

Request for Proposals

(Social) Return on Investment Methodologies Toolkit

February 21, 2020



Introduction

This document summarizes the requirements for a proposed consultancy to develop a (Social) Return on Investment (S)ROI Methodologies Toolkit for forecasting and evaluating Information and Communications Technologies for Development (ICT4D) investments, particularly for digitally enabled service provision in low-income countries. It is expected that the selected applicant will, in consultation with the DIAL team, conduct a landscape review of existing and potential (S)ROI methodologies for evaluating digital tools, services and interventions; identifying the most appropriate approaches for specific use cases; and developing an accessible toolkit to support greater understanding of potential applications and uses of (S)ROI methodologies in this field.

This work will draw on current and experimental approaches to measuring the return on investment (ROI), and/or social return on investment ((S)ROI). Preliminary analysis by DIAL found that (S)ROI is rarely part of the methodology used to evaluate ICT4D investments and projects. This may have a number of causes, including financial implications (i.e. too costly to conduct (S)ROI or cost-benefit analysis (CBA); perceived value of conducting (S)ROI; limited tools and awareness of existing methodologies; limited community of practice; or the scarcity of disaggregated cost information. Nonetheless, demand for this capability from donors, implementers and governments remains high.

DIAL Background Summary

Digital technology is having a profound impact on society, enhancing our ability to solve longstanding global development challenges. Creating an inclusive digital society would ease our ability to communicate with everyone and allow new opportunities for innovative services to flourish.

For the most vulnerable though, the digital divide exists and is growing. Persistent challenges that slow awareness and adoption of digital technology and services in the developing world include the limited reach of technical infrastructure and software maturity, the misalignment of financial incentives, uncertain policy environments, and scarce technical capacity. These factors impede the scale and speed of delivering digital services to millions of people, preventing them from realizing the full potential of better health, education, and economic opportunities. This imbalance must change. **When we achieve a digital society that serves everyone, we have the potential to improve the lives of millions of people around the world.**

The Digital Impact Alliance (DIAL) was formed to bring the public and private sectors together to help realize an inclusive digital society that could connect everyone to life-enhancing and life-enabling technology. DIAL is staffed by a global team of technology researchers, developers, investors, and policymakers. It is supported by world-class 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 in this ecosystem, bringing together government, industry, and other development stakeholders to discover and promote new solutions to old problems.

Scope of Work

The purpose of this consultancy is to develop an (S)ROI Methodology Toolkit for forecasting and evaluating Information and Communications Technologies for Development (ICT4D) investments, particularly for digitally enabled service provision in low-income countries. This could be product and project specific investment or larger investments.

This project will build on DIAL's preliminary landscaping work to develop a comprehensive assessment of available methodologies and related guidance and develop an easy-to-use toolkit covering specific methodologies appropriate to several assessment use cases. This resource will explain the purpose and application of (S)ROI methodologies, set out their value and effectiveness, and provide theoretical models that implementers can use to help them in advocating for, assessing, and evaluating investment decisions or the impact of existing ICT4D projects. This toolkit will take a holistic approach to reviewing existing methodologies to include those that look at both financial and other (e.g. social) returns on digital investments. Expected users of the toolkit will include non-profit implementers and donors, but an explicit focus will be on the use of digital technologies for service provision in low-income countries.

We expect the work to entail the following key components:

- 1) Inception report:** consulting with the DIAL team, develop an inception report that sets out intended approach, timelines including review periods and personnel implicated, acceptance criteria for deliverables, and considerations for the project. Approval of this deliverable is required before proceeding with the rest of the project.
- 2) Landscape review - report: Review of the state of the field and available methodologies:** Build on DIAL's preliminary landscaping work to develop a comprehensive assessment and report (max 20 pages) of available (S)ROI techniques and methodologies used with ICT4D investments.

This will include description of each methodology and technique, factors and elements included in related calculations, type of evaluation (retrospective vs. prospective, or both), limitations, case examples, and related guidance. This section will also include reference and links to related tools and additional resources for each technique highlighted. Examples of methodologies include (S)ROI methodologies, Cost-Benefit Analysis (CBA), econometric analysis, Impact Multiple of Money (by Rise Fund and Bridgespan Group), Practical Impact methodology (by Global Innovation Fund), Omidyar Network Impact Analysis Framework, to name but a few.

This step will include review of multilateral publications, private sector and non-profit impact evaluations, academic journals and other relevant publications. This step will also involve communications with relevant institutions whose resources and tools are featured to ensure appropriate references.

- 3) **Draft Toolkit content:** The consultant (or consulting firm) will provide the content and early design thinking (in consultation with the DIAL team) for an accessible toolkit which will provide a high-level understanding of (S)ROI approaches and their application, provide case studies, and set out appropriate methodologies that could be used for the assessment (in advance) and evaluation (in retrospect) of ICT4D, and for advocacy of ICT4D approaches, along with an overview of their relative strengths and limitations. (Note: design and delivery of the final toolkit is expected to be undertaken in a separate design engagement by another consultant or firm, but consultants with relevant design skills and experience are encouraged to highlight them.)
- 4) **Slide deck presentation and Final Toolkit:** The consultant or consulting firm will submit final toolkit content and develop a slide deck presentation to the team highlighting key findings from the literature review, an overview of the toolkit, and how the toolkit is meant to be used.

Deliverables and Timeline

#	Deliverable	Illustrative timeframe
1.	Inception Report	2 Weeks
2.	Landscape review report	3 Weeks
3.	Draft Toolkit content	4 Weeks
4.	Final Deck Presentation and Toolkit	2 Weeks

This work will be delivered over about three (3) months between March and June 2020 and consultants are expected to work closely with DIAL and have regular/weekly check-ins. Start date will be contingent upon final contracting and availability.

The consultant(s) will work in close coordination with DIAL’s Manager, Insights & Impact, as well as the Communications team and senior leadership, to develop and approve deliverables on a payment by deliverables basis.

Performance Measurement. Successful completion of deliverables of this project is dependent upon the following criteria:

- a) Each deliverable has approval from relevant DIAL staff and will include a period of review and sign-off to indicate satisfaction with the work.
- b) Quality of the work (preliminary research and final toolkit) should meet or exceed industry research and technical standards, and is determined to be credible by our peers, and publishable within the sector. More detailed acceptance criteria will be developed in consultation with DIAL in the inception phase and set out in the inception report.
- c) Final negotiated schedule is adhered to with a window of variance not to exceed four (2) weeks total.

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, 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, United States Agency for International Development (USAID), the Swedish International Development Cooperation Agency (Sida), and Department for International Development (DFID)) policies. DIAL's work products thus must comply with BMGF's "Open Access" policy. Further, any IP we fund 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, we will consider 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

Proposal submission requirements

Proposal submissions, which may be created in Word, PowerPoint, or a combination of the two, 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 timeline and any recommended updates to timeline provided above, including level of effort on the part of the DIAL team, e.g. to participate in scoping and requirements workshops, iteration junctures, etc.
- **Subject Matter Expertise**
 - Staff and team structure
 - Identify the team structure, including roles, responsibilities, and level of effort of staff and any sub-contracted resources (note that partnerships or sub-contracting is acceptable)

- Provide rationale and background on any sub-contracted firms or individuals
 - Relevant experience
 - Demonstrate firm(s) and key participants’ experience relative to the scope of work (including partners/subcontractors)
 - Provide at least 2 examples of similar or related work
- **Value**
 - Provide a fee schedule by deliverable.
- **References**
 - Provide names and email addresses of at least two prior clients willing to discuss their experiences working with you.

Submission Format

- All submissions must be delivered electronically with the subject line “**Digital Impact Alliance (S)ROI Methodologies Toolkit – Company Name**”.
- All submissions are due on March 20, 2020 by 5:00 pm US - Eastern Standard Time (EST). We expect the submissions to be in the 8-12-page range but will not penalize submissions that are above or below this range.
- The selected respondents will be notified by April 3, 2020 by 5:00 pm EST.
- Please send all EOIs and email submissions to msayinzoga@digitalimpactalliance.org
- In case respondents encounter a problem submitting, please contact Maurice Sayinzoga at msayinzoga@digitalimpactalliance.org

Timeline

RFP released	February 21, 2020
Deadline for offerors to indicate interest	March 3, 2020 by 5 pm (EST)
Call scheduled with interested offers for questions and clarifications	March 4, 2020 (tentative – date/time to confirmed and Zoom call link will be shared via email)
Proposals due	March 20, 2020
Vendor selected and notified via email	By April 3, 2020

Questions and Answers

Please forward any questions to msayinzoga@digitalimpactalliance.org. DIAL will make every effort to respond to questions within 24 hours and may choose to share the questions and answers from these bilateral discussions with other Respondents.

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. Approach (10 points)	
The proposed approach shows an understanding of the objectives and a clear plan for achieving them.	
2. Subject Matter Expertise (35 points)	
Demonstrated understanding of (S)ROI methodologies and techniques of measuring benefits and costs of investments in general, and tech investments in particular.	
Experience designing and developing effective content tool kits.	
Experience with advanced data collection, analysis, and visualization tools.	
3. Project Management (10 points)	
Demonstrated understanding of proposed scope of work	
Achievable action plan that will deliver the project on time and on budget	
Thoughtful risk identification and mitigation strategies	
4. Capabilities and Experience (25 points)	
Demonstrated firm or consultant's experience with similar projects and in international development context	
Team members with demonstrated skills and experience with similar projects and activities	
High-quality sub-contractors and external advisors, if relevant, especially with knowledge and experience in global south/developing countries	
Appropriate access to resources and knowledge centers	
5. Value (20 points)	
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 consultant to deliver results as described in this RFP. DIAL will rely on Consultant's representations to be truthful and as described. 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

DIAL will negotiate contract terms upon selection. A copy of the contract terms and conditions will be provided to finalists. 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 Grants Manager 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.

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.