

To: Offerors

Date: October 1, 2020

From: Procurement and Partnerships Team, INVEST Project; Implemented by DAI Global LLC

Subject: Request for Proposals (RFP) INVEST-067: W-GDP Grand Challenge: Women Enabled in the Economy “Whole System in a Room” Partner

Due: 12:00pm Eastern Daylight Time (EDT) on **October 29, 2020**

Dear Offerors:

Enclosed is a Request for Proposals (RFP) to support the implementation of DAI’s INVEST project funded by the United States Agency for International Development (USAID). DAI invites organizations and consortia to submit a proposal for work under the Women’s Global Development and Prosperity (W-GDP) Initiative, which will launch the W-GDP Grand Challenge through the W-GDP Fund at USAID.

- I. **RFP Process and deadlines:** This solicitation will result in the award of a firm fixed price purchase order or subcontract. We anticipate issuing a single subcontract award expected to be between \$100,000 and \$200,000.
 - a. Submission of Questions – Questions must be submitted no later than **12:00pm EDT on October 8, 2020** via email to INVEST_Procurement@dai.com. DAI will respond to these questions in approximately one to two (1-2) business days.
 - b. Submission of Proposal – Proposal must be submitted no later than **12:00pm on October 29, 2020** via email to INVEST_Procurement@dai.com, copying Katherine_Tilahun@dai.com and Matthew_Mitchell@dai.com. The subject line of the email should be your organization name, followed by “Submission under RFP INVEST-067: W-GDP Grand Challenge: Women Enabled in the Economy.” Please certify in your submission email a validity period of 60 days for the price(s) provided and include your organization’s DUNS number. Please limit file submissions to 10 megabytes or less. Proposals must be submitted in English.

- II. **Composition of Proposal:** The proposal should comprise the following submission documents. The Technical Proposal and Price Proposal should be prepared as separate files for independent evaluation, as follows below. Technical proposals should be submitted as a ten (10) slide presentation, using 12-point standard font size. Graphics may be included, so long as text is clearly legible. If text or graphics are of poor resolution, the information provided may be excluded from consideration. Submissions in PowerPoint or PDF are acceptable, although PDF is preferred along with an accompanying PowerPoint document. Please provide a copy of your price proposal in Excel format; offerors should use their own budget templates.

Part 1 – Technical Proposal

The technical proposal is composed of the following three (3) sections:

1. **Technical Approach** – Offerors will detail their approach to fulfilling the accompanying Statement of Objectives (SOO) in ONE of the following countries:

- Colombia
- Peru
- El Salvador*
- Guatemala*
- Honduras*
- Ecuador
- Indonesia
- Philippines
- Vietnam

*These countries can be addressed separately or as one region.

The approach will clearly indicate how the proposed activities will result in the successful completion of all deliverables and activities. Proposals should provide rationale for why the enabling environment in the selected country (one country from the list above) is best positioned for success in reducing discriminatory norms and implementing specific reforms that enable women’s access to commercial finance within the timeframe stipulated in the Statement of Objectives.

2. **Institutional Capacity** – Please provide details about the experience, expertise, or capacity of your firm to implement the proposed approach and complete the work as described. This should also include past performance information for similar activities that engage a diverse set of stakeholders for collective action, including case studies or examples of collective action/impact initiatives facilitated by your firm and/or diverse stakeholder engagement leading to actionable reforms/activities, the engagement methods that were used, what worked well, and any challenges your firm has faced, as well as ways your firm has troubleshooted and overcome those challenges. Offerors should include details of their experience with and understanding of the challenges and opportunities for women’s access to commercial finance in the selected country. As the workshop is likely to take place virtually, please include any virtual platforms used and benefits and disadvantages of the platform.
3. **Management Plan/Staffing Structure** – Offerors should include details of personnel who will be assigned to activities as proposed in the technical approach, as well as a clear management plan for the development, review, and submission of all associated deliverables, including a milestone schedule. The management plan should address how offerors will engage with the steering committee through the preparation, implementation, and follow-up of the workshop. Offerors are permitted to engage in partnering arrangements (for example, a lead convening organization, and a local facilitation partner) if it will aid in providing best value to USAID. If a partnering

arrangement is being proposed, please describe the nature of the arrangement, the specific technical value being contributed by each member of the team, and the appropriate management controls to ensure successful delivery. Firms may consider partnership with other firms that bring in complementary skill sets and experience. We do not anticipate that all firms will have all the relevant experience and expertise needed, so we value partnerships where appropriate.

In addition to the above, please include the following inputs, which will not be counted as part of the 10-slide limit and format may be PDF or Word:

- Two (2) examples of past performance relevant to this activity (limited to two (2) pages per example)
- CV(s) of any individuals proposed in the staffing plan to conduct this activity (limited to two (2) pages per individual).

A cover page will be considered a non-counting page, should offerors choose to include one. No additional annexes or documentation are requested nor should be submitted.

Part 2 – Price Proposal

The contract type for the presumptive work will be fixed price, awarded as a purchase order or subcontract by DAI Global, LLC. Please include your total proposed fixed price along with details for specific deliverable pricing. Offerors should breakdown each deliverable's associated costs, including all labor and non-labor costs according to expected levels of effort to accomplish each deliverable according to the objectives as laid out in the SOO. Offerors should use their own budget templates, submitted in Excel format. To complement the budget in Excel format, offerors should submit a budget narrative, which outlines all underlying assumptions around cost buildups for deliverable pricing (no more than 2-3 pages). Please note that if you are selected as the apparently successful offeror and DAI begins negotiations for the subcontract, then your firm will be asked to submit to DAI backup justification documentation for all labor and non-labor costs included in the budget. Please limit file submissions to 10 megabytes or less.

III. Evaluation of Proposal: DAI will use best value determination for the award of this Request for Proposals. A best value determination means that, in DAI's estimation, the selected offer will provide the greatest overall benefit to USAID in response to the requirements stated in this RFP. DAI may also exclude an offer from consideration if it determines that an Offeror is "not responsible", i.e., that it does not have the management and financial capabilities required to perform the work required. DAI reserves the right to check the past performance, references, and other pertinent offeror information in making award decisions. Proposals will be evaluated against a stated number of factors including: the overall proposed approach, rationale for country selection, past performance, specific qualifications in the identified approach and sectors, and other evidence substantiating the bidder's ability to deliver, including budget and time frame considerations.

1. Technical Proposal: The Technical Proposal will be scored and evaluated separately from the cost proposal. Technical panel reviewers will evaluate offerors on the

following factors, consistent with the offerors' technical proposal. The Technical Proposal will be evaluated against the following criteria:

- a. **Technical Approach (40 Points):** Points for this section will be awarded based on the information presented in the technical approach. The offeror will be scored based on its presentation of a clear approach which reflects the requirements of this specific activity but also incorporates the offeror's competencies. Points will be given for the following technical areas:
 - i. Technical approach clearly indicates how the proposed activities will result in the successful completion of all deliverables and activities in the selected country, including the delivery of a whole system in the room workshop, realistic and achievable action plan(s), and full workshop report. (15 points)
 - ii. Proposed technical approach reflects familiarity with and understanding of facilitating collective action and incorporates relevant technical experience in researching/ developing/ implementing engaging, participatory, and responsive workshop sessions considering diverse participants from across the selected country. (10 points)
 - iii. Proposed approach demonstrates understanding of the existing barriers and opportunities for reforms in the selected country, and knowledge of the broad system of stakeholders to be engaged. The proposed approach addresses how a broad and inclusive range of stakeholders will be identified and engaged to strengthen stakeholder relationships and build local leadership. (10 points)
 - iv. The proposal employs accessible technology applications and/or platforms that allow for virtual workshop implementation and collaboration, demonstrates the ability to troubleshoot/mitigate potential technological challenges, and proposes methods for sustained communications among local actors after this activity. (5 points)
- b. **Institutional Capacity (30 Points):** Points for this section will be based on information presented in the corresponding section. The offeror should demonstrate their:
 - i. Experience in designing and implementing workshops/events that convene and engage a diverse set of stakeholders for collective action, focusing on participant-driven discussions to build a shared vision, increase local ownership, ensure accountability, and strengthen local networks. (12 points)
 - ii. Experience and understanding of collective action to address policies, social norms, and practices to positively impact an enabling environment, with particular focus on issues of women's access to financial services in the selected country. Prior experience improving the enabling environment for women's access to finance should be highlighted. (12 points)
 - iii. Demonstrated experience facilitating virtual workshops/events in the local language and selected country, and producing

professional materials used for online workshops/events. (6 points)

- c. **Management Plan / Staffing Structure (30 Points):** Points for this section will be based on the qualifications of proposed staff, clear delineation of the roles and responsibilities of each proposed staff and each proposed firm (if firms are partnering), and the demonstrated efficacy and clarity of the management plan. Proposals should provide a clear management plan in narrative form for the development, review, and submission of all associated deliverables, including a proposed milestone schedule. If the offeror is submitting a proposal with partners, the proposal should describe the nature of the arrangement (i.e. added technical value), the division of labor among the partners, and the appropriate management controls to ensure successful delivery. The offeror should clearly demonstrate the:
- i. Management plan for proposed activities, including clearly defined technical roles and delineation of responsibilities for each proposed staff and partner firm (if applicable). (10 points)
 - ii. Qualifications and experience of staff to assess and deliver high quality facilitation leading to collective action, including those with experience addressing women's access to commercial finance or working with groups that include similar participants to those anticipated in this workshop. (10 points)
 - iii. Timeline and deliverables that will result in objectives of SOO being met. (5 points)
 - iv. Advanced proficiency in both the local language and English to allow for effective communication with local stakeholders, USAID/INVEST staff, and translation of workshop materials from English to local language. (5 points)

2. **Price Proposal:** Price and associated cost build-up will be evaluated separately from the technical approach, with due consideration for realism, price reasonableness, and allowability consistent with US government cost principles. Evaluation for this section will be dependent upon all information presented by the Offeror in their deliverable table and supporting cost information, as well as its alignment with the proposed technical approach.

IV. Offeror's Agreement with Terms and Conditions: The completion of all RFP requirements in accordance with the instructions in this RFP and submission to DAI of the technical and price proposals will constitute an offer and indicate the Offeror's agreement to the terms and conditions in this RFP and any attachments hereto. DAI is not required to accept and/or evaluate proposals that do not conform to the instructions of the RFP, and additionally, DAI may reject all proposals and not award a subcontract for this RFP. DAI reserves the right to award a subcontract without discussion and/or negotiation; however, DAI also reserves the right to conduct discussions and/or negotiations, which among other things may require an Offeror(s) to revise its proposal (technical and/or price). By submitting an offer, Offerors agree to comply with the general terms and conditions for an award, including [Representations and Certifications](#) compliance. Offerors must provide full, accurate, and complete information in response to this solicitation. By submitting an offer, Offerors certify that they have not/will not attempt to bribe or make any payment to DAI employees in return for preference. Issuance of this RFP in no way obligates DAI to

award a subcontract, nor does it commit DAI to pay any costs incurred by the Offeror in preparing and submitting the proposal. DAI reserves the right to award a subcontract to one organization or to issue multiple awards to different organizations based on the results of our evaluation.

Thank you,
DAI INVEST Procurement and Partnerships Team
INVEST_Procurement@dai.com

**Statement of Objectives under RFP INVEST-067:
W-GDP Grand Challenge: Women Enabled in the Economy
Whole System in a Room Partner**

Introduction

Through INVEST, USAID seeks to unlock the potential of private capital to drive inclusive growth in countries around the world. Increasingly, private investors and businesses are looking to emerging markets for better returns and new market opportunities. Encouraging investment in high-impact areas important to USAID such as agriculture, financial services, infrastructure, energy, clean water, health, and education, requires new forms of collaboration between USAID and the investment and business community.

Under the Women's Global Development and Prosperity (W-GDP) Initiative, INVEST will support the launch of the W-GDP Grand Challenge to advance effective approaches to increase women's economic power. The W-GDP Grand Challenge's first round, Women Enabled in the Economy, will convene host governments, private-sector partners, donor governments and organizations, non-governmental organizations, other stakeholders, and women themselves to build a stronger and more inclusive enabling environment for women.

The White House-led W-GDP Initiative is the first whole-of-government approach focused on advancing women's full participation in the global economy. The Initiative established the W-GDP Fund at USAID, now in its second year. W-GDP focuses on three pillars: 1) Women Prospering in the Workforce, 2) Women Succeeding as Entrepreneurs, and 3) Women Enabled in the Economy. Under the W-GDP Fund, the W-GDP Grand Challenge will mobilize governments, companies, civil society organizations, and donors, building a coalition of private and public partners to inspire collective action, pilot ideas, and scale viable approaches to increase women's economic power globally.

Background

A strong enabling environment is the most transformative force for women's economic empowerment. Without a positive enabling environment, the advancement of women is limited by external factors. Broadly defined, the enabling environment for women in the economy encompasses the legal and regulatory framework, policies and practices (public and private sector), and social norms that support women to operate in the formal economy. These barriers range from disproportionate burdens of unpaid care, gender-based violence, underinvestment in their education, need for spousal approval for employment, and legal barriers to participate in certain professions. In some cases, enabling laws and policies may exist, however women's economic empowerment remains limited by restrictions to access and agency. Women may face social or cultural barriers in accessing financial services, lack access to networks of commercial finance providers, or have limited agency and decision-making power over financial resources. The impact of these barriers is also wide-reaching, affecting multiple sectors with a wide variety of causes and many solutions. Strengthening the enabling environment for women requires reducing, leapfrogging, or overcoming these barriers and implementing or strengthening protective and proactive legal structures, policies, and frameworks that help women prosper in the economy.

Examining legal barriers specifically, W-GDP is focusing its efforts on five foundational factors that include women's ability to access institutions, build credit, manage property, travel freely, and work in the same sectors and jobs as men.

1. **Accessing Institutions:** Reduce restrictions on women’s authority to sign legal documents such as contracts and court documents. Address unequal access to courts and administrative bodies for women, whether officially or through lack of proper enforcement.
2. **Building Credit:** Ensure women’s equal access to credit and capital to start and grow their businesses. Prohibit discrimination in accessing credit by sex or marital status.
3. **Owning and Managing Property:** Lift restrictions for women on owning and managing property, including limitations on inheritance and the ability to transfer, purchase, or lease property.
4. **Traveling Freely:** Address constraints on women’s freedom of movement, including restrictions on obtaining passports.
5. **Removing Restrictions on Employment:** Remove restrictions that limit women’s working hours, occupations, or tasks.

The **W-GDP Grand Challenge: Women Enabled in the Economy** aims to increase women’s access to commercial finance by mobilizing governments, companies, foundations, research institutions, civil society, development agencies, and women impacted by these barriers to take collective action to challenge discriminatory norms; reform restrictive laws, policies, and practices; and/or implement existing inclusive laws, policies, and practices. By bringing together high-profile stakeholders and on-the-ground actors necessary for making a difference in women’s prosperity, these stakeholders will elevate the specific needs of women, propose feasible solutions, jointly develop one or several action plans, coordinate activities to deliver against the action plans, and follow-through with effective implementation of those activities to increase women’s access to commercial finance. The first phase of the W-GDP Grand Challenge: Women Enabled in the Economy will focus on convening a variety of organizations and stakeholders to create viable action plans, while the second phase -- anticipated to take place over a period of 18-20 months -- will focus on identifying and supporting activities related to the implementation of the action plans to increase women’s access to commercial finance.

Objective

DAI is seeking a partner to support the first phase of the W-GDP Grand Challenge: Women Enabled in the Economy, to be implemented in ONE of the following countries:

- i. Colombia
- ii. Peru
- iii. El Salvador*
- iv. Guatemala*
- v. Honduras*
- vi. Ecuador
- vii. Indonesia
- viii. Philippines
- ix. Vietnam

*Offerors may address these countries as one region.

The partner will conduct initial research to both identify the barriers associated with women’s access to commercial finance and the relevant stakeholders in the system so that they might convene a workshop, using a Whole Systems in a Room (WSR) approach.¹ Under the WSR approach, a diverse group of stakeholders² will identify, analyze, and prioritize the implementation of reforms that lower barriers to

¹ For additional information on the Whole Systems in a Room approach, see “Annex 1” on page 7.

² In the WSR Approach, a steering committee is key in defining the workshop to include bottom-up and top down actors.

women's access to commercial finance and build a stronger enabling environment for everyone, with a disproportionately positive impact on women. The partner will engage various stakeholder groups and form a representative steering committee that will research, design, plan, and implement a virtual workshop to convene the whole system of actors to (1) develop joint understanding of the problem/challenge to women's access to commercial finance; (2) review, analyze and clarify existing efforts and activities to address the problem/challenge; (3) jointly identify key areas for collective action (including both new areas and identifying opportunities to reform current practices); and (4) create a viable action plan(s) to reduce discriminatory norms and implement specific reforms to increase women's access to commercial finance.

Activities

Under this Statement of Objectives, the Partner will research, design, prepare, implement, and follow-up to a virtual workshop³ that will convene a diverse range of key stakeholders to form a collective voice and create one or more action plans to increase women's access to commercial finance.

Research, Design, and Prepare

To develop an in-depth understanding of the stakeholders involved with women's access to commercial finance and their relationships to each other, the partner will conduct rapid research, which would involve desk research, systems mapping and analysis. The research should establish boundaries around the financial system, note how and where current players are active in providing women access to finance, identify existing resources, as well as identify new partners and resources. Following the rapid research, the partner will engage key stakeholders to form a Steering Committee and inform the design and preparation of the workshop to ensure diverse representation of the system of actors.

The workshop should be designed with a clear purpose, well-defined issues, and expected outcomes, so that participants recognize the value and benefit of convening with diverse, local actors to define common goals to reduce discriminatory norms, implement reforms to increase women's access to commercial finance, and commit to collective action.

The partner will structure the workshop to be inclusive, strengthen stakeholder relationships and networks, and build local leadership. The partner will ensure that the workshop activities are engaging, structured to encourage participation, and accessible for all identified participants. To ensure participation is both broad and inclusive, potential participants may have the opportunity to express interest using an existing tool and platform for the W-GDP Grand Challenge. While the size and structure of the workshop will be proposed by the partner, it is anticipated that a breadth of stakeholder groups should be represented, with the number of participants ranging from 60 to 120. It is anticipated that the workshop will take place in accordance with country and local health guidelines. The partner should propose how they will coordinate agile communication and relationship building with stakeholders during and after the workshop, for example via a limited access web-based platform, social media page, and/or SMS messaging group. The partner will develop the agenda and activities for the workshop and invite identified participants, providing materials and context to prepare stakeholders to work together to create actionable plans to reduce discriminatory norms, reform laws and policies, and/or implement existing inclusive laws and policies.

Implement

The partner will hold the workshop to develop joint understanding of the barriers facing women and together define common goals. The workshop will present the research, solicit feedback, and lay the

³ Given the COVID-19 pandemic, the workshop and related activities will likely be conducted virtually; however, this could change should conditions and country health guidelines be favorable for some in-person engagement.

groundwork for collective action towards reducing discriminatory norms, reforming laws and policies, and/or implementing existing inclusive laws and policies, to increase women's access to commercial finance by building commitment to a common action agenda and encouraging various stakeholders to share resources, integrate plans, and improve information flow.

Participants will develop action plans in support of the workshop goals as they identify, analyze, and prioritize activities to address short- and medium-term milestones, emphasizing local ownership. Through the development of action plans, stakeholder groups will strengthen communication, improve relationships, build networks, and create frameworks for mutual accountability in delivering against the action plans. Each action plan should define relations and clear measures of success.

The partner will provide logistics and facilitation support for the workshop, ensuring that participants can fully engage with each other. This may include working with a local facilitation partner, employing methodologies and activities that maximize virtual engagement, technical support and troubleshooting for participants, or adaptations and adjustments to the format based on participant feedback, facilitator observations, prior session outcomes, and USAID input. The partner should clearly state whether it intends to use internal capacity to facilitate the workshop or whether it intends to supplement its capabilities with a local facilitation partner (and provide detail on how they will complement each other).

To result in actionable plans, the workshop should be well documented to showcase collaboration, gather lessons from the convening of stakeholders, and capture action plan(s) that emerge from the workshop. This may include videos, interviews, visual note taking, etc., which may continue to be used after the workshop.

Follow-up

After the workshop, the partner will continue to engage workshop groups to refine action plan(s), ensuring alignment with the common goals and priorities identified during the workshop. The partner may conduct additional research, validation, and socialization activities to refine the action plans and ensure they are poised for success. The action plans should include both short- (six months) and medium-term (up to 20 months) goals, with realistic milestones and results that can be achieved in that timeframe. As needed, the partner will share resources and information, such as highlights from the workshop, with workshop participants or across the broader system of local actors. INVEST will provide further guidance to the partner and to participants regarding next steps with the action plans.

The partner should include in their proposal an outline of their follow up approach, including how momentum will be maintained post workshop. The partner will also submit a final report which documents the design and implementation of the workshop, stakeholder engagement in the design, an overview of the system, workshop materials, insights from the convening of stakeholders, and recommendations to implement collective action through the action plan(s).

Timeframe

The Partner should begin design and preparation immediately upon award, with the workshop scheduled for early December 2020 and action plan(s) will be finalized by January 2021. Note that the duration of this activity is compressed to allow time for the implementation of activities identified from the action plan(s).

Activities and Deliverables

Illustrative Activities and Deliverables	Proposed Timeline
Participation in kick-off meeting with INVEST and USAID and summary notes from call including finalized work plan and timeline with recommendations and best practices for developing a steering committee and facilitating multi-stakeholder collaboration virtually.	Upon contract execution
Background research with stakeholder and system mapping.	1 week from contract execution
Develop a diverse steering committee to draft the workshop agenda and materials, including adaptation and translation of workshop materials into the local language.	2 weeks from contract execution
Workshop information packet with any workshop materials (e.g., participant information, IT logistical guides, background reading)	4 weeks from contract execution
Orientation webinar/presentation rehearsal with participants	5 weeks from contract execution
Virtual multi-stakeholder collaboration workshop delivery	Starting 5 weeks from contract execution
Workshop outputs including all videos, photos, graphic notetaking captures, images, and other workshop collateral collected during the event	2 weeks after workshop completion
Workshop report including proposed action plans, overview of process and activities, next steps, the outputs, and recommendations maintaining momentum	December 2020
Continued engagement with participants to strengthen stakeholder relationships and support the initial alignment of action plans	January – March 2021

Period and Place of Performance

This activity is expected to take place over a period of approximately five (5) months from November 2020 to March 2021. It is anticipated that the work will take place in ONE of the countries below and remotely⁴.

- i. Colombia
- ii. Peru
- iii. El Salvador*
- iv. Guatemala*
- v. Honduras*
- vi. Ecuador
- vii. Indonesia
- viii. Philippines
- ix. Vietnam

*These countries can be addressed separately or as one region.

⁴ Given the COVID-19 pandemic, the workshop and related activities will likely be conducted virtually; however, this could change should conditions and country health guidelines be favorable for some in-person engagement.

Annex 1.

Additional Information on Whole Systems in a Room Approach

The Whole-System-in-a-Room concept is an established methodology for participatory analysis and decision making that engages participants from a variety of sectors within a particular system to create a common understanding of the system and jointly define common goals within the system. With common goals, participants can identify, prioritize, and commit to actions to work towards the goals. Below are publicly available resources:

- [Whole System in the Room Strategizing Tools](#): Includes checklist; worksheets; and sample agenda and letters
- [The Kachin Drug Epidemic](#): USAID/Myanmar's Systems Approach to Advancing Locally Led Development