

# Request for Proposal

**Date:** 10/28/2021

**Subject:** Contractor to support 2021 corp. measurement data mgmt & analysis

**Introduction:** TechnoServe is an international nonprofit organization that helps people lift themselves out of poverty by harnessing the power of the private sector. Operating in almost 30 countries, we work with hardworking women and men in the developing world to build competitive farms, businesses, and industries. By linking people to information, capital, and markets, we have helped millions to create lasting prosperity for their families and communities.

**General Requirements:** The requirements for TechnoServe's anticipated purchase are listed below. An additional and more detailed Statement of Work is also attached.

The objective for this contractor will be to support the Impact Team in designing and implementing these changes to KPI's and the reporting process. Tasks include: developing reporting templates, facilitating the data collection process, data analysis, and providing recommendations for long-term data solutions.

**Period of Performance:** The period of performance of any contract resulting from this solicitation is anticipated to be between the start and end dates listed below. Proposals shall detail the estimated length of time required to accomplish all requirements, with detail on individual activity implementation dates, as referenced in the Scope of Work.

**Start Date:** 11/11/2021

**End Date:** 2/28/2022

**Proposal Content Instructions:** In addition to responding to the Statement of Work, all proposals must:

- Describe the qualifications, experience and capabilities of the firm in providing the type of services being requested by this RFP. Resumes or CVs of "key personnel" shall be submitted as an attachment.

- Include a contact name, email address, and telephone number to facilitate communication between TechnoServe and the submitting organization.
- A brief outline of the company and services offered, including:
  - Full legal name, jurisdiction of incorporation, and address of the company.
  - Full legal name and country of citizenry of company's President, Chief Executive Officer, and/or all other principal officers of the company.
- Year the business was established.

Proposals must contain a detailed cost breakdown with applicable taxes and other charges clearly identified (and be presented in conformity with any further instructions included in the Statement of Work).

To ensure consideration, all quotes must be submitted in the language, currency, and by the due date noted below:

**Language:** English

**Currency:** USD

**Submission Instructions:**

All proposals must be emailed to the address below with your proposal attached in one or more files (PDF preferred). You will receive an auto-confirmation upon receipt. To ensure the integrity of this procurement exercise, DO NOT email your proposal to any employee of TechnoServe or deliver your proposal in hard copy to a TechnoServe office. **Failing to strictly adhere to these instructions may make your proposal ineligible for consideration.**

**Email:** buy+US+P0004971@tns.org

**Order of Events:**

This solicitation exercise will be administered in accordance with the following dates (subject to change at TechnoServe's sole discretion):

<b>Date</b>	<b>Event</b>
11/8/2021	Last date that questions will be accepted. Note that questions and answers will be distributed to all interested parties, so questions should not disclose trade secrets, confidential information, or information that might give another vendor a competitive advantage.  Questions should be emailed to:  jtinker@tns.org
11/9/2021	Date that answers to questions will be distributed to all.
11/10/2021	Last date that proposals will be accepted by TechnoServe.

**Terms and Conditions:**

- The Request for Proposal is not and shall not be considered an offer by TechnoServe.
- All responses must be received on or before the date and time indicated on the RFP. All late responses will be rejected.
- All unresponsive proposals will be rejected.
- All proposals will be considered binding offers. Prices proposed must be valid for the entire period provided by the respondent or required by the RFP.
- All awards will be subject to TechnoServe contractual terms and conditions and contingent on the availability of donor funding.
- TechnoServe reserves the right to accept or reject any proposal or cancel the solicitation process at any time, without assigning any reason, and shall have no liability to any vendors submitting proposals for such rejection or cancellation of the RFP.
- TechnoServe reserves the right to accept all or part of the proposal when awarding the purchase order/contract.
- All information provided by TechnoServe in this RFP is offered in good faith. Individual items are subject to change at any time and all bidders will be provided with notification of any changes. TechnoServe is not responsible or liable for any use of the information submitted by bidders or for any claims asserted therefrom.
- TechnoServe reserves the right to require any bidder to enter into a non-disclosure agreement.
- The bidders are solely obligated to pay for all costs, of any kind whatsoever, which may be incurred by bidder or any third parties, in connection with the Response. All Responses and supporting documentation shall become the property of TechnoServe, subject to claims of confidentiality in respect of the Response and supporting documentation, which have been clearly marked confidential by the bidder.
- Bidders are required to identify and disclose any actual or potential Conflict of Interest.

**Criteria for Selection:**

The evaluation of each response to this solicitation will be based on the requirements set out in the Criteria for Selection and according to the requirements in this RFP. At the sole discretion of TechnoServe, the responsive bidders may be selected for follow-up questions or to provide an oral presentation. TechnoServe reserves the right to award the contract to the organization whose proposal is deemed to be in the best interest of and most advantageous to TechnoServe. TechnoServe will not award a contract to any bidder where there is indication of a lack of business integrity. After TechnoServe receives proposals and written evaluations are completed, the selected bidder will be notified. Commitments made by the bidder after selection, and final demonstration will be considered. The following points will be assigned to the proposals for evaluation purposes.

<b>Max Points</b>	<b>Criterion</b>
40	Price, inclusive of all delivery fees and taxes
20	Relevant technical skills
20	Relevant experience
20	Soft skills (communication)

**The attached Statement of Work represents an integral part of this solicitation.**

## **EXHIBIT 1: Statement of Work (SOW)**

### **Performance Location**

DC or remote

### **Term of Contract**

November 11, 2021 through February 28, 2022

This is the technical teams' Ideal time range for this SOW However, alternative timeframes will be considered, as long as they meet the requirements of the project.

### **Billable hours**

This part-time contractor is intended to provide up to 30 hours of work over the first two months of engagement.

### **Background and Objective**

TechnoServe has a global results reporting system called Corporate Measurement through which we collect, aggregate, and report our collective impact across 60+ active projects for several key performance indicators (KPIs). Corporate Measurement is led by TechnoServe's Global Impact Team which has a Monitoring, Evaluation, and Learning (MEL) Manager in each of our operational regions. The Regional MEL managers are responsible for engaging each of the project teams to collect their datasets and indicator results. The process of collecting Corporate Measure data begins around November and ends in January. The final analysis and information products are completed by April. In 2021 we are making several modifications to our KPIs as well as the reporting process which necessitates changes to the data collection, aggregation, and analysis processes. Since further changes are expected after we learn from our first-year efforts, rather than investing in building a new technology platform to support the new data processes, TechnoServe is opting to conduct the 2021 reporting process as a lean pilot. The collection process will be largely spreadsheet-based but could also take advantage of products such as AppSheets, Knack, Trello to help keep organized and move data effectively. The objective for this contractor will be to support the Impact Team in designing and implementing these changes.

### **Contractor Tasks**

- **Develop reporting templates** - The corporate measurement process requires that all 60+ projects provide their results across several KPIs, but also that the calculation behind each KPI can be reviewed and audited. The contractor will develop a reporting template that allows project teams to input KPI results, input (or link to) their raw data, and show their calculations. A new addition in 2021, which the reporting template will need to allow for, is that we will be adding a portfolio of ~30 additional optional indicators which projects may report on when applicable. The reporting template will also need to facilitate aggregating the KPI results from all 60+ projects into a consolidated master dataset. We assume the template will be in Google Sheets and involve substantial use of scripts to automate processes, although alternative solutions may be explored. (Due: late November)
- **Facilitate the data collection process** - Build a tracker to monitor the progress of all 60+ projects throughout the reporting process. Respond to help requests from the Regional MEL Managers as they work with project

teams to complete the template. Review datasets as they are submitted to ensure data integrity, accuracy, and completeness. Add to and improve the documentation that supports the data collection process. Create a dashboard that allows results to be viewed as they are submitted. (Throughout December and January)

- **Analysis** - Once all of the results have been submitted, the contractor will merge the new data with our old dataset, and conduct a final data cleaning to complete a master dataset. The contractor will then support in analyzing the data and creating several dashboards, and visualizations that present summaries of the data for a variety of audiences. In past years, our core products included an interactive dashboard for external audiences, static dashboards disaggregating results for by regional, practice area, and donors for internal audiences, and numerous advanced graphs to add to presentations and reports. While these past products will provide a good starting point, the change to our existing KPI will necessitate careful revision and retooling of all products. Also, the addition of new metrics will allow for considerable data storytelling and the creation of new visualizations. Creating these products will involve drafting and receiving feedback on multiple iterations from different audiences to ensure they understand the message correctly, as well as from program leaders to ensure we are exploring all pertinent questions.
- **Provide recommendations for long-term data solutions** - Following 2021 pilot data and further revision to our KPIs and the reporting process, TechnoServe will likely want to invest in a technology platform.

### **Deliverables**

- Data reporting template and supporting documentation (November 20, 2021)
- Complete clean and aggregated master dataset
- Analysis and data products
- Recommendations report

### **Deliverable Acceptance Standards**

The contractor will work with James Tinker ("TNS Representative") to ensure that all deliverables as outlined above have been successfully completed to TNS' reasonable satisfaction.

- Data reporting template - The template will allow project teams to successfully input KPI results, input (or link to) their raw data, and show their calculations. Meeting an acceptable standard requires that the template is user friendly and has sufficient documentation to provide guidance, such that a member of our project team uses the template without frustration.
- Aggregated master dataset - The dataset will have no error and complete referential integrity. The dataset will be structured in a practical way to support analysis.
- Analysis and data products - These products are at an acceptable standard when they are easily intelligible by a variety of audiences, ready to share externally, and have incorporated feedback from TechnoServe leaders.

### **Operation and Logistical Considerations**

This is a temporary full-time assignment reporting to TechnoServe's Director of Impact in Washington DC. Working remotely is acceptable. The position requires bi-weekly check-ins and to be available throughout the day during core business hours.

### **Skills Required**

Each bid will be evaluated based on the relevant skills and experience presented in the proposal. Examples of relevant experience include:

- Advanced abilities in Excel spreadsheets, Google scripts, visualization products (Tableau, PowerBI, Jupyter Notebooks, or other python data viz libraries), and/or apps such as Knack, AppSheets, etc. Experience with Salesforce is a plus.
- Experience with Data aggregation processes and/or Developing tools for KPI reporting

### **Portfolio Evaluation**

Along with a proposal, each bid should include 2 work samples of data visualization or analysis.