



Note: Due to COVID-19, the USAID/Mexico co-creation workshop has shifted from an in-person event to a completely virtual program. As a result, this procurement is adhering to an abbreviated time frame.

To: Offerors

Date: March 24, 2020

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

Subject: Request for Proposals (RFP) INVEST-041: USAID/Mexico Online Co-Creation Workshop Facilitation Partner

DUE: 5:00PM Eastern Daylight Time (EDT) on **April 3, 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 firms to submit a proposal for work as designated by USAID/Mexico.

- I. RFP Process and deadlines:** This solicitation will result in the award of a fixed price purchase order. We anticipate issuing a single purchase order award resulting from the implementation of this agreement.
- a. Submission of Questions – Questions must be submitted no later than **5:00 pm EDT on March 26, 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 **5:00 pm EDT on April 3, 2020** via email to INVEST_Procurement@dai.com, copying Katherine_Tilahun@dai.com, Matthew_Mitchell@dai.com, and Talin_Baghdadlian@dai.com. The subject line of the email should be your organization name, followed by “Submission under RFP INVEST-041: USAID/Mexico Online Co-Creation Facilitation Partner”. 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:** Your organization's proposal should comprise the following submission documents. The Technical Proposal and Cost Proposal should be prepared as separate files for independent evaluation, as follows below. Technical proposals should be submitted as a Word document of no more than three-four (3-4) pages, 12-point font minimum. Submissions in Word or PDF are acceptable, although PDF is preferred along with an accompanying Word document. Please provide a copy of your cost proposal in Excel format.

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). The approach will clearly indicate how the proposed activities will result in the successful completion of all deliverables and activities. Please include suggestions on which technology platforms you suggest using and why as well as what functionality you would use and how, including references to previous work conducted for an online co-creation workshop or similar activity. Please include how you would design and facilitate activities online to stimulate and support collaboration and creativity among diverse participants, including illustrative examples as well as potential challenges and how to address them.
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 online activities, including case studies or examples of online workshops and/or co-creations facilitated by your firm, the virtual platforms that were used, their features that have worked well, and challenges your firm has faced on these platforms as well as ways your firm has troubleshooted and overcome those challenges.
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. Offerors are permitted to engage in partnering arrangements if it will aid in providing best value to USAID, regardless of whether organizations belong to the USAID INVEST partner network. 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.

In addition to the above, please include CV(s) of any individuals proposed in the staffing plan to conduct this activity. CV(s) will not be counted as part of the five-page limit and the format may be PDF or Word.

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 – Cost Proposal

The contract type for the presumptive work will be fixed price, awarded as a purchase order 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 level of efforts to accomplish each deliverable according to the objectives as laid out in the SOO. 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 purchase order, 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. Proposals will be evaluated against a stated number of factors, including the overall proposed approach, past performance, specific qualifications in the identified 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 (25 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, including the delivery of an online co-creation workshop, facilitation guide for virtual workshops, workshop summary brief, and full report.
 - ii. Proposed technical approach reflects familiarity with and understanding of the co-creation process and incorporates relevant technical experience in developing/implementing engaging, participatory, and responsive workshop sessions considering the international nature and internet connectivity of participants from across Mexico and potentially abroad. The proposal also includes a discussion of potential challenges that may arise due to the online nature of this workshop and proposed mitigation strategies.
 - iii. Proposed approach reflects the blended finance/promoting sustainable landscapes and reducing deforestation focus of the workshop and demonstrates offeror's understanding of how to engage a mix of community and natural resource management and financial sector actors, development organizations, donors, Government of Mexico and other entities.
- b. **Institutional Capacity (40 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 facilitating online co-creations and/or facilitating online learning workshops, events, and trainings that center on building a shared vision with a wide variety of participants.

- ii. Capabilities designing and producing professional materials used for online co-creation workshops and/or trainings.
 - iii. Demonstrated experience facilitating online workshops in Spanish.
 - iv. Experience designing and facilitating online workshops that engage all participants and encourage all participants' participation.
- c. **Management Plan / Staffing Structure (35 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 demonstrate their proposed staff's:
- i. Management plan for proposed activities, including clearly defined technical roles and delineation of responsibilities for each proposed staff and partner firm (if applicable).
 - ii. Timeline and deliverables that will result in objectives of SOO being met.
 - iii. Qualifications and experience of staff to assess and deliver high quality online facilitation, including those with experience facilitating groups that include similar participants to those anticipated in this workshop.
 - iv. Native or fluent Spanish language proficiency (speaking, writing, and reading), as the workshop will be facilitated in Spanish.
 - v. Advanced English language proficiency, for communication with non-Spanish speaking USAID/INVEST staff and for translating workshop materials from English to Spanish.
2. **Cost Proposal:** Cost 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-041:
USAID/Mexico Online Co-Creation Workshop Facilitation Partner

Introduction

Through INVEST, United States Agency for International Development (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 requires new forms of collaboration between USAID and the investment and business community.

The USAID Mexico Mission has engaged INVEST to support its sustainable landscapes programming to seek partners to research, develop, test, and evaluate innovative approaches to increase access to finance and catalyze investments to reduce deforestation and forest degradation in Mexico by improving land management practices and reducing the drivers of land-use change.

Background

USAID/Mexico has issued a call for expressions of interest¹ (EOIs) to identify potential partners and innovative approaches that leverage USAID resources in support of blended finance approaches to promote sustainable landscapes and reduce deforestation in Mexico. Due to the health and safety concerns over the unfolding COVID-19 pandemic, the co-creation workshop, originally planned to be held in-person in Mexico City, will now take place as a virtual event. Due to this recent development, efficient design, adaptation and agile online facilitation is required. Organizations from diverse sectors—including finance, investment, agriculture, forestry, conservation and rural development, among others—will be selected by USAID from EOI applicants in early April and invited to participate in an online co-creation workshop planned for late April. This virtual workshop will build on the momentum of green finance to advance key development objectives and will use the workshop to collectively design solutions that leverage USAID resources to catalyze systemic change in service of USAID/Mexico objectives.

Objective

DAI is seeking a Facilitation Partner to support USAID and INVEST in the facilitation of the online co-creation workshop. The Facilitation Partner will enable a successful online co-creation workshop that is well-organized and facilitated, and that engages participants to work together creatively, productively, and efficiently to: (1) develop joint understandings of the problem/challenge; (2) review and clarify existing efforts and activities to address the problem/challenge; (3) identify key areas for collaborative action; and (4) agree on a basic framework for action and next steps, providing guidance to participants on developing concept papers that outline potential partnership to research, develop, test and evaluate innovative approaches to increase access to finance and catalyze investments to reduce deforestation and forest degradation in Mexico by improving land management practices and reducing the drivers of land-use change.

It is anticipated that 20-30 organizations with two participants each selected from those submitting EOIs, along with USAID and INVEST staff, will participate virtually in the workshop, making the total number of participants around 60-70 individuals. Invited experts, partner donor organizations, and government representatives may be invited to participate in some workshop sessions. A diverse group of participants is expected to come together to explore the challenges faced by rural communities, *ejidos*, community forest

¹Blended Finance Approaches to Promote Sustainable Landscapes and Reduce Deforestation in Mexico: <https://www.grants.gov/web/grants/view-opportunity.html?oppId=324896>

enterprises, timber and agricultural enterprises, financial institutions, investors, and others to promote sustainable landscapes and reduce deforestation. The objective is to co-create a strategy for how best to employ blended finance solutions to overcome challenges and unlock value in sustainable and regenerative agriculture, livestock, forestry enterprises, conservation and other sustainable land uses.

Following the workshop, USAID will invite participants from the online co-creation workshop to develop concept papers for funding consideration.

Activities

Under this scope of work, the Facilitation Partner will assist in the design, preparation, implementation, and follow-up of an online co-creation workshop for the USAID/Mexico activity. The Facilitation Partner will work closely with INVEST, USAID, and workshop participants during all stages of this work.

Design and Preparation:

Rapid design and preparation are required given the shift to a virtual co-creation workshop due to COVID-19 travel restrictions. During this stage, the Facilitation Partner will conduct brief background research, which could include reviewing program documents and the successful EOIs, to become familiar with the subject matter of the co-creation workshop. This will allow the Facilitation Partner to be well versed in the program objectives, the breadth and depth of experience among participants, and the motivations and incentives of the various participants to engage in this work. This background research is meant to inform the facilitation of the workshop so as to meet the program's objectives while engaging the participants in a substantive way.

USAID and INVEST will lead the design of the workshop, including the overall workshop agenda. As time allows, the Facilitation Partner will collaborate with USAID and INVEST and offer expertise in online learning facilitation and in delivering virtual trainings and workshops. The Facilitation Partner will provide feedback and revisions for the workshop structure, activities, and how best to utilize a simple, user-friendly online platform (e.g. Google Hangouts Meet, Zoom, WebEx or similar), through which to host the co-creation workshop, guidance on how to best utilize its features and capture information, and methods that promote the participation of and collaboration from all participants virtually.

The Facilitation Partner will help prepare for the workshop following the guidance from USAID and INVEST, sharing recommendations and feedback on previously designed workshop activities, and creating any required facilitation materials in Spanish and translating USAID workshop materials from English to Spanish. This could include participant agendas and pre-workshop packets, workshop tools, exercise templates, facilitation guides, breakout session guides for facilitators, participant information surveys, and others.

In addition to assisting with the preparation of the workshop content, the Facilitation Partner may support the INVEST and USAID teams in outreach and communications to the workshop participants. This might include drafting and disseminating user guides on accessing and using the online platform to participants, IT information about the event, and gathering and disseminating participant information ahead of time.

Implementation and Facilitation:

The online co-creation workshop is expected to run intermittently from April 22—30, 2020, for six half business day virtual sessions. In close collaboration with USAID and INVEST, the Facilitation Partner will lead the online workshop completely in Spanish, though English will be necessary for communication with some USAID and INVEST staff. The Facilitation Partner will keep sessions fresh and engaging and will keep driving participants to the desired output of a market-informed vision for USAID's approach to blended finance in support of USAID/Mexico and creative new partnership models that might be further developed into funded solutions. This could include running virtual breakout sessions, information-sharing

activities, icebreakers, group exercises, session recaps, pitch sessions, and other participatory methods to maintain momentum, keep participants interested and collaborating, and drive the discussions towards meaningful outcomes. The Facilitation Partner will make a special effort to ensure active participation from all participants, drawing those less inclined to participate into dialogue and solicit their thoughts.

The Facilitation Partner will assist with troubleshooting and logistics support on the days of the event to ensure that the technology and sessions run smoothly.

During the workshop, the Facilitation Partner will be expected to adapt as session topics and formats may be adjusted based on USAID input, participant feedback, facilitator/organizer observations, and prior session outcomes to ensure the event remains relevant and continues to move toward the objectives of the workshop. It is anticipated that there will be a wide range of initial ideas, grouped around a number of subject areas that may need to be prioritized with focus on those concepts showing most promise.

Coming out of the co-creation workshop, INVEST's goal is for participants to be organized around strong concepts that can be further developed and presented for procurement. Following the event, participants will have the opportunity to take the lead in developing concept papers and joining the coalitions of others. These post-workshop concept papers should detail how USAID and diverse partners can work together to effectively promote sustainable landscapes and reduce deforestation in Mexico using a blended finance approach in service of the goals of USAID/Mexico, and other information.

During and after the workshop, the Facilitation Partner will collect and analyze feedback from participants to inform on adjustments made to activities, formats, and technologies as needed as well as to evaluate what worked well and what did not and include survey results in graphic form. The Facilitation Partner should plan to capture the workshop discussions and outputs in some form, using templates for participants to fill out, capturing written outputs, using graphic recording and notetaking (real-time visual notes with hand drawn illustrations), and/or recording verbal report outs. The Facilitation Partner might also suggest additional ways to collect videos, quotes, and feedback to allow participants to collectively share their experience.

Below is a sample list of concept information the Facilitation Partner may need to capture during the workshop; please note this is for illustrative purposes based on previous co-creation workshops and is not a confirmed list for this workshop. The Facilitation Partner will work with INVEST and the USAID team to determine the critical information to be documented during the workshop and the appropriate way to capture the ideas, which could include videos, photos, template forms, questionnaires, and other ideas the Facilitation Partner proposes for ensuring everything is accurately captured.

- Concept title and participants involved
- Objectives
- Approach
- Role of INVEST / USAID
- Role of Partner(s)
- Measurement of success
- Time to impact
- Expected impact on USAID/Mexico goals

Post-Workshop Follow Up:

The Facilitation Partner will be responsible for documenting and submitting to INVEST the outputs of the online co-creation workshop. This should be in the form of a capture of all outputs including developed concepts and a workshop report on the activity. Outputs should be circulated within two days of the

workshop closing and the workshop report within two weeks. These will serve as a useful resource to participants and keep the momentum moving forward while the proposal phase is underway.

The workshop report should document the workshop process, the event itself, thoughts on how the workshop contributed to the co-creation of new approaches to support the USAID/Mexico goals, and recommendations for how the agenda or facilitation could have been more effective, especially around virtual facilitation. A brief post-workshop evaluation should be designed to capture input from the participants to ensure their experiences are represented in the comprehensive report.

All workshop outputs should be included in this workshop report in order to have one comprehensive document of the process, the content, the outputs and the learning. All of these products will be given a clear and compelling design (visualizations, imagery, layout, polish, etc.) that will allow them to be used effectively by INVEST and USAID for stakeholder engagement and building support for continuing the work identified during the workshop.

Timeframe

The duration of this activity will be compressed due to changes from an in-person to virtual workshop. It is expected that the Facilitation Partner will begin workshop preparation on or about April 15, 2020. The online workshop, including the rehearsal with participants, will be held during six half business day virtual sessions from April 22-30, 2020, and the Facilitation Partner will use the week following to draft the workshop report and finalize deliverables.

Activities and Deliverables

Illustrative Activities and Deliverables	Proposed Timeline
Background research and review/familiarization of context and co-creation themes	Upon contract execution
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 virtual facilitation	Upon contract execution
Draft agenda and activities for workshop including adaptation and translation of USAID and INVEST workshop materials from English into Spanish	1 week prior to workshop
Workshop information packet with finalized agenda for workshop, along with facilitation guides, and workshop materials (e.g., participant information, IT logistical guides, background reading)	1 week prior to workshop
Orientation webinar/presentation rehearsal with participants	April 22, 2020
6-day online workshop co-facilitation and delivery	April 24-30, 2020

Workshop outputs including all videos, photos, graphic notetaking captures, and other workshop collateral collected during the event	2 days following workshop completion
Workshop report including proposed new solutions, overview of process and activities, next steps, the outputs, and thoughts on how the workshop contributed to the co-creation of new approaches to support the USAID/Mexico goals with recommendations for how the agenda or facilitation could have been more effective	2 weeks following workshop completion