



Request for Proposal

RFP Title: Assessment of MERL Methodologies (Two Tasks)

RFP No: LEAP-2024-2

Date of Issuance: July 18, 2024

Closing Date: August 1, 2024

Estimated Award Date: August 8, 2024 – September 30, 2024

Contract Type: Fixed Price

I) Summary

Pact is seeking proposals for one or both of the following tasks: (1) Evaluability assessment and design of the analytic framework for a quasi-experimental study; (2) Review of Pact monitoring, evaluation, and learning plans. Pact intends to award one or more offerors for a two-month period of performance between August 8, 2024, and September 30, 2024. Questions may be sent to Ms. Lauren Serpe (lserpe@pactworld.org) until July 24, 2024. Proposals are due August 1, 2024, via email to Ms. Serpe. If applying for both tasks, offerors should submit one proposal per task.

II) Background

Pact has worked to increase the rigor of its monitoring, evaluation and learning (MEL) plans to introduce more evidence generating activities to fulfill learning, evaluation and research needs. This request for proposal (RFP) seeks to review Pact's progress in doing so, and to assist in the preparation for an upcoming quasi-experimental analytic study.

Pact's Learning, Evidence and Impact (LEAP) team is its DC-based MEL team. This LEAP team is involved in project and MEL system design in the proposal and project start-up stages and later assists in-country, project-based MEL colleagues to finalize and implement MEL Plans during the life of the project. Pact works across various development sectors spanning civil society/governance, health/OVC, sustainable markets, and others.

III) Scope of Work

A. Place of Performance

All services required under this solicitation will be performed remotely.

B. Period of Performance

All goods and services required under this solicitation will be delivered from August 1, 2024, to September 30, 2024.

C. Scope of Work

Applicants are invited to apply for one or both of the following service tasks.

Task 1: Review of Pact monitoring, evaluation, and learning plans.

Under this task the consultant will assess the quality and relevance of Pact MEL plans. The evaluation questions guiding this assessment are:

- (1) To what extent are Pact proposal and project MEL plans meeting the standards of USAID?
- (2) To what extent are Pact proposal and project MEL plans competitive with Pact's peer organizations?
- (3) To what extent are Pact proposal and project MEL plans designed in a manner that enables evidence generation and the engagement of project beneficiaries through empowering, participatory, and localizing approaches?

Pact expects that the consultant will review 15 of Pact's MEL plans – 5 proposal MEL plans and 10 project MEL plans – and assess them against criteria related to the assessment questions. The MEL Plans will contain a mix of sectors spanning civil society/governance, health/OVC, and sustainable markets. The consultant will develop recommendations to improve the standards of the plans for proposals and projects, and to improve how evidence generation and community empowerment are built into the project MEL system. In doing so, the consultant may interview up to 10 individuals (consisting of Pact staff members and external stakeholders) and conduct 1 focus group discussion with Pact's central MEL team (the "LEAP" team).

The final approach will be determined in consultation with the consultant, but Pact expects the following activities and deliverables: (1) kick off meeting (2) review of 15 MEL plans (3) review of existing USAID standards and peer organization MEL plans (4) primary data collection via 10 in-depth interviews and 1 focus group discussion (5) presentation of draft analysis and findings via a half day validation workshop with Pact's LEAP team (6) submission of draft report (7) submission of final report.

Pact anticipates that this will require a level of effort of no more than 20 days.

Task 2: Evaluability assessment and design of the analytic framework for a quasi-experimental study.

Under this task the consultant will assess the evaluability of a project's existing data, and based on the results of that evaluability assessment, design a quasi-experimental study including the analytic framework. Based on that design, the ENGAGE project will conduct a national survey in December 2024 and conduct analysis according to the quasi-experimental analytic plan with the help of a future consultant.

The project is a 9-year civic engagement project in Ukraine, the USAID ENGAGE activity. ENGAGE has conducted public opinion research on mostly a twice-annual basis. After the invasion by Russia, the research included surveys of internally displaced persons and those residing outside Ukraine. To date, the project has completed over 15 survey waves.

The ENGAGE project has successfully performed propensity score matching to compare the results of ENGAGE project participants with non-ENGAGE citizens matched via the PSM methodology. The ENGAGE team would like to repeat and expand this effort to include civic engagement and civic education data, compare dosage levels, compare pre/post invasion levels, and compare between residents and displaced persons.

The draft research questions include the following: (1) Is there a statistically significant difference between the average Ukrainian and an ENGAGE participant, in: in civic engagement levels, civic literacy levels? (2) Is there any difference in civic literacy and engagement levels of ENGAGE participants and non-ENGAGE citizens before and after the invasion? (3) To what extent do different dosage levels (degree of participation in ENGAGE activities) affect civic literacy and engagement levels of ENAGAGE participants? (4) What individuals are more and less likely to benefit from civic literacy and engagement interventions?

The final approach will be determined in consultation with the consultant, but Pact expects the following activities and deliverables: (1) kick off meeting (2) review of existing data (3) interviews with ENGAGE staff to fill any knowledge gaps (4) finalization of answerable research questions (5) design of quasi-experimental study, including instructions for the forthcoming national survey (6) review workshop (7) submission of final plan in written form.

Pact anticipates that this will require a level of effort of no more than 15 days.

IV) Submission Instructions

Proposals will be evaluated based on the evaluation criteria set forth in Section V. Offerors shall provide all documentation in English. The technical proposal should be in font size 12, Times New Roman, single spacing. Offerors may apply for one or both service tasks; **if applying for both tasks, offerors must submit a complete separate proposal per task.**

Submission Contents. Applications shall be no more than 6 pages, excluding the cover sheet, CV, and the budget. Applications must include the following information:

1. **Proposal Cover Sheet.** The first page of the proposal must use the Proposal Cover sheet as per Attachment 1. This section does not count against the page limit above.
2. **Capability Statement:** Please provide a maximum one (1) page description of offeror's capabilities that qualify the offeror to be chosen to conduct the scope of work. Registration documentation may be requested from the successful bidder.

3. **Past Performance.** Please describe the offeror's previous experience within the technical area for projects of the same or similar scope and size. Offerors must include details demonstrating their experience and technical ability. This section should be no more than two (2) pages.
4. **CV of Principal Investigator.** Please submit the CV of the Principal Investigator. This section does not count against the page limit above.
5. **References.** Offeror shall list at least three major contracts it has held over the past five (5) years for the same or similar work. This section should be one (1) page. Please provide the following information for each contract:
 - a. Customer's name, address, and telephone numbers of customer's lead contact and technical personnel;
 - b. Contract number and type;
 - c. Date of the contract, place(s) of performance, and delivery dates or period of performance;
 - d. Contract size and dollar value;
 - e. Brief description of the work, including responsibilities;
 - f. Comparability to the work required under this solicitation;
 - g. Brief discussion of any technical problems and their resolutions;
 - h. Brief discussion of any terminations (partial or complete) and the type (convenience or default) as well as any show cause notices or cure notices (provide explanatory details).
6. **Technical Proposal.** Please provide an explanation of how the offeror understands the task, and how the offeror will complete the task (including activities and deliverables) as described in Section III. This section should be no more than two (2) pages.
7. **Cost Proposal.** Please refer to cost specification for each of the tasks, below. Please include a detailed budget that reflects clearly the costs necessary to implement the proposed consultancy and must include all taxes that are required to provide the services requested. Costs should be represented in US dollars. No profit, fees, taxes, or additional costs can be added after award. The cost proposal must be valid for at least 90 days. The cost proposal should include detailed notes that thoroughly explain the estimating methodology used to calculate the budget and any assumptions that may be made by the offeror over and above the ones stated in this RFP that had a material effect on the resulting proposed cost. Offerors must clearly explain the basis of costs, meaning why and how Offerors are costing out certain figures for item or service, to establish reasonableness of costs. The notes should include a clear and thorough explanation for each budgeted line item, reflecting the rationale for the quantity required. If a proposed benefit (e.g., local fringe) is an all-inclusive rate, notes must specify what benefits are included in the proposed rates. Offeror should include additional supporting budget documentation as necessary, such as historical cost information, to substantiate all proposed costs.

Task 1 Cost Proposal Notes: Pact anticipates that Task 1 will require no more than 20 days of effort. For this reason, Task 1 proposals should submit a budget consisting of the daily rate(s) of offeror consultant(s).

Task 2 Cost Proposal Notes: Offeror should propose the number of days required to complete this task, as well as the daily rates of proposed methodologist(s). Pact anticipates that Task 1 will require no more than 15 days of effort.

Pact may require additional, more detailed budget information prior to issuing a contract.

Certifications: Offerors responding to this RFP must include the following disclosures and certifications as part of the proposal submission in an annex to the cost proposal.

1. Disclose any close, familial, or financial relationships with Pact or project staff. For example, if an offeror's cousin is employed by the project, the offeror must state this.
2. Disclose any family or financial relationship with other offerors submitting proposals. For example, if the offeror's father owns a company that is submitting another proposal, the offeror must state this.
3. Certify that the prices in the offer have been arrived at independently, without any consultation, communication, or agreement with any other offeror or competitor for the purpose of restricting competition.
4. Certify that all information in the proposal and all supporting documentation are authentic and accurate.

Submission of Proposals: The deadline for submission of proposals is August 1, 2024.

Submissions must be forwarded in electronic format only (either PDF or Microsoft Word and Excel) to Lauren Serpe (lserpe@pactworld.org). Questions received by July 24, 2024, will be compiled, and all answers shared on Pact's procurement page, which will be shared with each questioner. Offeror's proposals should not contain any unnecessary promotional material or elaborate presentation formats (black and white is preferred). Offerors must not submit zipped files. Those pages requiring original manual signatures should be scanned and sent in PDF format as an email attachment. Please reference the RFP Number and RFP Name in the e-mail subject line. Offerors are responsible for ensuring that their offers are received in accordance with the instructions stated herein. Late offers may be considered at the discretion of Pact. Pact cannot guarantee that late offers will be considered.

V) Evaluation Criteria

The award will be decided on Best Overall Value as determined by a Selection Committee on the basis of the criteria set forth below, as demonstrated in the Offeror's proposal. Only proposals conforming to the solicitation requirements will be considered. Each proposal will be evaluated and scored against the evaluation criteria and expectations below, which are stated in the table below.

| Evaluation Criteria | Expectations | Score |
|-----------------------------------|---|--------------|
| Capabilities and Past Performance | Offeror has the demonstrated ability to perform the task. | 50 |
| Budget | Cost competitiveness of detailed budget | 15 |
| Technical Approach | Offeror outlines a clear and reasonable approach to completing the task in the timeframe of the activity. | 35 |
| | TOTAL AVAILABLE POINTS | 100 |

V) Review Process

Pact will establish a selection committee that includes representatives from various company departments and external professionals if necessary. All technical reviewers will be subjected to a screening process to eliminate any conflict of interest. Evaluation will be based on the criteria set forth in Section IV. Evaluation Criteria.

VI) Terms and Conditions

Disclaimers

- Pact reserves the right to modify by written notice the terms of this solicitation at any time in its sole discretion. Pact may cancel the solicitation at any time
- Pact may reject any or all proposals received.
- Issuance of solicitation does not constitute award commitment by Pact.
- Pact reserves the right to disqualify any application based on applicant’s failure to follow solicitation instructions.
- Pact will not compensate applicants for their response to the solicitation.
- Pact reserves the right to issue an award based on initial evaluation of applications without further discussion.
- Pact may choose to award only part of the scope of work in the solicitation or to issue multiple awards the scope of work.
- Pact reserves the right to waive minor proposal deficiencies that can be corrected prior to award determination to promote competition.
- Pact may contact offerors to confirm contact person, address, and that the proposal was submitted for this solicitation.
- Pact may contact listed past performance references without notice to the offeror. Pact also reserves the right to contact other past performance information sources that the offeror did not list in the proposal.
- By submitting a proposal, the offeror confirms they understand the terms and conditions.
- Information pertaining to and obtained from the Offeror as a result of participation in this solicitation is confidential. The offeror consents to the disclosure of the documents

submitted by the offeror to the reviewers involved in the selection process. Please note that all reviewers are bound by non-disclosure agreements.

Attachment 1: Proposal Cover Sheet

Instructions: Please fill in the information requested **highlighted in yellow** below. This page should be the first page in your Technical Proposal Submission and in your Cost Proposal Submission.

| | | |
|--|-----------------------|--|
| Project RFP No.: | | RFP Number |
| RFP Title: | | The title of the activity of the RFP |
| Submission Date: | | Month/Day/Year -Time AM/PM – Time Zone |
| Internal Proposal Number | | (for vendor use if applicable) |
| Anticipated Performance Start Date | | Month/Day/Year |
| Offeror Contact information | Name | Insert here |
| | Title | Insert here |
| | Email | Insert here |
| | Phone | Insert here |
| | Address | Insert here |
| | UEI # | Insert here |
| | Type of Entity | Insert here |
| Persons authorized to negotiate for Offeror | | Insert Name, title, and contact information |
| Total Cost Proposed | | Insert total cost here |
| Total Pages submitted (include all annexes) | | Insert total pages here |
| Offeror Agreement | | |
| By signing this document, Offeror hereby certifies to the accuracy and completeness of all pricing information, technical data, delivery dates, representations and certifications included in their offer as well the acceptance of all of the terms and conditions set forth in the RFP/Solicitation. The Offeror confirms that all prices and delivery dates shall be valid for a period of ninety (90) days following the anticipated performance start date stated above, unless otherwise clearly specified by Offeror. | | |
| Signature: | | |
| Name and Title: | | |

Date: