

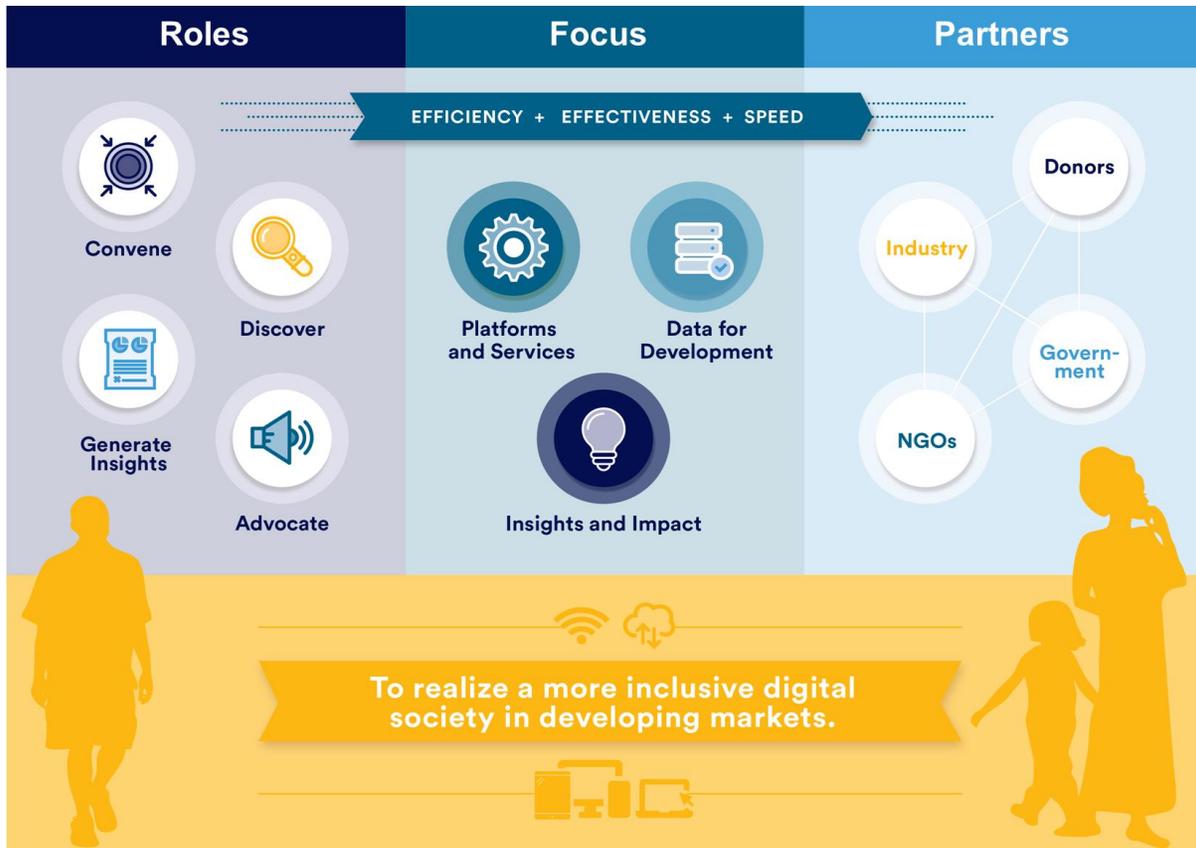
Request for Proposals

Principles for Digital Development – Landscape and Needs Assessment
February 13, 2019



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 supports the efforts of other actors in to elevate new insights emerging from the digital development ecosystem.

Scope of Work

Purpose of Work

As steward for the Principles for Digital Development, DIAL is charged with facilitating dialogue amongst the digital development community, curating the exchange of new ideas and resources, and promoting adoption and new endorsement of the Digital Principles. In this role, DIAL seeks to foster community engagement and interaction; provide practical, relevant how-to guidance and resources for digital development practitioners, including implementing organizations (international and humanitarian NGOs), donors, and country governments; and increase awareness about the Digital Principles themselves. DIAL's aim is to produce relevant and useful content organizations and individuals who are implementing digital development programs can use to improve the efficiency and the effectiveness of their programs.

To address this, DIAL seeks to produce a needs gathering and research report to understand the greatest needs/gaps around the use of the Digital Principles that will inform the future development of a Digital Principles training series for stakeholders. This report will study trends within the digital development community's current understanding and needs around the Digital Principles and will provide recommendations for how DIAL can improve Digital Principles training, consultation, etc. and recommendations for the best method of delivery.

DIAL is accepting proposals for a final needs assessment report that will include elements of study, interviews, and possibly a survey of Digital Principles stakeholders. The report will provide potential models of delivery, including strengths and weaknesses, and include recommended next steps and a recommended delivery model of trainings that can be replicated and delivered in the field. The report will also include on what ecosystem-level understanding of the Digital Principles currently exists. Final deliverables will also include all raw interview data the vendors collect. Proposals, examples and other references should demonstrate knowledge of, and previous collaboration with, the international development ICT4D community and Human Centered Design approach to development.

DIAL anticipates awarding a fixed price, deliverables-based contract. Proposal pricing should be in a budget format with a realistic pricing of proposed deliverables and cost elements explained. The contract is anticipated to run from March 2019 to June 2019.

Objective

The objective of this work is to study/interview/survey Digital Principles users and stakeholders and their perspective on the following questions (though these are only representative and consummate). DIAL and the vendor will hold weekly check-ins to go over updates according to the outline of typical phasing of projects:

Phase 1: Kick off Meeting and Introducing the Digital Principles

- Initial consultation with DIAL and Digital Principles team members
- Form a representative partner advisory group (considering geographies, context, gender, etc.)
- Understand the context where Digital Principles are being implemented
- 1:1 Interviews, surveys, field visit, etc.
- Create user personas
- Refine problem statements
- Develop and validate user scenarios

The work should include contextual description of ecosystem of where the Digital Principles are being used, detailed user personas, and specific problem statements that should be an area of focus for DIAL. Through an advisory group, the vendor will validate user personas and scenarios. The review should observe where successes have been achieved and identify what challenges still exist.

This work may include 1:1 interviews and group conversations with practitioners or stakeholders to review and react to content of research, test assumptions, and gain new insights from their specific experiences. This can include stakeholders who have received or been given Digital Principles trainings or presentations, or those who are unfamiliar with the Digital Principles. The purpose is to gain insights from their specific experiences.

- Vendor should provide DIAL with planned interview questions and a final list of interviewees for review and approval
- DIAL will connect Consultant with existing contacts, but Consultant will be expected to draw on their own relationships with donor organization representatives to increase interview pool. DIAL should be kept informed of all conversations and interviews taking place
- No less than 50 stakeholders or relevant individuals will be interviewed, with a consideration toward a mix of gender, geography, sector, etc.

Phase 2: Ideate and Prototype

- Conduct ideation workshops with selected users
- Develop simple prototypes of proposed solutions
- Validate prototypes

The types of questions we are seeking to answer are as follows. This list is not exhaustive and part of the kick off meeting will be discussing and agreeing on specific questions.

- What materials and trainings are stakeholders currently using for the Digital Principles?
- Do any trainings exist that are particularly useful and that we can use or replicate for future content development?
- What specifically should be included in a Digital Principles training series?

- What are the greatest needs/gaps around the use of the Digital Principles that future courses can address?
- What are the trends we are aware of and that we should address?
- How can DIAL improve the capacity to use technology by stakeholders through such a training?
- What is the best method of delivery for stakeholders and their teams (i.e. full online courses? In-seat courses? A blend?)
- What value do stakeholders see in Digital Principles curriculum (i.e. would a trainee be viewed as more of an “Expert” after taking the training than before?)

The Phase 2 report should include:

Creation of draft and final reports that captures: synthesis of ideation workshops, validated simple prototypes.

Through Phase 2 activities the vendor will conduct ideation workshops that will capture best practices in supporting the knowledge and adoption of the Digital Principles. The vendor will develop simple prototype of solutions and validate these with the Advisory Group.

- Report should include different levels of research in deliverable table timeline.
- The final report should be approximately 25 pages, but should not exceed 100 pages (including annexes).

The vendor will also provide the final collection of interview notes, feedback collection/user needs.

Specifically, this work seeks to produce:

- An insights report that includes a representative user advisory group strategy, outlines validated user scenarios, and refined problem statements.
- Ideation workshops with a synthesis report.
- A final report that helps inform how the Digital Principles will move forward with content development, with validated simple prototypes capturing all of the above, and all raw interview data that vendors collect.

The ultimate goal of the report is to produce research-driven insights on what stakeholders want to see in Digital Principles trainings, and the most useful method in which these trainings are delivered, particularly to those working at field-level. We would like to see what types of Digital Principles trainings currently exist and how we can integrate them into our curriculum. The report should provide potential models of delivery, including their strengths and weaknesses, as well as a recommendation for which model of delivery can be replicated and delivered in the field. The report will also include on what ecosystem-level understanding of the Digital Principles currently exists. DIAL seeks to address stakeholders’ knowledge and training needs and inform how DIAL should move forward with its training and content development.

Deliverables

DIAL is seeking an experienced person or firm to develop the following products for DIAL to use in considering future Digital Principles content and training development.

The following table reflects the anticipated deliverables and tentative schedule required for this project (the timeline may be adjusted in the final contract). DIAL believes that these are the most important/critical deliverables to achieve the objectives of this work. Respondents may suggest amendments as part of their proposals and are encouraged to consider what deliverables they believe are most important, when and how they would develop them, even if they are beyond this list. These deliverables and timetable will be discussed further as part of the negotiation of any resulting contract(s). In addition to the deliverables outlined, attendance at regular check in meetings will be expected and plans for content may be requested in advance of the deliverable.

#	Deliverable	Report Must Include	Estimated Timeframe
1	Phase 1	<ul style="list-style-type: none"> Notes from initial consultation with DIAL/Principles team Draft of interview questions and interviewee list; no less than 50 interviewees Draft of report outline 	<p>Meeting with DIAL/Principles team: week of March 25, 2019</p> <p>Draft of interview questions/interviewee list: Mid-April 2019</p> <p>Draft Outline: Early May</p>
2	Phase 2: Ideate and Prototype	<ul style="list-style-type: none"> Initial Draft (Draft 1) Draft 2 Draft 3 <u>Final and feedback/interview collection notes</u> 	<p>Draft 1: Mid May</p> <p>Draft 2: Late May</p> <p>Draft 3: Early June</p> <p>Final report and feedback/interview notes: Early-mid June</p>

Proposal Submission Requirements

Proposal submissions, which may be created in **Word, PowerPoint or a combination of the two** (and must be type written, preferably no longer than 10 pages, no specific fonts or formats are required), 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
 - **Specifically, please highlight your team's experience with human-centered design and interviewing development practitioners**
 - Provide at least 3 examples of resources produced and/or similar research
 - Demonstrate experience working with donor organizations (please specify which donors)
 - Demonstrate experience analyzing 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 **March 4, 2019** by **11:59pm EST**. The submissions should not exceed **10 pages** in length, but DIAL will not penalize submissions that are above or below this range.
- Questions from Respondents to DIAL should be submitted no later than **February 22, 2019** by **6:00pm EST**. DIAL aims to respond to all questions by **February 24, 2019** 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 **March 7, 2019 and March 9, 2019** with a kind request for prompt turnaround on part of the Respondents.

- The selected Respondents should expect to be notified on/about **Friday, March 22, 2019** by 6:00pm EST and **should have availability for a kick off meeting the week of March 25, 2019**, which can be virtual as needed.
- All proposals should be submitted to RFP@digitalimpactalliance.org with Claudine Lim (clim@digitalimpactalliance.org) in copy. Respondents should expect a confirmation of receipt within 48 hours, if one is not received please follow up with clim@digitalimpactalliance.org.

Questions and Answers

Please send questions to Claudine Lim at clim@digitalimpactalliance.org with a copy to RFP@digitalimpactalliance.org by **February 22, 2019** at 6:00pm EST. 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:

Criteria	Score (1-5)
1. Approach	
The analytical framework and methodology is capable of answering the project's key questions and deliverables	
2. Subject Matter Expertise	
Solid understanding of the key dynamics and trends in the relevant substantive areas	
Appropriate level of understanding of the key stakeholders and dynamics within the ecosystem	
Key participants can speak with authority and credibility on the key project issues	
Experience working with emerging markets and the field of global development	
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	

Criteria	Score (1-5)
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	
Gender balance on team	
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	

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.

DIAL is partially funded by SIDA with a commitment to women and non-US owned organizations, DIAL will consider all proposals in consideration of the selection criteria but will give preference to women and non- US owned businesses.

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 proscribed 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.