



REQUEST FOR PROPOSAL

Date: **August 10, 2022**
Subject: Request for Application for **Project Level and Global Management Information System for Monitoring, Evaluation, and Learning**

RFP Number: **RFP-MEL-082022-01**
Offer Deadline: **August 31, 2022; 5:00 PM EST (Washington, D.C.)**

Counterpart International (hereinafter Counterpart) is soliciting proposals for the supply of **Project Level and Global Management Information System for Monitoring, Evaluation, and Learning** as described in this Request for Proposals (RFP).

Firms invited by Counterpart (hereinafter “bidders or Offerors”) to submit offers (hereinafter “bids” or “offers”) for the services described in the attached supply schedules are under no obligation to do so. The Bidder shall bear all costs associated with the preparation and submission of the Proposal, Counterpart will in no case be responsible or liable for those costs, regardless of the conduct or outcome of the solicitation.

This Request for Proposal includes the following:

- I. Instructions to Bidders
- II. Technical Specifications

All correspondence and/or inquiries regarding this RFP should be requested in accordance with the enclosed Instructions to Bidders (Section I, Clause 10, Clarifications).

The Instructions to Bidders (henceforth ITB) shall not form part of the bid or of the **Vendor Contract**. They are intended to aid bidders in the preparation of bids. For the purposes of interpretation of these ITB, unless otherwise stated, the number of days stated herein shall be consecutive calendar days.

Submission of bids should be completed in accordance with the enclosed instructions to Bidders (Section I, Clause 11, Submission of Bids).

REQUEST FOR PROPOSAL

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SECTION I: INSTRUCTIONS TO BIDDERS

1. Introduction

- 1.1 **Request for Proposal (RFP) No. RFP-MEL-072022-01**, dated **August 10, 2022**: Counterpart is hereby soliciting bids for the supply of comprehensive **Project Level and Global Management Information System for Monitoring, Evaluation, and Learning** as described in Section II.

2. Eligible Source Countries for Goods and Services

- 2.1 All goods and services to be supplied under the **Vendor Contract** shall have their origin in countries listed under the USAID Geographical Code 937 and shall include the following:

937 – “Any area or country including the U.S., cooperating country, and developing countries, excluding advanced developing country.” List of Advanced Developing Countries: <https://2012-2017.usaid.gov/sites/default/files/documents/1876/310mab.pdf>

- 2.2 A bidder will be considered ineligible if it has been suspended, debarred, or ineligible, as Indicated on (1) the “List of Parties Excluded from Federal Non-procurement Programs” and/or (2) the “Consolidated Lists of Designated Nationals”.

3. Preparation of Bids

- 3.1 Bidders are expected to examine the specifications and all instructions contained in this RFP. Failure to do so shall be at the Bidder's risk.
- 3.2 The Bid prepared by the Bidder and all correspondence related to the Bid and exchanged by the Bidder and Counterpart shall be in English.

4. Contents of Bid

- 4.1 Submitted bids are required to consist of the following documents:

Technical Proposal

1. Organizational background showing evidence of prior performance in supplying **Project Level and Global Management Information System for Monitoring, Evaluation, and Learning**;
2. Outline of proposed services, solutions, and team;
3. Plan of action and implementation timetable to address the Specific Tasks under Section II;
4. Statement of Qualifications, referenced in Section I Clause 7.

Price Quote

5. Price Quote – referenced in Section I Clause 6.

5. Format and Signing of Bid

- 5.1 The Bidder shall prepare one bid in two parts (technical and price quote) with all the required sections of the proposal typed or written in legible ink and shall be signed by a person duly authorized to bind the Bidder.

6. Price Quote

- 6.1 Bidders shall prepare a price quote in a workable Microsoft Excel document (unlocked with intact formulas) specifying the detailed cost breakdown and the total price of the services been offered in response to this RFP. If vendor pricing are a simple fixed price proposal, an Excel budget is not required. The Bid shall clearly indicate that the prices shall be for the services whose technical specifications are described in Section II – Technical Specifications.
- 6.2 The Bidder shall indicate the unit price in USD for each service, the description, the quantity, and the total cost in USD of the Bid, which will comprise the total price of the Bid. If there is any discrepancy between the unit price and the total amount, the unit price shall be considered as correct and the total amount adjusted accordingly. It shall be assumed that the Bidder is not bidding on any item for which a unit price or total amount is not indicated.

7. Statement of Qualifications

- 7.1 The Bidder shall include in its bid evidence in support of its technical qualifications and ability to perform the **Vendor Contract** if its bid is accepted. This shall consist of: 2 to 3 references to successful prior projects of a similar nature are of key importance with a description of services provided and scale of implementation (stating whether in headquarters and/or international project contexts).

8. Bid Validity Period

- 8.1 Bids shall remain valid until **November 8, 2022** which is ninety (90) days after the offer deadline. A bid valid for a shorter period shall be rejected as non-responsive.

9. Deadline and Late Bids

- 9.1 It is the Bidder's sole responsibility to ensure that bids are received by Counterpart on or before the Offer Deadline of **August 31, 2022 at 5:00pm EST**. Electronic submissions are strongly encouraged. Faxed bids will not be accepted.
- 9.2 A Bid received after the deadline for submission of bids shall be rejected. Bidders will be held responsible for ensuring that their bids are received in accordance with the instructions stated herein and a late bid will not be considered even though it became late as a result of circumstances beyond the Bidder's control. A late bid will be considered only if the sole cause of it becoming a late bid was attributable to Counterpart, its employees or agents.

10. Clarification of Bidding Documents

- 10.1 Clarifications may be requested in writing not later than five (5) business days prior to the Offer Deadline. The contact for requesting clarifications is:

Nigina Valentini, MEL Manager, nvalentini@counterpart.org

11. Submission of Bids

- 11.1 Only electronic submissions will be accepted. All bids with technical and price schedule must be received by **August 31, 2022** by **Nigina Valentini, MEL Manager, nvalentini@counterpart.org**

- 11.2 Ensuring successful transmission and receipt of the bids is the responsibility of the Bidder. It is recommended that no e-mail exceed the size of 10 MB, inclusive of attachments.
- 12. Amendment of Bidding Documents**
- 12.1 Counterpart may at its discretion, for any reason, whether at its own initiative or in response to a clarification by a Bidder, modify bidding documents by amendment. All prospective Bidders that have received bidding documents will be notified of the amendment by e-mail and such amendments will be binding on them.
- 13. Modification of Bids**
- 13.1 Any Bidder has the right to withdraw, modify, or correct its bid after it has been delivered to Counterpart, provided the request for such a withdrawal, modification, or correction together with full details of such modification or correction is received by Counterpart at the submission contact point given above before the time set for opening bids. Counterpart may ask any Bidder for a clarification of its bid; nevertheless, no Bidder will be permitted to alter its Bid Price or make any other material modification after the deadline unless the RFP has been amended or the deadline extended. Clarifications which do not change the Bid Price or other material aspects of the bid may be accepted.
- 14. Criteria for Award and Evaluation**
- 14.1 Subject to Clause 15, Counterpart will award the **Vendor Contract** to that Bidder whose proposal is deemed acceptable and which offers the best value based upon the evaluation criteria in Section II – Technical Specifications – Evaluation Criteria. In order for a bid to be deemed acceptable, it must comply with all the terms and conditions of the RFP without material modification. A material modification is one which affects the price, quantity, quality, delivery or installation date of the equipment or materials or which limits in any way any responsibilities, duties, or liabilities of the bidders or any rights of Counterpart. In addition, the successful bidder must be determined to be responsible. A responsible bidder is one who has the technical expertise, management capability, workload capacity, and financial resources to perform the work. Counterpart may, at its option, reject all bids.
- 15. Counterpart’s Right to Accept Any Bid and to Reject Any or All Bids**
- 15.1 Counterpart will reject any bid that is nonresponsive. Further, Counterpart reserves the right to waive any minor informalities in the bids received if it appears in Counterpart’s best interests to do so, to reject the bid of any bidder if, in Counterpart’s judgment, the bidder is not fully qualified to provide the services as specified in the **Vendor Contract**, or to reject all bids.
- 16. Notification of Award**
- 16.1 Before the expiration of the period of bid validity, Counterpart will notify the successful Bidder in writing that its bid has been accepted.
- 16.2 Upon the successful Bidder acknowledging receipt of the Notification of Award, Counterpart will promptly notify each unsuccessful Bidder, the name of the successful Bidder and that their bids were rejected. If after notification of award, a Bidder wishes to ascertain the grounds on which its bid was not selected, it should address its request to Counterpart in writing.
- 17. Acceptance of Privacy Policy and Terms and Conditions.**

By Submitting quotation/proposal to Counterpart International, The company or the individual consents to Counterpart's privacy policy terms and conditions (<https://www.counterpart.org/terms-and-conditions/>), and provides Counterpart International permission to process the company's or individual's personal data specifically for the performance of, and purposes identified in, this solicitation document and in compliance with Counterpart's legal obligations under applicable United States and European Union laws, data protection and regulations and any other applicable legal requirements. The company/Individual may withdraw their consent at any time by contacting privacy@counterpart.org. If consent is withdrawn, Counterpart reserves the right to accept or reject the offer.

SECTION II – TECHNICAL SPECIFICATIONS

1. General Background

Counterpart International is seeking proposals from private firms, non-government organizations, and/or education institutions for a web-based management information system/database in the context of Monitoring, Evaluation, and Learning that offers data management and intervention management functions. The goal of this system is to provide project management (DC Office and International Project Teams) with an easy mechanism for tracking of stakeholders' progress towards objectives, longitudinal data, and visualizing data in an efficient and effective way (i.e. dashboards, mapping, etc.). In doing so, the application will effectively monitor all the indicators in a project's Performance Monitoring Plan (PMP). The database should also be developed so that it can benefit from mobile based data entry and data display, as well as web-based.

The solution will also provide a Global/Organizational-level online database that offers data management, aggregation, and visualization of Counterpart interventions across the world. Project-level databases will feed the global database on a set of identified global measures to provide Counterpart Management in the US and across Program Teams, as well as strategic external audiences or clients, with an easy mechanism for reviewing Counterpart's successes and learning from Counterpart's interventions.

Interested organizations are requested to describe in detail how their product would: a) develop a Client/Stakeholder Information System (project-level), b) link stakeholders to sets of services/inputs/activities provided directly or indirectly, c) be accessible to staff in low bandwidth settings in international project settings and the U.S. HQ office, d) be able to track commodity movement (e.g. with barcoding), e) aggregate data, and f) incorporate contextual data needed for M&E purposes such as program quality indicators, program service provider capacity/performance indicators, and quality of work/learning environment for various geographic zones or socio-economic profiles. The application must be flexible and customizable to allow the addition of further resources and modules as they are developed.

2. Objective of the Assignment

MANAGEMENT INFORMATION SYSTEM FOR MONITORING, EVALUATION, AND LEARNING

This database will serve to provide information to Counterpart staff on two key levels.

First, it will aggregate data from the databases of each of Counterpart's country projects based on a set of Counterpart US office determined global indicators and accompanying Performance Indicator Reference Sheets (PIRS) that will clearly define terms, indicator calculations and other specifications to allow for the validity of project indicator data that will roll up to the regional and global levels. This will include data collected on stakeholders and on project activities. Each project will have an individual dashboard that will display this information in charts and graphs. Maps will also be available that display geocoded project data when available.

To ensure the protection of sensitive data, users will need to be assigned certain permission levels that gives them access only to certain projects. Staff with proper permission levels would be able to view, edit and download data for a given project.

This database will also serve to give Counterpart's management staff a global understanding of Counterpart's project accomplishments. This will be facilitated through rolling up project-level

information to inform Counterpart's established global indicators. Data on global indicators will also need to be viewable through a dashboard with charts and graphs. Users will need the ability to generate reports that tell the story of Counterpart's global impact in our various program areas.

Users of the Global Management Information System will include country offices staff such as Monitoring & Evaluation staff and Chiefs of Party who will view, edit and validate project level data. Counterpart US office Project Managers, Technical Directors and Executive and Management staff will use the database to monitor the progress of country projects, generate project reports and monitor to impact of the organization's work as a whole.

3. Scope of Work

PROJECT LEVEL MANAGEMENT INFORMATION SYSTEM FOR MONITORING, EVALUATION, AND LEARNING

Our projects are integrated programs with complex data management needs. This system will be primarily used by field and HQ Project Management Unit and HQ MEL team allowing to view overall workplan at a glance, including milestones, deliverables, reporting periods, and other calendar events. The system will also produce dashboards that could be shared with the donor and clients. It will allow staff members to get a snapshot of the outcomes of each of Counterpart's country projects and allow them to understand Counterpart's organization-wide impact on a global scale. The majority of stakeholders benefit from activities in more than one sector at the same time. Therefore, Counterpart requires a system that will:

- Ensure that the project can accurately follow unique stakeholders (with a unique identifier code) and households and allow for data tracking in terms of stakeholders' participation in project activities and their progress on outcomes over time;
- Be user friendly and adaptable to changing project needs;
- Be able to capture geospatial information and ensure mapping capabilities;
- Ensure confidential information is secure;
- Be cost efficient (not require substantial investment in separate and additional hardware or software up front nor require specialized equipment or user fees during the life of the program) and able to propose a sustainability model for field level continued use/transfer;
- Be fully hosted Software as a Service/cloud solution and able to work in low bandwidth environment;
- Allow the user to easily create new reports/dashboards according to the different audiences/needs. For example:
 - HQ staff would be able to review all project data and conduct quality control;
 - Field project staff would be able to do data entry from mobile devices and allows for data collection offline and quick upload to a cloud based server (tablets and smartphones, Android and iOS), conduct data quality assurance and data analysis, generate reports, and send out automated messages to grantees, partners regarding due date on data;
 - Project partners, grantees would be able to do data entry from mobile devices or directly on the web, conduct data quality assurance, view specific data dashboards; other stakeholders, including donors, would be able to view specific data dashboards related to program progress;
- Include Multilanguage capabilities – French and Spanish, with right to left capabilities for Arabic also preferred;

- Have the capability to store, import, and export data (to Excel, SPSS, ACCESS, etc.) and easily connected to external databases (i.e. via API; web services)
- Have the capability to link with the USAID Development Information Solution (DIS) platform
- Be adaptable for future improvements, such as the addition of biometric data to register and verify stakeholders;
- Allow the project to generate stakeholder ID cards/equipment barcode tracking with information such as entry date, stakeholder ID number, name, etc.;
- Allow for information management to assess differences in stakeholders/households participating by different factors (e.g., geographic, sex, participation in various activities, etc.);
- Allow the ability to create and track composite indicators composed of different variables);
- Allow for analysis of performance (i.e., tracking number of training events held by staff member, stakeholders reached, etc.);
- Be able to generate reports that visualize progress on indicator targets in the project's Performance Monitoring Plan;
- Be able to assign tasks to specific users and track budget at the activity level.

GLOBAL MANAGEMENT INFORMATION SYSTEM FOR MONITORING, EVALUATION, AND LEARNING

This system's global interface will be primarily used by Counterpart's headquarters staff for management, decision-making, and marketing uses. It will allow management to get a snapshot of how each Counterpart project is contributing to the overall Counterpart vision and mission. It will provide the senior management with dashboards and infographics of Counterpart's organization-wide impact on a global scale. Therefore, we require a system that will:

- Provide project specific dashboards for each of Counterpart's projects that display, in an aggregated manner, stakeholder-level and project-level data in charts and graphs for easy analysis;
- Provide dashboards that include map display for viewing geo-coded data;
- Provide dashboards using aggregated data across all projects;
- Roll up project-level information to a global dashboard that displays Counterpart's achievements on global-level indicators;
- Be user-friendly and accessible to users with a wide range of technology skills;
- Requires the ability to assign various user levels and levels of access to ensure privacy of sensitive data;
- Allow the ability to create reports on composite indicators;
- Easily connect to external databases (i.e. via API; web services);
- Be a fully hosted Software as a Service/cloud solution;
- Be specifically designed for M&E; does not require extensive customization;
- Allow data to be exported for further analysis in other software such as Excel and SPSS.

4. Assignment Duration, Place of Performance, and Other Conditions

These services will be implemented over a **six-month** period from **December 1, 2022** through **June 1, 2023**. This period will involve design, training, and implementation in U.S. and international project offices (see Expected Results, Deliverables in Section II Clause X). The vendor should also present

a plan and pricing for licenses/maintenance/upgrade/support on an ongoing basis after the six-month period

5. Staff Structure

Vendors must provide a single Point of Contact for Counterpart for the full assignment, with preference for a vendor employee rather than a third-party consultant.

6. Monitoring and Reporting

Counterpart will monitor the vendor based on the agreed upon implementation plan. Vendor will attend interim progress review meetings as requested by Counterpart.

7. Expected Results, Deliverables

As part of vendor's RfP response, the vendor will provide a detailed workplan that outlines the following.

1. Detailed process and timeline for system development
2. Details of personnel who will develop and implement system, and provide training and technical support (if different)
3. Hardware and software technical specifications
4. Technologies that Counterpart US and country offices must have or acquire for the application to work
5. Technical and cost information for any database or software that Counterpart would have to purchase
6. Information on server requirements for hosting data and applications
7. Anticipated travel needs for implementation, training, and technical support
8. Outline of training schedule
9. Estimated cost of initial establishment of system, including any requirements mentioned above, and training and technical support.
10. Description of future maintenance requirements/upgrading requirements
11. An information management system that is user friendly, can be easily adapted by either the project staff or in-country support services, and ensures security of information. The system must allow for manipulation of data.
12. A training manual on the use of the system.
13. Initial timeline of training of Counterpart staff on the use of the system.
14. Design and installation of data collection views on hand-held devices that work with information management system

A short-list of vendors will then be requested to provide a demonstration of the software in person or via video conference with screenshare.

8. Evaluation Criteria

Bidders will be evaluated based on their ability to respond to the requirements stated in Section II Clauses 2 and 3 and the expected results in Clause 8. Bidders should include information which will allow Counterpart to assess the following:

1. Adherence to RFP Instructions (5 points)
 - a. Timeliness

- b. Overall quality & level of professionalism
- 2. Company Information (5 points)
 - a. Experience with similar companies
 - b. Service department
 - c. References of past assignments
 - d. Partnerships, if applicable
- 3. Project Understanding (5 points)
 - a. Overall comprehension of project objectives
 - b. Understanding of the business requirements
 - c. Understanding of the business vision
- 4. Requirements (25 points)
 - a. Completeness of vendor response
 - b. Vendor ability to meet requirements
- 5. Product Viability and History (25 points)
 - a. Technology is sustainable
 - b. Product roadmap
- 6. Software Demonstration for shortlisted vendors (20 points)
 - a. Solution is integrated
 - b. Aligns with company objectives
 - c. Ease of use
 - d. System performance
 - e. Flow and simplicity
 - f. System ability to handle requirements
 - g. Flexibility, tailorability, extensibility
- 7. Fee Summary and Pricing Structure (15 points)