



To: Offerors

Date: October 22, 2019

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

Subject: Request for Proposals (RFP) INVEST-032: Women's Global Development and Prosperity Initiative (W-GDP) Co-Creation Workshop Facilitation Partner

DUE: 1:00PM EDT on **November 1, 2019**

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 part of the USAID Office of Gender Equality and Women's Empowerment (USAID/GenDev).

- I. RFP Process and deadlines:** This solicitation will result in the award of one or more Fixed Price subcontract(s). We anticipate issuing a single subcontract award between \$50,000-\$80,000 resulting from the implementation of this agreement.
- a. Submission of Questions – Questions must be submitted no later than **1:00 pm EDT on October 25, 2019** via email to INVEST_Procurement@dai.com.
 - b. Submission of Proposal – Proposal must be submitted no later than **1:00 pm EDT on November 1, 2019** 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-032: W-GDP Co-Creation Workshop 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.
- 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 slide deck of no more than (10) slides. Submissions in PowerPoint or PDF are acceptable, although PDF is preferred along with an accompanying PowerPoint 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.

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.
3. **Management Plan/Staffing Structure** – Offerors should include details of personnel who might 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 the following. These inputs will not be counted as part of the 10-slide limit and the format may be PDF or Word:

- One (1) to two (2) case study examples of past performance relevant to this activity (limited to two (2) pages per case study)
- CV(s) of any individuals proposed in the staffing plan to conduct this activity (limited to two (2) pages per individual)

A cover slide will be considered a non-counting slide, should offerors choose to include one. No additional annexes or documentation are requested now.

Part 2 – Cost Proposal

The contract type for the presumptive task order will be Fixed Price, awarded as a subcontract by DAI Global, LLC. Please include your total proposed fixed price along with details for specific deliverable pricing. Offerors should also include a cost breakdown of the hourly rates for proposed personnel, if applicable, with a build-up to their total proposed price or include substantiating price reasonableness documentation/justification. Offerors are expected to use their own cost/budget template(s); 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 (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, including the workshop agenda, facilitation guide, workshop summary brief, and full report.
 - ii. Proposed technical approach reflects familiarity with/understanding of the co-creation process, and incorporates relevant technical experience in developing/implementing engaging, participatory, and responsive workshop sessions.
 - iii. Proposed approach reflects the blended finance/gender lens investing focus of the workshop and demonstrates offeror's understanding of how to engage a mix of financial sector actors, development organizations, and donors.
- b. **Institutional Capacity (40 Points):** Points for this section will be based on information presented in the corresponding section and any submitted past performance case studies. The offeror should demonstrate their:
 - i. Experience in designing and facilitating co-creation workshops and/or designing workshops that revolve around building a shared vision with a wide variety of participants.
 - ii. Experience in working for USAID or other donors, taking into account their motivations and interests.
 - iii. Experience working with private sector and financial sector actors, taking into account their motivations and interests.
- c. **Management Plan / Staffing Structure (20 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 facilitation, including those with experience facilitating groups that include similar participants to those anticipated in this workshop.

- 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-032:
Women's Global Development and Prosperity Initiative (W-GDP)
Co-Creation Workshop Facilitation 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.

USAID's Office of Gender Equity and Women's Empowerment (USAID/GenDev) has engaged INVEST to support the Women's Global Development and Prosperity Initiative (W-GDP) to increase women's entrepreneurship and economic empowerment through a range of innovative and blended finance approaches including the promotion of gender smart investing, the expansion of financial services to women through innovative channels, and the empowerment of women through workforce development opportunities and the strengthening of the enabling environment.

The White House established the [Women's Global Development and Prosperity Initiative](#) (W-GDP) in order to execute the vision articulated in the President's National Security Strategy (NSS) to empower women worldwide to fulfill their economic potential, and in doing so, create conditions for increased stability, security, and prosperity for all. As stated in the NSS, "societies that empower women to participate fully in civic and economic life are more prosperous and peaceful. We will support efforts to advance equality, protect the rights of women and girls, and promote women and youth empowerment programs."

Background

INVEST has released a request for Expressions of Interest (EOIs) to identify potential partners and innovative approaches that leverage USAID resources to catalyze commercial investment for women's economic empowerment and equality in USAID presence countries. This co-creation will build on the momentum of Gender Lens Investing as a platform for the financial sector's participation blended finance approaches to advance these key development objectives and will use the workshop to collectively design solutions that leverage USAID resources to catalyze systemic change in service of the W-GDP objectives.

Objective

DAI is seeking a facilitation partner to design and facilitate the two-day co-creation workshop in collaboration with INVEST and the W-GDP team. We anticipate 10-15 organizations with 1-2 participants each selected from those submitting expressions of interest, along with 5-7 USAID staff, invited experts, and partner donor organizations. These participants will come together to explore the challenges faced by financial institutions to support women's economic empowerment, the new business models and partnership structures that might overcome those challenges, and help USAID develop a strategy for how best to employ blended finance solutions to overcome operating hurdles and unlock the sector's critical involvement in women's economic prosperity.

Following the workshop, USAID will invite select participants to develop the most promising ideas into full proposals for funding consideration.

Activities

Under this scope of work, the Facilitation Partner will engage in the preparation, implementation, and follow up of the co-creation workshop for the W-GDP activity. The Facilitation Partner will work closely with INVEST, USAID and workshop participants during all stages of this work.

Preparation and Design:

During this stage, the Facilitation Partner will conduct brief background research, which could include reviewing program documents and the successful expressions of interest and potentially carrying out participant surveys and interviews should time allow. 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 agenda and facilitation design of the workshop so as to meet the program's objectives while engaging each of the participants in a substantive way. The Facilitation Partner will share and validate the findings from the background research with USAID.

Based on the background research, the Facilitation Partner will draft an agenda for the two-day workshop, design the workshop structure and activities, propose necessary supplies and resources, share recommendations on the workshop space and set-up, and create any required facilitation materials. This might include participant agendas and pre-workshop packets, workshop tools, exercise templates, a facilitation guide, participant bios, and others. Through the process, the Facilitation Partner will solicit input and feedback from INVEST and USAID.

In addition to supporting the design and preparation for the workshop content, the Facilitation Partner will be expected to support the INVEST and USAID team in outreach and communications to the workshop participants. This might include disseminating logistical information about the event, acting as a point of contact for participants who have questions, gathering and disseminating participant information ahead of time, and handling invitations for any social events alongside the workshop, should the team collectively decide to arrange something.

Implementation and Facilitation:

The Co-Creation Workshop is expected to run for two full days November 21-22, 2019. The Facilitation Partner will run the workshop, keeping the sessions fresh and engaging, and driving to the desired output of a market-informed vision for USAID's approach to blended finance in support of W-GDP and creative new partnership models that might be further developed into funded solutions. This might include running breakout sessions, gallery walks, information-sharing activities, icebreakers, group exercises, session recaps, and other participatory methods to maintain momentum, keep participants interested, and drive the discussions towards meaningful outcomes. The Facilitation Partner will make a special effort to ensure active participation from all and to draw less participatory, or more soft-spoken participants into dialogue and solicit their thoughts.

While the pre-designed agenda will drive the workshop implementation, it is envisaged that session topics and formats will be adjusted throughout based on participant feedback, facilitator/organizer observations, and prior session outcomes to ensure the event remains relevant and continues to move towards the objectives of the workshop. It is anticipated that there will be a wide range of initial ideas, grouped around a number of different subject areas that may need to be prioritized and focused on a few 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. At the point of presentation, final concepts should detail how USAID and financial sector partners can work together to effectively mobilize private capital in service of the goals of W-GDP using a blended finance approach.

During (and after) the workshop, feedback from participants should be collected and analyzed in order to evaluate what did and did not work. 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 video to capture verbal report outs, or some combination therein. The Facilitation Partner might also suggest additional ways to collect photos, videos, quotes and feedback to allow participants to collectively share their experience.

Workshop Follow Up:

Following the workshop, the Facilitation Partner will be responsible for documenting and submitting to INVEST the outputs of the co-creation workshop. This should be in the form of a brief summary report, a capture of all outputs including developed concepts, and a final report on the activity.

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 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, the use of large canvasses and post-it notes, 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 W-GDP goals

The Facilitation Partner will prepare a workshop brief (2-3 pages) capturing the events and outcomes of the workshop to be circulated within a week of the workshop closing. This will serve as a useful resource to participants and keep the momentum moving forward while the proposal phase is underway. Additionally, the Facilitation Partner will draft a full workshop report to document the workshop process, the event itself, thoughts on how the workshop contributed to the co-creation of new approaches to support the W-GDP goals, and recommendations for how the agenda or facilitation could have been more effective. 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 final 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.

Deliverables

The following deliverables are expected from the Facilitation Partner:

- Participation in, and summary notes from, kick-off meeting with INVEST and USAID (in-person or via conference call)

- Finalized workplan and timeline based on kick-off meeting
- Proposed agenda for workshop, along with facilitation guides, suggestions for venue structure (e.g., seating arrangements and chart) and workshop materials (e.g., participant biographies, name tags, logistical guides, background reading, supplies lists)
- Workshop facilitation (2 days)
- Workshop brief including details of discussions and proposed new solutions
- All videos, photos, and workshop collateral collected during the event
- Comprehensive workshop report documenting the process, the content, the outputs and the learning

Illustrative Timeframe

The duration of this Scope of Work is approximately 1 ½ months. It is expected that the Facilitation Partner will begin workshop preparation no later than November 8, 2019. The workshop will be held November 21-22 (fixed dates) and the Facilitation Partner will use the month following to draft the workshop reports and finalize the deliverables.

Activity / Deliverable	Proposed Timeline
Participation in, and summary notes from, kick-off meeting with INVEST and USAID	November 8
Draft agenda for INVEST and USAID review	November 15
Finalized agenda for workshop, along with facilitation guides, suggestions for venue structure (e.g., seating arrangements and chart) and workshop materials (e.g., participant bios, name tags, logistical guides, background reading, supplies lists)	November 20
Workshop facilitation	November 21-22
Workshop brief	December 6
Comprehensive workshop report	December 20