

Request for Proposals

Principles for Digital Development – Instructional Design for Training Courses
October 6, 2020



About DIAL

The Digital Impact Alliance (DIAL) is a “think, do, replicate” tank that investigates digital transformation best practice at the national, regional and global level. We combine practical research with evidence-based advocacy to identify which digital efforts work, package them as re-usable solutions and encourage their use.

Stewardship of the Principles for Digital Development. As part of DIAL’s mandate, we steward the Principles for Digital Development (Digital Principles). The Digital Principles are a set of nine guidelines meant to help digital development practitioners better integrate digital tools and technology in their projects and programs. As steward, DIAL encourages community conversations about digital development; curates new ideas and resources for digital development practitioners, including implementing organizations (international and humanitarian NGOs), donors, and country governments, and promotes awareness, endorsement and adoption of the Digital Principles.

Project Description

As steward for the Principles for Digital Development (Digital Principles), 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.

In 2019, DIAL partnered with researchers and training experts to undertake [a global landscape study](#) of the types of trainings that already exist on the topic of digital development, how development practitioners prefer to access training resources, and what role DIAL can play to improve digital literacy in the development community through the lens of the Digital Principles. Following desk research and informant interviews, DIAL convened global stakeholders at ideation workshops to test assumptions around training content and delivery methods. At the conclusion of these activities, it was determined that a demand *does* exist among digital practitioners for trainings that will help them to better understand and use the Digital Principles and that the community felt strongly that DIAL was best positioned to produce this program.

Learning from and building on the findings of these reports, the Digital Principles team will work with an instructional design firm to produce a series of new training courses to fill the gaps identified by stakeholders. Separately, the team is testing various models for delivering these courses and reaching our global stakeholders to ensure successful scale and sustainability of these resources.

Several Digital Principles courses currently exist:

1. An in-person and virtual “[Digital Principles 101](#)” course (In-person is roughly 8 hours of facilitated training, and the virtual version is roughly 6 hours of facilitated training). This has been delivered

globally in English and Spanish, both online and in-person. An accompanying “Training of Trainers” workshop also exists (both in-person and virtual options), which prepares participants to facilitate the 101 workshops at their own organizations (final written guide soon to be publicly released)

2. A self-paced, online “[Introduction to the Digital Principles](#)” course (Roughly 6-8 hours of content)
3. [Five self-paced individual modules](#) covering topics such as an Introduction to the Digital Principles, Emerging Technology, Gender, Ethics, Privacy and Security (Roughly 5 hours of content altogether)

These course materials, like all Digital Principles and DIAL resources, are published under a Creative Commons license.

Scope of Work

The objective of this work is to support Digital Principles team at DIAL in the design, development, and production of two, multi-module and multimedia online training courses, and companion training-of-trainers courses, focused on new topics in digital development and the Principles for Digital Development themselves. The selected instructional design firm will be responsible for taking existing and new content and transforming it into instructional materials suitable for in-person delivery, with suggested adaptations for virtual delivery. The vendor will assist in the testing of these courses, will refine the course designs based on feedback from users, and will be responsible for finalizing the materials.

These two additional courses, *Digital Principles 201* and *Digital Principles 301*, will build on our current *Digital Principles 101* and offer advanced, new content on related topics. Each course should be a stand-alone learning experience, so that while they are sequential, they are self-contained. Each course should be envisaged to take 6-8 hours of elapsed training time to complete (including instruction, discussion and exercises). Each course should be accompanied by a “Training of Trainers” course.

The courses should follow *Digital Principles 101* in style and format. The courses must be designed to be facilitated in-person but suggest adaptations for virtual delivery. Additionally, the vendor must deliver the courses in standard file formats so courses can be migrated across different platforms.

The vendor will bring experience in instructional design, facilitation, international development, and adult learning. The vendor will also have knowledge and experience designing courses according to the ADDIE model or its derivatives. The DIAL team has adopted an adaptation of the ADDIE model (see Annex 2) which will guide the work the team does with the vendor.

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.

1. Phase I: Review existing documentation and courses

- The selected ID team will review existing DIAL documentation and materials developed for the training program (landscape reports, training program strategy, etc.), existing and planned courses and course designs, and will review existing Digital Principles content to better understand content.

- Together with DIAL, the team will hold a kick-off meeting to agree on key milestones, approach, and design considerations, and to agree on the course topics and broad strokes of the content.
 - In consultation with the DIAL team, the vendor will deliver an inception report that outlines the intended approach, course content and topics, timelines including review periods, and considerations for the project.
2. **Phase II: Design of courses**
 - **Design two pilot training courses** – With input from DIAL, design two, multi-module¹ (5 modules minimum) online training courses. The vendor will specify modules, relevant content, and platform requirements.
 - **Design two companion ToT courses** – With input from DIAL, design two companion training-of-trainer courses that will allow facilitators to be trained in the delivery of the pilot training courses. The vendor will assist in specifying modules and platform requirements.
 3. **Phase III: Test training courses** – Participate in the testing of the training courses with target user groups and collect feedback on changes/adaptations to the courses as necessary. These tests will occur virtually. The vendor will be expected to support the DIAL team in the identification of the target user groups.
 4. **Phase IV: Refine training courses** – Based on feedback from the testing phase, refine the pilot trainings to a beta version.

Vendor Responsibilities:

- Attend a kick-off meeting with Digital Principles team.
- Develop an inception report setting out intended approach restating the understanding of work and including a RACI chart and Gantt chart of shared responsibilities with Digital Principles team
- Organize and facilitate weekly check-in meetings to review updates, request inputs and share results of ongoing work
- Provide support in identifying stakeholder target/user groups for testing phase and interview and test content and prototypes
- Provide typed notes from meetings and interviews with external stakeholders
- Produce at least two draft versions and one beta version of training courses
- Produce all final deliverables as stated in the section below

DIAL Responsibilities:

- Organize a kick-off meeting to discuss objectives
- Maintain close coordination and support with the vendor to ensure smooth execution of the project
- Attend all regular and ad-hoc meetings arranged by Consultant,
- Review draft versions of all deliverables, including providing feedback to the Consultant within a reasonable timeframe
- Identify stakeholders/target user groups for interviewing and testing of content and prototypes
- Review and provide notification of acceptance of all final deliverables.

Deliverables

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

¹ For this project, a module is defined as a segment of instruction. It is a stand-alone, “self-contained” instructional section of your course. For the purposes of this RFP, each module should run roughly 60-90 minutes in length.

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.

#	Phase I	Activities/Deliverable	Estimated Timeframe
1	Phase I: Review existing documentation and courses	Kickoff + Inception phase Review existing documentation and courses <ul style="list-style-type: none"> Deliverables – inception report: outlines intended approach, topics and timelines including review periods 	2 weeks
2	Phase II: course design	Design and develop training courses and content <ul style="list-style-type: none"> Deliverables – two draft 6-8 hour courses and two accompanying Training of Trainer courses 	5 months
3	Phase III: test training courses	Identify target user groups and test Training Courses <ul style="list-style-type: none"> Deliverable – course evaluation report 	4 months
4	Phase IV: Refine Training Courses	Refine and finalize Training Courses <ul style="list-style-type: none"> Deliverables – two finalized 6-8 hour courses and two accompanying Training of Trainer courses 	3 months

This work will be delivered over the course of 12 months between November 2020 to November 2021. The vendor will be expected to work closely with DIAL and have regular/weekly check-ins. Start date will be contingent upon final contracting and availability.

N.B. The Estimated Timeframe in the above table does not imply that a given phase must be completed for both courses before the next phase begins. It is possible that design of one of the courses may proceed faster than the other. The above estimates suggest a desired overall rate of progress in calendar time, but vendors should base their proposals and their budget on their own estimates of the required workload and their own capabilities in terms of staffing, etc.

Proposal Submission Requirements

Proposal submissions, which may be created in **PDF or any common equivalent file format** (and must be typewritten, preferably no longer than 12 pages total, no specific fonts or formats are required), must include the following components. As part of the proposal submission, the vendor will also complete a case study exercise, as detailed in Annex 1, to demonstrate top-level design approach to curriculum development (2-3 pages). 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.
- Describe the design and objectives to deliver Digital Principles 201 and 301 courses and accompanying ToT courses
- 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
- 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 and/or similar research
 - Demonstrate experience working with donor organizations (please specify which donors)
- 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
 - 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
- Case Study Exercise
 - Review the case study in Annex 1 and 4D Model Approach in Annex 2
 - Describe, in outline, the approach, key issues to for consideration, and overall design aspects of the courses and their key components.
- The vendor should also supply a list of eLearning platforms they have experience working with and can recommend for hosting new and existing content.

Submission Format and Timeline

- All submissions are due on **October 28, 2020 by 11:59pm EST**. It is preferred that submissions should not exceed **12 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 **October 16, 2020 by 6:00pm EST**.
- Questions and clarifications from DIAL will be communicated to Respondents between **October 17, 2020 and October 21, 2020** with a kind request for prompt turnaround on part of the Respondents.
- The selected Respondents should expect to be notified on/about **November 6, 2020 by 6:00pm EST**.

- All proposals should be submitted to Claudine Lim (clim@digitalimpactalliance.org) with Nadja Moore (nmoore@digitalimpactalliance.org) in copy. Respondents should expect a confirmation of receipt within 48 hours, if one is not received please follow up with Claudine Lim (clim@digitalimpactalliance.org).

Questions and Answers

Please send questions to Claudine Lim (clim@digitalimpactalliance.org) with Nadja Moore in copy (nmoore@digitalimpactalliance.org) by at 6:00pm EST on October 16, 2020. 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. Project Approach	
The proposed approach shows an understanding of the objectives and a clear plan for achieving them	
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	
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	
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	
5. Case Study Exercise	

Criteria	Score (1-5)
The offeror demonstrated an effective design approach to curriculum development	
6. 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 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 proscribed by the funding partners 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.

Annex 1. Case Study Exercise for Top-Level Design Approach

A Development Program located in the “Global South” aims to use Information and Communication Technologies (ICT) for economic opportunity creation and increase employment for disadvantaged youth. The Program expects to equip participants with opportunities for internships, full-time jobs, and for participation in the virtual economy. Targeted participants are aged between 16-40 and includes women who were traditionally unable to participate in post-secondary or professional education opportunities.

Based on the outcome of a recently conducted needs assessment (i.e.; the “Define” stage of the 4-D Instructional Design Model, Annex 2), the Development Program wishes to build out a new component of their Program: a Digital Skills Development Project. This new project aims to create a pool of digitally competent youth who are able to apply their new technical ICT skills to increase their potential income through informal microbusiness initiatives and, open the doors to employability opportunities in the formal economy.

The overall objective of the hypothetical project: In one year, train one hundred participants and build skills/knowledge in digital marketing. About 50% of participants will be women, many of whom must combine their household duties with their intended study.

Please respond to this short exercise by:

1. Describe, in an outline, the design of a Digital Skills training course which will address market demands for digital skills. This should include both technical and soft skills relevant to digital marketing, graphics design, and modern marketing and branding, required to optimize the online presence of a business.
2. Describe, in outline, the design of a Train the Trainer workshop for local trainers who will teach the above course. The workshop is expected to train instructors and facilitators appropriate teaching skills and course management and delivery methods, as well the evaluation and maintenance of course quality.

Responses should be framed using the 4-D Instructional Design Model (Annex 2), with special attention to the “Design, Develop, Deliver” stages. This exercise is not asking respondents to fully design the above training activities, but rather to describe the proposed approach to the task, the key issues to be taken into consideration, and the overall design aspects of the courses, and their key components.

Responses should be no more than 3 pages.

Annex 2. The 4-D Instructional Design Model

The following text is extracted from a chapter of a forthcoming book, It is presented here as a guide to the approach to be adopted in responding to the exercise presented in Annex 1.

The Holistic, or 4-D, ID Model

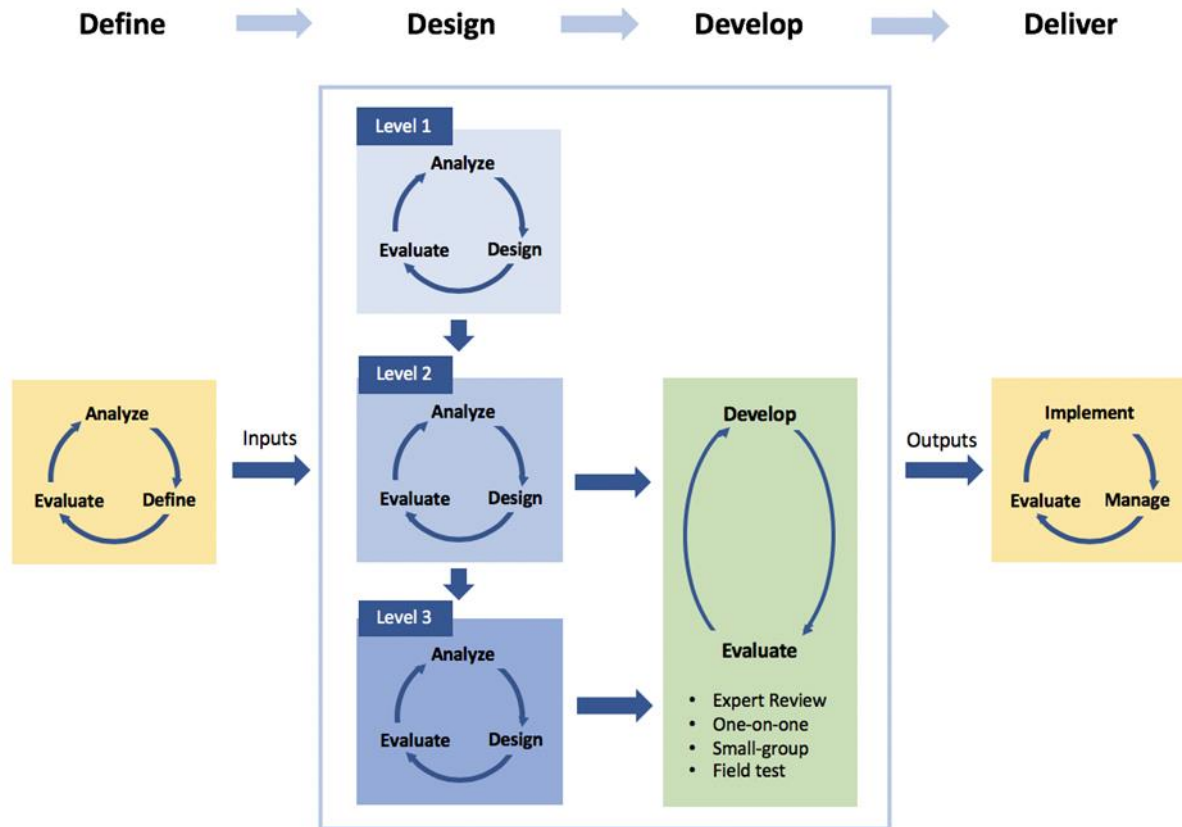
One commonly used term in the instructional design field is “the ADDIE model.” ADDIE is an acronym for Analysis, Design, Development, Implementation, and Evaluation. ADDIE has been widely used for many decades by ID practitioners as a model for instructional design and development. It is generally agreed that ADDIE is an illustration of the generic, essential steps of the ID process.

ADDIE has given rise to other more detailed representations of how ID is performed in practice. The model shown here is a recent adaptation of one first proposed by Romiszowski in the 1981 book “Designing Instructional Systems”, further developed over the following years and, most recently, updated for inclusion in a book currently being authored by Charles Reigeluth and YunJo An, to be published by Routledge in 2021. The special characteristic of this model is its multi-level nature. It suggests that a project may call for up to three levels of design.

- 1) **Top-level** design to create a general, “top level”, picture / vision that includes a top-level definition of objectives, content, sequence, and instructional methods.
- 2) **Mid-level** design to provide the next level of clarity, including the sequence of “enabling” step-by-step, objectives and assessments, more detailed selection of methods, etc.
- 3) **Lower-level** design to create a detailed blueprint of the instruction, including the lower-level objectives, assessments, activities and exercises for every step of the learning process.

Figure 1 is a “systems diagram” of the **4-D** instructional design, development, and evaluation model. The large box occupying “center stage” represents the design and development functions.

Figure 1. A multi-level or “holistic” ID model – also called the 4-D Model



Design. In the left-hand part of this box, are three instructional design levels. They are organized vertically, indicating that top-level design is followed by mid-level and lower-level design. At each of these three levels, we see a cyclical, or iterative process of analysis, design, evaluation and, if proved to be necessary, further analysis, design, and so on. Analyses of learners, resources, and context are conducted to inform the design decisions about both what to teach and how to teach it.

However, it is not always necessary to do all these kinds of analysis. The nature and scope of each ID project determine which of the various kinds to conduct. For example, revising an existing course to cover a new procedure or tool would not require another top-level or mid-level analysis, but only a lower-level focus. Similarly, deciding whether, or not, to adopt a course being offered by an external provider may require only a top-level analysis.

Develop. In the right-hand part of the big box, we see the instructional development process, intimately linked to the design activities as shown by the arrows interlinking the subsystem boxes. Development may be performed at several levels of detail, as required by a given project. Development also involves careful evaluation at each stage. However, in contrast to the design stages, where evaluation entails expert review by instructional designers and subject-matter experts to improve the decisions taken at each design level, evaluation during the development process involves trying out the instruction with real learners to improve it.

To complete our picture of the process, on both sides of the big box we have key inputs to and outputs of the core instructional Design-Development process – two more D’s: Define; Deliver.

Define. On the left of the diagram is a box representing the activities that precede the instructional design and development process. They include analysis of the need for instruction, carried out in a holistic and integrated manner that considers other forms of intervention that may be necessary in addition to, or in place of, instruction. These activities, therefore, evaluate whether there is a need for instruction and clearly define that need in the form of learning objectives.

Deliver. Finally, on the right of the diagram, there is a box representing the activities that follow instructional design and development. These entail delivering the instructional system for regular, full-scale use in the training department, workplace, or some informal learning environment (as appropriate), where the trainers and/or other ancillary staff will deliver the instructional system by implementing, managing, and evaluating it. The process may be summarized as **DEFINE – DESIGN – DEVELOP – DELIVER**, with up to three levels of iterative cycles of analysis, design, and evaluation. Hence it is sometimes called the 4-D Model.