “one-size-fits-all” approach to proposal evaluation. Ideally, this tool will help donor organizations better understand how the program will fit into the existing digital ecosystem, and also help them better conceptualize potential outcomes of the program.  
This deliverable will be in digital format. |
| **4** | **User Needs and Feedback Collection (Interview Notes)** | This work may include 1:1 and group conversations with practitioners to review and react to content, as well as to gain insights from their specific experiences.  
As materials begin to be drafted, the vendor should seek feedback from key stakeholders. The vendor will also assist in facilitating user testing workshops and roundtables in partnership with DIAL.  
Throughout process, as needed |
| **5** | **Recommendation for Dissemination and Uptake (Medium TBD)** | In addition to the development of materials themselves, the vendor should make recommendations for how to ensure uptake of these materials from target staff within donor organizations. This may include agendas for in-person training, webinars, on-demand assistance, outreach communications, etc.  
Vendor |
| **6** | **Travel** | The selected vendor will be expected to help facilitate feedback conversations, including roundtables and workshops. It is anticipated that this will require at least 2 international trips (not exceeding one week each, and  
Estimated for May and June |

**Vendor**

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with no more than two vendor team members attending).

DIAL must approve all travel, costs and team members for each trip.

Proposal Submission Requirements
Proposal submissions, which may be created in **Word, PowerPoint or a combination of the two** (and must be type written), must include the following components. Respondents may include additional elements as needed.

- **Proposed approach**
  - Demonstrate understanding of the project objectives
  - Describe approach, methodologies and deliverable formats, as applicable
  - Describe project management approach, including timeline and any recommended updates to timeline provided above, including timing and level of effort on the part of the DIAL team, e.g. to participate in scoping and requirements workshops, iteration junctures, etc.

- **Staff and team structure**
  - Identify the team structure including roles, responsibilities, and level of effort of staff and any sub-contracted resources
  - Provide rationale and background on any sub-contracted firms or individuals
  - Include gender considerations in the formulation of your team

- **Relevant experience**
  - Demonstrate firm and key participants’ experience relative to the scope of work through submission of CVs/resumes
  - Provide at least 3 examples of resources produced for donors and/or similar research
  - Demonstrate experience working with donor organizations (please specify which donors)
  - Demonstrate experience developing knowledge products for digital development practitioners and organizations

- **Budget**
  - Budget should be organized by deliverable with a cost breakdown per deliverable as follows
  - Provide a separate line for professional fees/consultant fees including cost and level of effort per individual
  - Provide separate line item for any sub-contractors
  - Travel will be considered but cost notes must describe relevance of travel to scope of work. Travel expenses should be detailed on separate line and should include number of people travelling, estimated cost of ticket, duration of trip, and/or per diem rates, etc. per identified requirements listed in scope of work section above
  - Cost note explaining assumptions and price any cost support

- **References**
Provide names and email addresses of at least two prior clients willing to discuss their experiences working with you

Submission Format and Timeline

- All submissions are due on Monday, January 15 by 6:00pm EDT. We expect the submissions to clearly state which Option(s) the Respondent is submitting for. The submissions should not exceed 10 pages in length, but will not penalize submissions that are above or below this range.
- Questions from Respondents to DIAL should be submitted no later than January 10, 2018. DIAL aims to respond to all questions by January 11, 2018 in a public document on the DIAL website (http://digitalimpactalliance.org). Questions received after this deadline will be considered at DIAL’s discretion.
- Questions and clarifications from DIAL will be communicated to Respondents between January 15, 2018 and January 18, 2018 with a kind request for prompt turnaround on part of the Respondents.
- The selected Respondents should expect to be notified on/about January 19, 2018 by 6:00pm EDT and should have availability for a kick off meeting the week of January 22, 2018, which can be virtual as needed.
- All proposals should be submitted to RFP@digitalimpactalliance.org with Allana Nelson (anelson@digitalimpactalliance.org) in copy. Respondents should expect a confirmation of receipt within 48 hours, if one is not received please follow up with anelson@digitalimpactalliance.org.

Questions and Answers

Please forward any questions to Allana Nelson at anelson@digitalimpactalliance.org with a copy to RFP@digitalimpactalliance.org by January 10, 2018. DIAL will make every effort to respond to questions within 24 hours, and will share the questions and answers from these bilateral discussions with other Respondents through a public document on the DIAL website.

Evaluation Process

DIAL will review all written proposals, and may request a phone or in-person interview and/or updated submission to address questions or provide clarification. The evaluation committee will use the following criteria to evaluate candidates’ response.

The selection decision will be based on the following criteria:

<table>
<thead>
<tr>
<th>Criteria</th>
<th>Score (1-5)</th>
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<tbody>
<tr>
<td>1. Approach</td>
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<tr>
<td>The analytical framework and methodology is capable of answering the project’s key questions and deliverables</td>
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<td>2. Subject Matter Expertise</td>
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### Criteria

<table>
<thead>
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<tr>
<td>Solid understanding of the key dynamics and trends in the relevant substantive areas</td>
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<tr>
<td>Appropriate level of understanding of the key stakeholders and dynamics within the ecosystem</td>
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<td>Key participants can speak with authority and credibility on the key project issues</td>
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<td>Experience working with emerging markets and the field of global development</td>
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### 3. Project Management

- Demonstrated understanding of their proposed scope of work, including overall project structure and how their scope of work relates to other consultants
- Achievable action plan that will deliver the project on time and on budget
- Effective staffing and/or team structure (including gender considerations)
- Thoughtful risk identification and mitigation strategies

### 4. Capabilities and Experience

- Demonstrated firm experience with similar projects and experience working with donor organizations
- Team members with demonstrated skills and experience with similar projects and activities
- High-quality sub-contractors and external advisors, if proposed
- Preference for in-market and/or women-owned or led businesses
- Development and Emerging Market Experience
- Experience working with emerging markets and the field of global development

### 5. Value

- The proposed pricing includes only costs necessary and allocable to the work described in this RFP
- Cost reasonableness, including demonstration of researched costs

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**Intent and disclaimer**

This RFP is made with the intent to identify a consultant to deliver results as described in this RFP. Issuance of this RFP does not obligate DIAL to award a resulting contract and any costs incurred in preparation of a proposal is the sole responsibility of the respondent.

In submitting a proposal, the respondent certifies that information contained therein is truthful and accurate to the best of the respondent’s ability. Should any information later be found to not be in-line with this certification, DIAL reserves the right to terminate any resulting contract(s) and/or select an alternative contractor. DIAL assumes it can be confident in Consultant’s ability to deliver the product(s) and/or service(s) proposed in response to this RFP.

If DIAL amends the RFP, copies of any such amendments will be sent to all Respondents.
Contract terms
The UN Foundation will negotiate contract terms upon selection. A copy of the contract terms and conditions will be provided upon pre-selection. All contracts are subject to review by UN Foundation’s Business Services Budget Reporting (BSBR) team. Once a draft contract is reviewed by BSBR, DIAL’s Program Administrator will contact the Consultant. The project will start upon the execution of the contract. The contract will outline terms and conditions, scope, budget, and applicable flow-down terms prescribed by the funding partners USAID, the Bill and Melinda Gates Foundation, SIDA, and the UN Foundation.

Release
Consultant understands that DIAL has chosen to solicit an RFP for consulting services, and that Consultant’s response does not guarantee that DIAL will enter into a new contract with Consultant or continue any current contract(s) with Consultant. Consultant agrees that DIAL may, in its sole discretion:
• Amend or cancel the RFP, in whole or in part, at any time
• Extend the deadline for submitting responses
• Determine whether a response does or does not substantially comply with the requirements of the RFP
• Waive any minor irregularity, informality or nonconformance with the provisions or procedures of the RFP
• Negotiate with all consultants UNF deems acceptable
• Issue multiple awards
• Copy the responses

This RFP is not an offer to contract. DIAL assumes no responsibility for Consultant’s cost to respond to this RFP. All responses become the property of DIAL.

The Consultant, by submitting a response to this RFP, waives all right to protest or seek any legal remedies whatsoever regarding any aspect of this RFP.

Consultant represents that it has responded to the RFP with complete honesty and accuracy. If facts provided in Consultant’s response change, Consultant agrees to supplement its response in writing with any deletions, additions, or changes within ten (10) days of the changes. Consultant will do this, as necessary, throughout the selection process. Consultant understands that any material misrepresentation, including omissions, may disqualify it from consideration for a contract award.

Consultant understands it may receive proprietary and confidential information from DIAL during the RFP process (“Confidential Information”). Consultant agrees to not use Confidential Information for any purpose other than its participation in the RFP process and to not reveal Confidential Information directly or indirectly to any other person, entity, or organization without the prior written consent of DIAL. Consultant further agrees to exercise all reasonable precautions to maintain the proprietary and confidential nature of Confidential Information where it can best demonstrate its value and capacity to delivery ecosystem-wide, meaningful value.
Intellectual Property (IP) considerations
DIAL’s mission is to create public goods that enable a more efficient digital economy for everyone’s common benefit. To serve this goal in partnership with other organizations and individuals, DIAL funds the development of important hardware and software, databases, computer protocols, research and useful industry standards.

Intellectual property (“IP”) is at the heart of all things creative and inventive. DIAL’s IP policy is shaped by our key funders’ (i.e., the Bill and Melinda Gates Foundation (BMGF), United States Agency for International Development (USAID) and the Swedish International Development Cooperation Agency (Sida) policies. DIAL’s work products thus must comply with BMGF’s “Open Access” policy. Further, any IP DIAL funds should be licensed for free use worldwide. This is accomplished through open source and Creative Commons licensing and by open standards, unencumbered by restrictive copyrights and patents.

The scope of work for this project and deliverables will, as such, abide by DIAL’s intellectual property (IP) policy and its donor’ compliance requirements. If special considerations are required, DIAL will negotiate those on a case by case basis with selected vendors.

As required by its donors, DIAL is committed to “Global Access”. As such, DIAL will ensure that knowledge and information gained from any project and any deliverable produced will be promptly and broadly disseminated under a creative commons license, and any funded developments will be made available at an affordable price to:

a. People most in need within developing countries and /or
b. In support of the U.S. educational system and public libraries, as applicable

DIAL will take into consideration consultants’ intellectual property issues as part of the selection process.