Request for Proposals

Sustainable Business Model toolkit: UX and Developer

June 23, 2021

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dial Digital Impact Alliance

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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. DIAL combines practical research with evidence-based advocacy to identify which digital efforts work, package them as re-usable solutions, and encourage their use. DIAL is funded through a collaboration among the Bill & Melinda Gates Foundation, the United Kingdom's Foreign & Commonwealth Office (FCDO) and the Swedish International Development Cooperation Agency (SIDA), and hosted within the UN Foundation in Washington, D.C.

Project Description

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.

Build for Sustainability is one of the Principles that small organizations struggle with the most. Building sustainable programs, platforms and digital tools is essential to maintain user and stakeholder support, as well as to maximize long-term impact. Sustainability ensures that user and stakeholder contributions are not minimized due to interruptions, such as a loss of funding. A program built for sustainability is more likely to be embedded into policies, daily practices and user workflow. For many digital initiatives, institutionalization by a nongovernmental organization, private company or local government is the ultimate goal in achieving long-term, positive impact. For others, institutionalization is achieved by developing a business model that has sustainable revenue generation.

To help social enterprises and small businesses think through their own sustainability – and the sustainability of their programs, tools, and products – DIAL is partnering with Fondation Botnar to develop a Sustainable Business Model tool. This work will involve adapting existing business model tools for non-profits and private sector companies. This tool will help organizations think about sustainability from the start and will serve as a resource to make building for sustainability easier.

The goal of the Sustainable Business Model toolkit is to support entrepreneurs and intrapreneurs who have developed digital products and services to be used for development and humanitarian purposes and need to create a sustainable business model to sustain these services. As it stands, there is little information available on sustainability. Rather, the bulk of available guidance for actors working to create social impact goods center around environmental, social, and corporate governance (ESG).

Phase I of the Sustainability Business Model project, now complete, focused on carrying out user research on what type of guidance is required on sustainable business models. This included a preliminary literature review of 66 key texts, Key Informant Interviews with 13 stakeholders who would be in the target group. This was followed by a survey that was sent to 161 recipients which we received 44 responses to.

The literature review, KIIs and survey also highlighted the areas where there were gaps in current guidance on sustainable business models for social impact digital products and services for public goods (e.g., health, education, etc.)

Based on this work three key audiences for the project emerged: Social digital entrepreneurs (those developing digital solutions for humanitarian and development organisations and governments), social digital intrapreneurs (those developing digital solutions within humanitarian and development organisations), and mentors and advisors for these two groups. The research also highlighted that intrapreneurs and entrepreneurs preferred individual mentoring or advice to static PDF type tools. This has led to a focus on an interactive and personal guidance approach to the toolkit. The personal approach will be used in the style of writing and through a level of automated guidance through the toolkit (diagnostic and auto filling of some sections).

Our project therefore has a strong and sound evidence base for how the guide should be developed. Based upon this extensive problem analysis, we will design and develop the guide so that it is optimised for adoption. We will do this based upon factors identified in E.M. Rogers' "Diffusion of Innovation" theory:

1. **Compatibility:** We will ensure that the guidance is compatible with a current business model framework, e.g., the Business Model Canvas.
2. **Trialability:** We will obtain stakeholder and user feedback at key development stages of the guidance (see above).
3. **Complexity:** The guide will be developed in a modular format with a diagnosis that will enable users to navigate the guide effectively.
4. **Observability:** Going "digital first" will enable the quickest and easiest diffusion of the guide.
5. **Relative Advantage:** Using existing guidance as a baseline, and developing a strong understanding of the gaps through our research, we are ensuring that we are not 'reinventing the wheel' but rather curating content where it exists, and only developing new content where it doesn't exist, or is inadequate for the digital public goods sector.

With the use of this toolkit, development organizations and social entrepreneurs will be able to develop business models that will enable the sustainable and scalable use of digital tools, programs, and systems to significantly impact development outcomes, particularly children's health and wellbeing.

Scope of Work

In Phase II of the project, the consultant will support the UX and development of a Sustainability Business Model toolkit as follows:

- Finalizing product requirements and intended user behavior for prioritized user personas previously identified by the project team;
- Wireframes and visual design for both desktop and mobile views;
- Development of the Sustainability Business Model canvas (responsive website including interactive functionality). Covering the 9 Building Blocks of the Business Model Canvas and two additional building blocks on 'End Game' (how the product/service will look and the be delivered when it is sustainable and/or scaled) and 'Organisational Development' (how to manage a growing team and/or business)

- Development of a customizable diagnostic tool which will focus users on the most relevant parts of the content to their unique situation
- Develop and embed between 10-15 interactive tools for users
- Develop a mechanism for auto populating the canvas from user inputs and the interactive tools.
- User engagement and testing.

While final details of the system will be designed and negotiated as part of the work process above, initial system requirements have been outlined by the project team that should be considered in responding to this RFP can be described across several key areas of the system. A content management platform that will allow ongoing evolution of content across multiple modules for user review and interaction will be created. The items noted as "shall" below are baseline requirements for the system. The items noted as "should" could be negotiated or discussed further.

- User Orientation
  - The system **shall** provide materials in multiple media to potential users to enable them to evaluate whether or not it will be useful for their needs.
  - The system **shall** offer detailed information about each component of the tool's content in order for the user to understand which of those components would be useful to explore in more detail.
  - The system **shall** offer an evaluation form/tool/quiz that will help the user determine whether or not to proceed through content modules in a particular sequence, or to peruse them "on demand".
  - The system **should** provide sufficient information and guidance to allow users to form a clear goal or objective for continuing further with the system and its content.
  - The system **should** present all of its information and knowledge in a clear and concise visual manner, and should not appear cluttered or overwhelming.
- Navigating and Working with Materials
  - The system **shall** allow users to visually select components for exploration and work through a business model canvas and/or through a list in order for them to have affirmative control of the sequence of work.
  - The system **shall** display the ongoing status of components which have been viewed and completed by the user so they can understand what work (if any) remains to be done.
  - The system **should** filter or prioritize specific content in each module customized to user profile items or previously provided information about their circumstance, in order to reduce the amount of clutter or non-applicable information displayed.
  - The system **shall** allow the user to skip around through content modules, or leave the session altogether, and resume their work later without duplication, in order for them to take breaks, work with colleagues, or review external materials.
- Recording and Storage of Data
  - The system **shall** allow users to enter, store, and maintain their own custom notes on the material for future reference during activities or future review, so they will be better able to apply the materials to their organizations and situations.
  - The system **should** allow users to move quickly to interactive exercises without reviewing the background information so they can quickly work with colleagues in an in-person setting, or for other purposes.

- The system **shall** offer a method for someone to enter data in an offline setting such as an in-person workshop, and then be input back into the tool for inclusion in the business model canvas visualization.
- Sharing User Progress and Results
  - The system **shall** allow the export and/or sharing of notes taken in the system (see above) or other exercise data collected, so their colleagues can easily review the materials.
  - The system **shall** offer users a method to collaborate with others, perhaps offline, in order to work through exercises and collect data, before entering it into the canvas model, so that colleagues not at a computer could participate in developing the model.
  - The system **should** allow users a way to print or otherwise export their work, both the underlying data for exercises and the final synthesized business model canvas.
- Getting Help and Reference Material
  - The system **shall** contain an area for users to refer to a glossary of terms used throughout the content models.
  - The system **should** offer suggested "next steps" or actions to take after completing the entire canvas development process in a type of post-exercise debrief.
  - The system **should** offer a list of Frequently Asked Questions for general support information and guidance on how to use the system.
  - The system **should** direct users to a support forum for peer support and discussion of the process and tool usage support.
  - The system **shall** offer a bug reporting and/or user feedback collection tool, which would go to the product team for future improvements.
- Maintaining and Upgrading the System
  - The system **should** allow administrative users to edit content within each module, or to add/remove/change modules, or exercises.
  - The system **shall** be designed in such a way that its configuration and any stored data can be regularly backed up by administrative users for restoration in the event of problems.
  - The system **should** allow administrative users to see a log of any key background tasks or user events to assist in troubleshooting.
- Additional Requirements
  - The system **should** be designed in a way to support users with sporadic, limited, and slow connectivity, so they are able to make full use of the system in either an online or offline mode.
  - The system **should** be designed in a way to maximize encryption of any user profiles and entered information that may be stored, so that data can not be retrieved by other users or administrators.

Deliverables

The following table reflects the anticipated deliverables and schedule required for this project. Respondents may suggest amendments as part of their proposals, for approval prior to contracting.

#	Deliverable/Output	Estimated Completion Date

1	Facilitation of workshop to finalize scope and "final" feature set for initial release of web tools	Within 2 weeks of start date
2	Wireframes and visual assets for the Sustainability Business Model toolkit and customizable Diagnostic tool	3 weeks after completion of Deliverable #1
3	Development of the interactive Sustainability Business Model toolkit website and customizable Diagnostic tool	4 weeks after approval of wireframes from Deliverable #2
4	Facilitate user acceptance testing of planned features	2 weeks after completion of Deliverable #3
5	Final website revisions based on UAT results/feedback	Within 2 weeks of completion of UAT; and no later than 2 weeks before contract end date.

Period of Performance

Work will start on or around August 23, 2021 and need to be completed by December 31, 2021. During this time, we anticipate a close working relationship with the chosen vendor.

Outcomes

The work completed by the consultant under this scope of work will be done primarily to support Intermediate Outcome 2.2 "Global development actors improve their digital practice through standardized training and measurement based on the Principles for Digital Development" under DIAL's current Results Framework. The following list of indicators will measure the results and effects of the Sustainability Business Model toolkit and related works that are affected by the consultant's work:

Indicator	Indicator Definition
Intermediate Outcome 2.2	# of organizations that report improved digital capacity as a result of engaging with the Digital Principles training and measurement resources (including the sustainability canvas tool)
Outcome 1	# of citations of sustainability resources through traditional and social media

Outcome 2	# of organizations reporting the use of components of the sustainability resources
Output 1	# of views and downloads of sustainability canvas learning resources
Output 2	# of digital development professionals reporting that they find the sustainability resources usefulness

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 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
- Relevant experience
    - Demonstrate firm and key participants' experience relative to the scope of work
    - Provide at least 3 examples of similar work
- 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
- References
    - Provide names and email addresses of at least two prior client willing to discuss their experiences working with you.

Submission Format and Timeline

- All submissions are due on **July 16, 2021 by 11:59pm EDT.** 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 and clarifications will be communicated to Respondents between **July 19, 2021** and **July 21, 2021** with a kind request for prompt turnaround on part of the Respondents.
- The selected Respondent will be notified on **July 23, 2021 by 6:00pm EDT**
- Please send all submissions to Trish Dorsey at tdorsey@digitalimpactalliance.org

Questions and Answers

Please forward any questions to tdorsey@digitalimpactalliance.org by **July 9, 2021.** 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 (1-5)
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	
Thoughtful risk identification and mitigation strategies	
4. Capabilities and Experience	
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	
5. Value	
The proposed pricing is within budget	
The proposed pricing demonstrates a competitive price and good value for the money	
Development and Emerging Market Experience	
6. Mission	
Preference for firms or organizations based in LCDs	

Preference for firms founded or lead by women	
Preference for firms with staff based in target countries where work will be done	

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 the 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/DIAL 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 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 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), Foreign, Commonwealth and Development Office (FCDO) 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 prompt and broadly disseminated under a creative commons license, and any funded developments will be made available at an affordable price to:

- People most in need within developing countries and /or
- 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.