

To: Offerors

Date: December 6, 2023

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

Subject: Request for Proposals (RFP) INVEST-133: Jamaica Education PPP Feasibility Study

Due: 1:00 PM Eastern Standard Time (EST) on **January 10, 2024**

Dear Offeror:

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 in support of USAID/Jamaica.

- I. RFP Process and deadlines:** This solicitation will result in the award of one (1) Firm Fixed Price subcontract. The ceiling of the awarded subcontract is expected to be between \$175,000-\$225,000. Please note that Offerors should submit a proposal that is priced competitively for the stated work.
1. Submission of Questions – Questions must be submitted in English no later than **1:00 PM EST on December 13, 2023** via email to INVEST_Procurement@dai.com. DAI will aim to respond to these questions in approximately three business days.
 2. Submission of Proposal – Proposal must be submitted in English no later than **1:00 PM EST on January 10, 2024** via email to INVEST_Procurement@dai.com, copying Katherine_Tilahun@dai.com. The subject line of the email should be your organization name, followed by “Submission under Request for Proposals (RFP) INVEST-133: Jamaica Education PPP Feasibility Study.” Please certify in your submission email a validity period of 60 days for the price(s) provided. In order to submit a proposal, offerors must have at least initiated the process to obtain a [SAM UEID](#). If the UEID has not yet been issued, offerors should note that in the submission and update INVEST at INVEST_Procurement@dai.com once it is issued. 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 ten (10) slide presentation, using 12-point standard font size. Graphics may be included, so long as text is clearly legible with a minimum font size of 10. 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 cost proposal in Excel format; offerors may use the attached cost/budget template.

Part 1 – Technical Proposal

Please limit your technical proposal to no more than ten (10) slides. The technical proposal is composed of the following three (3) sections:

1. **Technical Approach** – Offeror 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 achievement of the objectives as detailed in the SOO and completion of all deliverables and milestones as proposed within the stated timeline. The offeror should also include a clearly defined work schedule, which clearly lays out the timeframe for the completion of deliverables described in the SOO and any proposed interim deliverables, as well as the proposed timeline for completion, with due reference to set methodologies and data collection/validation approaches.
2. **Institutional Capacity** – Offeror should provide details about the experience, networks, expertise, and capacity of their firm (or firms if partnering arrangement is proposed) to implement the proposed approach and complete the work as described. This should also include past performance information for similar activities as those planned under this proposal and note any previous experience working as partners if a partnering arrangement is proposed. Specifically, the Offeror should include institutional experience conducting the activities described in the SOO and have successfully completed at least two previous feasibility studies or assessments for similar Public Private Partnership (PPP) projects. Offerors should indicate if they can draw from relevant previous experience in Jamaica or comparable country contexts.
3. **Management Plan/Staffing Structure** – Offeror should include details of personnel who will be assigned to the activities described in the technical approach along with their proposed roles and responsibilities. Additionally, the Offeror should include a clear management plan in narrative form for the development, review, and submission of deliverables, including a milestone schedule that indicates their proposed timeline for implementation.

The offeror is permitted to engage in partnering arrangements if it will aid in providing best value to USAID, regardless of whether organizations belong to the USAID Finance and Investment Network managed by INVEST. 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, oversight, and coordination controls to ensure successful delivery.

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 (i.e., case studies) 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, and offerors should include one and list on it the names of all firms participating in the bid. No additional annexes or documentation are requested nor should be submitted.

Part 2 – Cost Proposal

The subcontract type for the presumptive work will be Firm Fixed Price, awarded as a subcontract by DAI Global, LLC. The cost proposal should not exceed the stated budget range of \$175,000-\$225,000. Please include your total proposed fixed price along with details for specific deliverable pricing. The offeror must also include a cost breakdown of the hourly rates for proposed personnel, any other direct costs, indirect costs, and fees if applicable, with a build-up to their total proposed price or include substantiating price reasonableness documentation/justification. Cost breakdowns included will be utilized to determine price reasonableness. The offeror should use the attached cost/budget template for guidance, but are not required to use it, as long as the cost proposal captures the necessary elements (i.e. deliverables table with breakdown of how the deliverable totals were calculated). The successful offeror will need to demonstrate that the proposed rates, fees, etc. are reasonable and will be required to provide documentation during subcontract negotiations to substantiate costs, as needed. 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 Proposal. 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, 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 the offeror on the following factors, consistent with the offerors' technical proposal. The Technical Proposal will be evaluated against the following criteria:

- Technical Approach (50 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, demonstrates depth of understanding of the context and objectives, and also incorporates the offeror's competencies. Specifically, the technical approach should

clearly demonstrate the reasonableness and efficiency of the approach for each Activity. At a minimum of the technical approach should describe the specific methodology to be adopted for each task, with direct reference to the following:

- Specific indication on how the technical approach for each activity will result in the required outputs/deliverables;
- Adherence to specific policies and regulations in Jamaica;
- How the findings of the assessment/analyses will be applied within the context of Jamaica to ensure the PPP will be able to deliver its intended results

The proposed technical approach should also demonstrate a strategic and appropriate methodology for stakeholder engagement and consultation, at each key stage of the activity. At a minimum, the technical approach should include the specific engagement mechanisms to be used for each key stakeholder and the plan for the workshop with Government of Jamaica stakeholders.

- b. **Institutional Capacity (30 Points):** Points for this section will be awarded based on information presented in the corresponding section and any submitted case studies (i.e., examples of past performance). The Offeror should demonstrate any knowledge, technical experience and past performance of timely and successful delivery of feasibility studies or assessments for similar PPP projects. Preference will be given to firms and/or consortia that have past performance in minimum two past feasibility studies and/or assessments. Firms with experience within Jamaica or the Caribbean region are also preferred.
 - c. **Management Plan/Staffing Structure (20 Points):** Points for this section will be awarded 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. The proposal 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 proposal should present the qualifications and skills of proposed personnel in alignment with their roles on the activity, demonstrating their knowledge of and experience working with similar local government stakeholders.
2. **Cost Proposal:** Total 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 U.S. 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: Please visit the [INVEST Procurement Hub](#) website (scroll down to "Terms and Conditions") for RFP 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 (SOO) under RFP INVEST-133
USAID INVEST: Mobilizing Private Investment for Development
Education Public-Private Partnership (PPP) Feasibility Study
USAID/Jamaica

Introduction

USAID seeks to unlock the potential of private capital to drive inclusive growth. Increasingly, private investors and businesses are looking to emerging markets for better returns and new market opportunities. Specifically, USAID can leverage its resources – grants, technical assistance, guarantees, and convening power – to help raise awareness of investment opportunities, lower transaction costs, and mitigate the risk of investments that generate positive social, economic, and environmental impact.

Through INVEST’s flexible buy-in mechanism, USAID Missions and Operating Units can access an unprecedented network of firms and individuals that have the range of technical expertise needed to identify opportunities and effectively mobilize private capital toward development priorities. Using a lean approach tailored to high potential opportunities, relevant parts of the network will come together to research, develop, and build specific solutions that align private capital with development needs.

Background

The Ministry of Education and Youth (MoEY) in Jamaica faces key education challenges. In order to address these quality education challenges, the MoEY is open to entering Public-Private Partnerships (PPPs) with private education service providers that have a proven track record of delivering quality education services. USAID/Jamaica at the request of the MOEY will support them in their considerations of managing and implementing the PPP in the education sector through the analysis of the context of Education in PPPs carried out in two phases:

Phase 1. Determining the process or roadmap for a PPP in education to be evaluated and approved by the Government of Jamaica, including (i) a review and analysis of Jamaica’s PPP regulations and procedures as well as the Education sector policies aligned with PPP; (ii) development of a PPP roadmap for the MoEY; and, (iii) a one-day in-person workshop to present both the analysis of policies, regulations, and procedures and the PPP roadmap proposed for the MoEY. INVEST is engaging this consultant through a separate effort; Phase One is not part of this subject Statement of Objectives.

Phase 2. Carry out a feasibility study and equip MoEY with the information it needs to assess this opportunity. Phase Two represents the work being requested under this Statement of Objectives and will be carried out by the selected offeror. Under Phase Two, the selected offeror will develop a feasibility study which will include to the extent possible legal, fiscal, economic, financial (including value for money analysis and development of a financial model), social, and technical impact analyses and to the extent possible preliminary environmental analysis in compliance with the Government of Jamaica (GoJ) PPP policy. In addition to the MoEY, the selected offeror will be expected to consult with key stakeholders including the Ministry of Finance: Public Private Partnership (PPP) Unit and Public Investment Appraisal Branch and the Development Bank of Jamaica, among others.

The MoEY has already received a proposal for entering a PPP in education from a conglomerate (“the firm”), an established brand that owns and manages a network of schools operating in South and Central America. The firm proposes to enter into an agreement with the GoJ to build up to eight (8) schools, recruit, hire, train and manage the teaching and administrative staff, and administer a high-quality curriculum for the schools. The firm proposes to operate these schools for 20 years with an option to extend for an additional five (5) years before transferring the schools to the GoJ.

This would be the first infrastructure PPP in the education sector of Jamaica to be developed in compliance with the national PPP Policy. The Government of Jamaica will be expected to contribute the land for the construction of the schools, as well as meeting the monthly cost of tuition per student to be paid to the firm. To determine the feasibility of this proposal, the Ministry has requested USAID/Jamaica's assistance to prepare the necessary feasibility studies and surveys.

The GoJ has a clear legal and regulatory PPP framework, policies and procedures that are laid out in its March 2023 Addendum to The Policy Framework and Procedures Manual for Privatisation of Government Assets: "Shaping New Partnerships for National Development." The document outlines the policy frameworks, including the objectives, application and principles of the PPP program as well as the institutional and administrative framework pertaining to the structures and roles of each institution with regard to strategic oversight and operational support.

The GoJ has also developed the [Public Investment Management System](#) which provides a legal framework and the required standards and processes with which Public Investment Projects (which this transaction would be classified) must comply to be accepted into the Government of Jamaica's project portfolio, the Public Sector Investment Programme. The analysis should also include determination of the effectiveness of the proposed PPP in meeting the objectives of the government. Where applicable the Development Bank of Jamaica (DBJ) will provide guidance and support.

The leadership of the MoEY and, by extension, the GoJ is keen on completing the development PPP and proceeding towards implementation as they see it as being in alignment with the education reforms proposed in the [Patterson Report \(2021\)](#). The Minister of Education and the Permanent Secretary (PS) have visited the firm's Schools in Colombia and believe that this structure PPP could be transformative and could be used as a model for other PPP projects. Specifically, the hope is that this partnership with the firm will achieve multiple reform objectives in bringing greater affordable, equitable access, and quality education from early childhood education through to secondary education. The MoEY also noted that the PPP will support their need to build-out more secondary schools as well as to promote equity since the firm's model entails a natural progression of its students from primary to secondary education. It is important to note, however, that in addition to using a different funding model in Jamaica than used elsewhere, the GoJ also wants the firm's schools to focus on providing service to underserved communities (lower income and rural) as opposed to the traditional market serving urban and middle-class students or near middle class communities.

Implementation Objective and Activities

The overarching objective of this activity is to provide the MoEY a clear understanding of the feasibility of the proposed PPP, a set of recommendations on next steps for actualizing the PPP, and to identify any key challenges or areas of risks and proposed mitigation measures.

The selected offeror will build upon the research and roadmap completed separately under Phase 1. INVEST will make the products developed by the consultant available to the successful offeror. The selected offeror is expected to propose recommendations and actionable next steps aligned with the PPP roadmap.

The selected offeror will be tasked with completing a feasibility study of the proposed education PPP based on the proposal received by the Government of Jamaica. The MoEY would like the feasibility study to cover the following areas: legal, fiscal, economic, social, technical, and financial (including value for money analysis and development of a financial model), and to the extent possible a preliminary environmental analysis in compliance with the Government of Jamaica (GoJ) PPP policy.

INVEST anticipates the selected offeror will carry out stakeholder consultations as needed to determine the impact that the proposed PPP will make in the Jamaican context. This should include relevant stakeholders, such as: existing teachers, relevant Unions (e.g. Jamaica Teachers Association), teacher training institutions, communities including parents and students, and others.

In addition to the feasibility study, INVEST requests support performing the necessary due diligence on the firm to the extent possible. This could include assessing lessons learned from the firm's previous experience constructing schools to see if their construction timelines and the per student costs are realistic in the context of their proposed PPP for Jamaica. This is critical as there is no precedent for this form of direct PPP where the government is asked to guarantee enrollment and meet the cost of tuition per student.

Once the feasibility study has been completed, the selected offeror is expected to hold a one-day workshop in Jamaica to present and validate the findings, discuss recommendations for next steps as well as key mitigation measures for identified risks, and ensure the Government of Jamaica has a clear understanding of how to proceed. We anticipate the workshop will be attended by 30-40 stakeholders. Offerors should include the management of the logistics for this event, including the venue and necessary equipment, lunch and coffee breaks as appropriate, and all required materials. Offeror will be responsible for identifying the venue and all logistics related to the workshop and will facilitate the presentation of findings and discussions to follow.

It is anticipated the selected offeror will work closely with INVEST, USAID/Jamaica, MoEY and any other identified stakeholder relevant to the exercise. Some of the tasks can be carried out remotely, but it is anticipated the selected offeror will need to spend substantial time in-country to meet with stakeholders to complete the feasibility study and identify recommendations for moving forward with the PPP.

Following the completion of the feasibility study, the selected offeror will be asked to draft a five-page case study that can be used as a learning tool within USAID. The case study should describe the background, the purpose and expected results from the PPP. The case study will follow the [EduLinks template](#).

Illustrative Deliverables

The selected offeror can propose interim deliverables, based on their technical approach, which will result in the successful execution of the above-described implementation objective. We anticipate the following illustrative deliverables to be indicative of the types of outputs this consultancy will produce. All deliverables must be submitted in English.

- Feasibility study including technical, economic, financial, social and risk assessment analysis and preliminary environmental assessment to help provide MoEY with the information it needs to make an informed decision about pursuing this opportunity and identifying key terms to ensure that this partnership will have the best chance of delivering on intended results
- Financial model
- Recommendations on whether/ how to proceed with the proposed PPP in education along with mitigation measures to address risks identifies in the feasibility study, ensuring recommendations are aligned with the PPP Roadmap
- A one-day workshop in Jamaica with the MoEY and other key GoJ stakeholders presenting the feasibility study findings and discussing next steps and key resource requirements needed for the MoEY to effectively develop and implement this PPP.
- A 5-page case study that will provide the background of this PPP, the purpose of the PPP per the MoEY's standpoint, and how USAID engaged in this PPP through the consultancy, and the

expected results from this PPP to be included in the USAID Education Finance training for USAID Education Officers

Offerors are expected to propose a technical approach and set of deliverables to meeting this statement of objectives that clearly states the areas of the feasibility study and requested support they are able to successfully complete within the time available for this activity.

Period and Place of Performance

The activity is anticipated to start in February 2024 and be completed by the end of June 2024. However, offerors should propose a timeline that is representative of their proposed technical approach and management plan that delivers the scope of work as described. Please note that all activities under the subcontract must be concluded by June 30, 2024.

Some of the tasks can be carried out remotely, but it is anticipated the selected offeror will need to spend substantial time in-country to meet with stakeholders in order to complete the feasibility study and identify recommendations for moving forward with the PPP. Additionally, offerors should expect to be present in Jamaica for the workshop. If the offeror proposes to carry out some of the work remotely, they should consider time zones for virtual meetings with both in-country stakeholders, USAID and the INVEST team located in Washington, DC.

Anticipated Budget

The anticipated budget for this activity is approximately USD \$175,000-\$225,000.

Role of INVEST

INVEST will work closely with the selected offeror during all stages of this work. DAI will subcontract the selected offeror directly and provide review and oversight throughout the life of the activity. The INVEST team will administer periodic check-ins, reporting, deliverable review prior to client presentation and approval, and manage an ongoing monitoring, evaluation and learning framework.

- **Subcontractor Onboarding:** INVEST will provide the successful offeror(s) with all necessary context, and work with the successful offeror to develop the work plan.
- **Project Implementation:** The successful offeror will implement the work as prescribed by the work plan(s). INVEST will provide management support and ensure periodic check-ins/reporting.
- **Ongoing Monitoring, Evaluation, and Learning Support:** DAI will work closely with the subcontractor to define appropriate indicators for the overall activity. DAI will work with the subcontractor to develop the ME&L plan at the kickoff and will collect and review data from the subcontractor for requisite reporting to USAID throughout the life of the activity. The selected partner(s) will be required to reasonably maintain and report on relevant data as part of the periodic check-in process. DAI will conduct data quality assessments as necessary.

**RFP INVEST-133: Jamaica Education PPP Feasibility Study
Question and Answers (Q&A)**

1. What is the expected sequencing and respective timelines of Phase 1 and Phase 2?

Phase 1 is anticipated to start in January 2024 and be completed by the end of February 2024. Phase 2 is anticipated to start in February 2024 and be completed by the end of June 2024. All activities must be concluded by June 30, 2024.

2. Will there be the opportunity for the Phase 2 consultants to attend the Phase 1 workshop and/or interact with the Phase 1 consultant?

The selected offeror will have access to all the deliverables produced under Phase 1. Depending on when the award is finalized for Phase 2, if the Phase 1 work is still ongoing, there will be opportunities for direct interaction with the Phase 1 consultant. The INVEST team will also be available to provide context for Phase 2.

3. Have the prospective sites for the school construction from “the firm” already been identified? If not, is that identification part of the scope of the environmental assessment of the Phase 2 work?

Two prospective sites have been pre-identified by the Government of Jamaica and the firm. Identification of additional sites is not anticipated to be included in the deliverables produced under the Phase 2 award.

4. What commitment has “the firm” given to being part of the due diligence process in Jamaica and, potentially, Colombia?

The firm has indicated that they are willing to participate in any due diligence exercise and/or to provide required information.

5. Would you be open to a technical approach that focuses holistically on the likely impact of the PPP and alignment of the firm’s proposal with MoEY’s priorities, or should the focus of the approach be on the technical assessments (legal, fiscal, etc)?

As set forth in the Statement of Objectives (SOO), the purpose of this activity is to provide the Government of Jamaica a feasibility study of the proposed education PPP in order to equip them with the information needed to determine whether to pursue this opportunity. The MoEY has indicated they would like the feasibility study to cover the following areas: legal, fiscal, economic, social, technical, and financial (including value for money analysis and development of a financial model), and to the extent possible a preliminary environmental analysis in compliance with the Government of Jamaica’s PPP policy,

We are open to all offerors that propose a realistic approach to achieving the objectives of this activity. Offerors may include additional elements beyond the illustrative activities provided in the SOO, however we encourage offerors to include only those activities they can successfully implement within the period of performance indicated within the RFP.