

# Request for Proposals

Qualitative Data Organization, Analysis, and Sensemaking  
Services for the Digital Impact Alliance (DIAL)  
February 28, 2020



## Summary

The United Nations Foundation's Digital Impact Alliance (DIAL) is accepting proposals to provide qualitative data organization, analysis, and sensemaking on behalf of DIAL's Monitoring, Evaluation, and Learning team. The vendor will:

- (1) review the current qualitative data from two evaluations and multiple internal learning exercises and recommend a low-cost and user-friendly solution to organize current and future data (data management system).
- (2) organize and code the data in the new system, perform basic pattern analysis with guidance from the MEL team, and provide recommendations for how to add and organize new qualitative data.
- (3) Provide training to DIAL MEL staff on the use of the data management system.

There will be no data collection required during this consultancy, the vendor will only be using previously collected qualitative data.

The goal is for this qualitative data system to be readily accessible to the DIAL MEL team to provide compelling quotes and anecdotes at the request of our Communications and Strategy teams, as well as to be able to query the system to be able to identify larger patterns or answer specific research questions.

## Background of Organization

The Digital Impact Alliance (DIAL) brings the public and private sectors together to realize an inclusive digital society that connects everyone to life-enhancing and life-enabling technology. DIAL is staffed by a global team of technology researchers, developers, investors, negotiators and policymakers. It is supported by foundations and development agencies and guided by a board of leading emerging market entrepreneurs, technologists and development experts. With this leadership, DIAL is uniquely positioned to serve as a neutral broker, bringing together government, industry and other development stakeholders to promote new solutions to old problems. For more information, visit [www.digitalimpactalliance.org](http://www.digitalimpactalliance.org).

## Objective

The primary objective of this activity is to allow DIAL to better use the research and evaluation findings that we collect as part of our routine monitoring, evaluation, and learning exercises in our Strategic and Communications decisions. A secondary objective is to be better able to describe our impact across time and customer perspectives.

The qualitative data management system will integrate qualitative data collected during two evaluations, our [Baseline Study](#) from 2018 and Midline Study from 2019 (report under development). The qualitative data for both evaluations were gathered using SurveyMonkey and phone interviews and were coded in Excel (baseline) and Dedoose (midline). Additionally, the system will include qualitative data that the MEL team collects during quarterly learning reviews with each of our nine programs. This data currently sits in multiple Word documents. The qualitative data at a minimum would need to be coded by data source, speaker (DIAL vs non-DIAL), program referenced, and other categorical descriptors, which DIAL will provide.

To be effective, the DIAL qualitative data management system must:

- Be easy to navigate
- Does not require coding (Python, R, etc.) capabilities to perform basic functions such as querying or coding data.

- Allow for new data and queries to be added
- Allow for multiple levels of parent-child and parallel coding systems
- Integrate with existing DIAL tech stack (Microsoft Office 365 suite)
- Allow easy export of complete data sets and sorted data
- Allow for viewing vs editing permissions
- Include data protection elements
- Ideally, allow for data visualization elements (not required)
- Ideally, integrate machine learning to identify patterns (not required)
- Ideally, built using an open source system (not required)

A vendor that can work well independently is required. DIAL and vendor will establish a set of practices and guidelines during kick-off to ensure a timely schedule for final project completion. Engagement and meetings between the vendor and DIAL will be led by the Director of MEL at DIAL. The site must include a solution that allows in-house staff to easily update and modify data and queries after the launch. Upon completion, DIAL will maintain control of the content and publishing of new information on the system.

## Audience

The primary users will be the DIAL MEL team, with likely view permissions allocated to DIAL Communications, Policy, Strategy and Partnerships team (minimum 3 and maximum 10 individual licenses).

## Timeline

Delivery Date	Deliverable
March 18, 2020	Proposals due
March 20, 2020	Vendor selected and notified via email
March 26, 2020	Kickoff meeting with selected vendor
March 27-April 20, 2020	Work underway to develop qualitative data management system
April 23, 2020	Qualitative data management system is live and MEL staff trained
April 30, 2020	Sensemaking Report due

## Budget

The budget ceiling for this work is \$60,000. Based on the scope of work and proposed timeline, and previous company experience with similar projects, please include a proposed budget for the completion of this project.

## Scope of Work

### 1. Qualitative data management system user needs identification and software recommendation

- In consultation with the DIAL staff, the vendor will review in great detail, the type and quantity of qualitative data that DIAL collects and recommend a new data management system to allow the MEL team to access this data.
- DIAL and vendor will establish a set of user needs for a qualitative data management system. The vendor will then recommend an appropriate qualitative data management system. This system can either be an off-the-shelf solution, open source, or built on an existing DIAL software solution.
- The system should have the following features:
  - Easy to navigate
  - Does not require coding (Python, R, etc.) capabilities to perform basic functions such as querying or coding data.
  - Allow for new data and queries to be added
  - Allow for multiple levels of parent-child and parallel coding systems
  - Integrate with existing DIAL tech stack (Microsoft Office 365 suite)
  - Allow easy export of complete data sets and sorted data
  - Allow for viewing vs editing permissions
  - Include data protection elements
  - Ideally, allow for data visualization elements (not required)
  - Ideally, integrate machine learning to identify patterns (not required)
  - Ideally, built using an open source system (not required)
- The vendor will present options to the DIAL team. The Director of MEL will ultimately decide which option to purchase and/or install.

### 2. Qualitative data management system installation and data integration

- Depending on which option is chosen, the vendor will either build the solution on the current DIAL tech stack (Microsoft Office 365) or support installation and set up of off-the-shelf or open source solution. DIAL will handle the payment of any off-the shelf solution.
- Vendor will tailor the system to match DIAL user needs and develop a code book to ease integration of qualitative data.
- Vendor will upload existing qualitative data from two evaluations and multiple learning exercises and ensure that data points are properly coded according to code book. This will include:
  - 8 different surveys, each with an average of 25 responses.
  - 40 interview transcripts
  - Anecdotes from 50 learning sessions

### 3. Additional Features and Data Analysis:

Once the full datasets are uploaded with basic coding:

- Vendor will set up queries to perform basic pattern analysis and respond to specific questions, with guidance from DIAL MEL team. Vendor will propose and conduct additional coding as necessary to answer these questions and to support pattern analysis.
- Depending on the capabilities of the selected software, vendor will set up data visualization and machine learning capabilities.
- Vendor will set different levels of user permissions, allowing for editing vs view only options.
- Vendor will bug test the system to ensure that all features are functional.

#### 4. Train DIAL staff and transition out

- Vendor will conduct a one hour training with DIAL MEL staff to ensure that staff is capable of accessing the system, importing and exporting data from the system, adding and deleting new users, etc.
- Vendor will ensure that all intellectual property is archived on DIAL systems.
- Vendor will provide any final recommendations for how the system can be further optimized, considering additional data that DIAL collects.

#### 5. Sensemaking report

Using data analysis from Section 3, the vendor will develop a short report (about 5-6 pages) summarizing the data and pulling out any key trends. The Director of MEL will provide an outline.

## Project Period of Performance

Work will start **March 26, 2020** and we're requesting that it be completed by **April 30, 2020**. During this time, we anticipate a close working relationship with the chosen vendor.

### Proposal submission requirements

Proposal submissions must be created in Microsoft Word in 12-pointfont. Submissions should not exceed 7 pages with up to 20 pages for Annexes. Proposal submissions must include the following components. (Respondents may include additional elements as needed.)

- Proposed approach
  - Demonstrate understanding of the project objectives.
  - Describe approach and methodologies, as applicable.
  - Describe project management approach, including a 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. DIAL prefers a single point of contact who manages the deliverables. DIAL anticipates that this work will be done by a single individual but will make allowances for a division in work between software identification/set up and qualitative data coding and analysis.
  - Provide rationale and background on any sub-contracted firms or individuals.
  - Sub-contractors must be identified and the work they will perform must be defined. DIAL will not refuse a proposal based upon the use of subcontractors; however, we reserve the right to refuse the sub-contractors you have selected.
  - If the team is not located in within 5 hours of Washington, DC time zone,

provide an explanation of how the team will be available to DIAL during normal business hours.

- Relevant experience
  - A description of capabilities and success in setting up and using qualitative data management systems.
  - A description of capabilities and success in organizing and analyzing qualitative data.
  - Provide at least two examples of qualitative data analysis your firm has produced that best reflect your work and relevancy to this project. Briefly list the role(s) your firm played in each project. Using dummy data is acceptable.
  
- Budget
  - Provide a detailed budget, including assumptions and costs and level of effort for staff and any sub-contractors.
  - Provide professional fees budget, including cost and level of effort per staff member
  - Provide separate line item for any sub-contractors.
  - Provide expenses budget by type of expenses, e.g. travel, research, etc. Travel estimates should indicate the anticipated destination and duration of each trip.
  - The price you quote should be inclusive. If your process excludes certain fees or charges, you must provide a detailed list of excluded fees with a complete explanation of the nature of those fees.
  
- 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 must be delivered electronically with the subject line “Digital Impact Alliance (DIAL) Qualitative Data Management System – Company Name.
- All submissions are due on **March 18, 2020 by 5:00PM ET.**
- The selected respondent will be notified on March 20<sup>th</sup> by 5:00pm ET
- Please send all proposals and questions to [mel@digitalimpactalliance.org](mailto:mel@digitalimpactalliance.org)

## Evaluation Process

Criteria	Score (1-5)
<b>1. Approach</b>	
The analytical framework and methodology that is capable of answering the project’s key questions and deliverables	
<b>2. Subject Matter Expertise</b>	
Solid understanding of different qualitative data management systems	
Solid understanding of different qualitative data analysis methods and software	

Experience working with qualitative data projects that combine multiple sources	
<b>3. Project Management</b>	
Demonstrated understanding of their proposed scope of work, including overall project structure and how their scope of work relates to other vendors	
Achievable action plan that will deliver the project on time and on budget	
Effective staffing and/or team structure	
Thoughtful risk identification and mitigation strategies	
Ability of proposed solution to be extendable and a platform to build on over the long term	
<b>4. Capabilities and Experience</b>	
Demonstrated firm experience with similar projects	
Team members with demonstrated skills and experience with similar projects and activities	
High-quality sub-contractors and external advisors, if relevant	
Appropriate access to resources and knowledge centers	
Preference for in market and / or women-owned or led businesses	
<b>5. Value</b>	
The proposed pricing is within budget	
The proposed pricing demonstrates a competitive price and good value for the money	

## Intent and Disclaimer

This RFP is made with the intent to identify a Vendor to deliver results as described in this RFP. DIAL will rely on Vendor's representations to be truthful and as described. DIAL assumes it can be confident in Vendor'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 to the proposal.

## Contract Terms

DIAL will negotiate contract terms upon selection. A copy of the contract terms and conditions will be provided upon selection. All contracts are subject to review by the UN Foundation's Business Services and Contracts team. Once a draft contract is reviewed by the Business Services and Contracts team, DIAL's Grants Manager will contact the Vendor. The project will start upon the execution of the contract. The contract will outline terms and conditions, scope, budget, and applicable flow-down terms.

## Release

Vendor understands that DIAL has chosen to solicit an RFP for consulting services, and that Vendor's response does not guarantee that DIAL will enter into a new contract with Vendor or continue any current contract(s) with Vendor.

Vendor 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 Vendors UNF deems acceptable
- Issue multiple awards
- Photocopy the responses for evaluation/review

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

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

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

Vendor understands it may receive proprietary and confidential information from DIAL during the RFP process (“Confidential Information”). Vendor 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. Vendor 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

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.

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