



## Request for Quote/Proposal (RFQ/RFP)

Commodity/Service Required:	Course on education sector futures thinking and Foresight
Type of Procurement:	Purchase Order (LPO)
Type of Contract:	Firm Fixed Price
Term of Contract:	25 July to 31 August 2022
Contract Funding:	AID-OAA-TO-16-00017
This Procurement supports:	USAID's ACR Philippines Capacity Building and Education Exchanges program
Submit Proposal to:	Josephine Marcos Operation Specialist at <a href="mailto:jmarcos@rti.org">jmarcos@rti.org</a>
Date of Issue of RFP:	May 25, 2022
Date Questions from Supplier Due:	May 30, 2022
Date Proposal Due:	June 8, 2022
Approximate Date Purchase Order Issued to Successful Bidder(s):	July 15, 2022

**Method of Submittal:** Via email to [jmarcos@rti.org](mailto:jmarcos@rti.org)

Respond via e-mail with attached document in MS Word / pdf format.

The Bidder/Seller agrees to hold the prices in its offer firm for **60 days** from the date specified for the receipt of offers, unless another time is specified in the addendum of the RFP/RFQ.

Solicitation Number:	ACR Philippines-RFP/RFQ-3-FY22
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RTI International is a trade name of Research Triangle Institute. RTI and the RTI logo are U.S. registered trademarks of Research Triangle Institute.

The offeror should respond to this RFP by submitting:

- **A technical offer** following the structure of this RFP, describing bidder’s plan to implement and assure quality of implementation of each of the tasks, training curriculum program design and schedule, propose personnel with their CV, citing prior work of the same kind, providing references similar work for previous clients.
- **A financial offer** including the cost estimate of the course with corresponding number of trainees; the term of payment and the tax ( if applicable). This will be a fixed-price agreement, with payment based on completion of the deliverables as outlined under the SOW section. The bidder should propose milestones and payment amounts as part of the financial offer.
- **Required Documents**. The following documents should be included as part of the proposal.
  - a. Supplier Company Profile Form ( See Annex 1)
  - b. Proof of company legal registration.

**The selected bidder will be required to complete following documents:**

- a. International Reqs and Certs ( See Annex 2)
- b. Unique Entity Identification number. To register the UEI number see the guidance in Annex 3.

**Attachments to RFP:**

1. Attachment “A” – Commodity Specifications
2. Attachment “B” – Instructions to Bidders/Sellers
3. All PO Terms and Conditions are listed on our website at:  
<https://www.rti.org/sites/default/files/rti-purchase-order-terms-and-conditions-v1.16.pdf>,  
[http://www.rti.org/files/PO\\_FAR\\_Clauses.pdf](http://www.rti.org/files/PO_FAR_Clauses.pdf) or for commercial items:  
[http://www.rti.org/files/PO\\_FAR\\_Clauses\\_Commercial\\_Items.pdf](http://www.rti.org/files/PO_FAR_Clauses_Commercial_Items.pdf) (hereinafter the “Terms”).  
Supplier’s delivery of products, performance of services, or issuance of invoices in connection with this purchase order establishes Supplier’s agreement to the Terms. The Terms may only be modified in writing signed by both parties.

All bidders/sellers are responsible to carefully review each attachment and follow any instructions that may be relevant to this procurement.

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# Attachment A

## Commodity Specifications or Statement of Work

### Statement of Work

Indicate a description of the activity/service that is expected from the supplier. Provide product specifications or service expectations (both if applicable). Include deliverables, timelines, and any special terms and conditions.

#### DESCRIPTION OF ACTIVITY/SERVICE:

##### Background

RTI International is an independent international organization dedicated to conducting innovative, multi-disciplinary research that improves the human condition. RTI is currently implementing a portfolio of technical assistance (TA) activities on behalf of USAID/Philippines and DepEd designed to improve Kindergarten through Grade 3 education delivery with a focus on increasing impact, scale, and sustainability of early grade reading. The activities will directly contribute to USAID's education goal to improve early grade reading skills for 100 million children by providing technical and logistical services to USAID/Philippines. Additionally, we will build the capacity and leadership of DepEd to support high impact early grade reading programs through evidence-based, actionable research and targeted training programs.

Under this activity, RTI will provide Capacity Building Support to DepEd for its activities relating to the promotion of education futures thinking across the DepEd leadership and more specifically, the future of learning spaces for literacy in primary school education. The education futures capacity building initiative, "Co-creating Learning Spaces for Early Grade Learners in the Philippines", is supporting DepEd's Education Futures Unit to prepare for the future of learning by understanding futures thinking methodology and engaging in strategic activities to develop "Future Learning Spaces". In November 2021, 14 educators including staff from the Central Office were enrolled in the National University of Singapore's "Futures Masterclass", building the capacity of senior management to guide regions in foresight thinking through policy development.

The next step is to capacitate the 17 DepEd Regional Directors or Asst. Regional directors including a maximum of 7 key officials from the DepEd Central Office specifically those that involved planning, professional development, curriculum and instruction, learning delivery etc.

Futures thinking and foresight is a specialized course that will expose the education leaders with the basics of futures thinking (theoretical) and foresight (application). Hence, training participants will explore emerging trends in education that will stretch beyond the current situation and define actionable innovation and policy strategies to capitalize on them. A capstone project called "Futures Action Plan" will be expected from the training participants to apply what they have learned to a challenge relevant to their leadership role in the education system specifically within their regions.

To this end, RTI is seeking a training provider who can deliver a face to face training to at least 25 DepEd Regional Directors and leaders for a minimum of 3 days and a maximum of 5 days. The training provider shall provide and manage the training facilities and logistic including

accommodation and meals

### **Description of Services requested**

The contractor will deliver the course to 25 DepEd leaders (17 regional directors plus maximum of 8 educational leaders at the DepEd Central Office).

The goal of this training is for participants to embrace futures thinking and foresight as a new methodology to imagine emerging opportunities that stretch beyond current expectations and define actionable innovation and policy strategies to capitalize on them.

This coursework would provide the necessary background to regional directors and education leaders of DepEd to appreciate futures thinking, develop foresight skills and co-develop or co-create a “Futures Action Plan” with their staff that goes beyond the short term or midterm plan of DepED.

Hence, the training provider will deliver a training program that builds participants’ capacity to apply futures thinking to the education context and to operationalize these concepts with practical tools and approaches - to include consultative and dialogue tools; planning and analysis; and local level initiatives/approaches.

The training contents will include but not limited to the following topics:

- Introduction to Strategic Foresight: Futures Thinking, Foresighting and Road mapping within the context of education
- Horizon Scanning and Exploring the Forces of Change (including political, economic, social and technological considerations in creating learning spaces for the future)
- Scenario Planning and Developing
- Envisioning Alternate Futures
- Developing a “Futures action plan” (FAP) for your organization

**Target participants:** Training participants will include 25 Deped leaders (17 regional directors or their representatives plus maximum of 8 educational leaders at the DepEd Central Office).

### **Participant Objectives:**

- Develop foresight capabilities and deepen their agility and decision-making
- Understand the pedagogical, technological, and socio-cultural considerations in planning for basic education and apply creating learning spaces for the future of early grade learners
- Participate in consultative dialogues with experts to prepare a futures action plan preferably in education preferably for early grade learners thereby promoting organizational and institutional resilience.

### **Minimum criteria of the training provider:**

- More than 5 years of local and international training delivery experience in the education field
- List of similar training programs that cover trainings on learning spaces, educational leadership and governance, educational policy and planning, among others

- Track record including list of clients for similar training services
- Pool of training experts with accreditation/certification as trainers

**PRODUCT OR SERVICE EXPECTATIONS (BOTH IF APPLICABLE):**

We would like the provider to propose an all-inclusive training package that will include:

- Description of course
- Prior experience and references of previous training clients (preferably in the public sector)
- Detailed course learning objectives, including but not limited to participant objectives listed above.
- Proposed content of course given in module format
- Proposed schedule/timeline/duration of the course
- Proposed training methods and delivery modality. The preference is for face to face training for a minimum of 3 days training, maximum of 5 days.
- Proposed staffing, to include as relevant: managers, lecturers, consultant advisors, trainers, module content experts/ designers, and management and administration.
- Proposed Budget. All inputs included in the proposed costs (i.e., staffing, materials, audio-visuals, certification, etc. and cost per participant or lump sum for a minimum/maximum number of participants. Please include budget for in-house training with meals and accommodation if you have the facility for it. ). The proposal shall mention the options of the name of the training facilities ( accommodation and training rooms) and include the picture in the proposals.

The technical proposal shall be evaluated on:

- The extent to which the proposed curriculum/training considers the specific requirements of the capacity building activity as described above.
- The ability of the training plan/schedule to cover topics in an integrated manner, in line with the capacity building principles/requirements outlined above.
- The extent to which the training methods can be expected to translate into applied learning and contribute into prototype development.
- The willingness of the service provider to provider to align the course to participant needs in consultation with DepEd.

**DELIVERABLES, TIMELINES, SPECIAL TERMS AND CONDITIONS:**

**Training Provider Responsibilities:**

- Hire, manage and remunerate all necessary lecturers, consultants, experts, advisers, management, administrative and financial staff needed.
- Meet with RTI and DepEd to understand the content of previous training activities to avoid duplication but involve complementarity with other prior activities.
- Deliver and facilitate the course onsite on or before August 15, 2022.
- Provide mentors/coaches as needed to follow up the learnings of the participants.

**Deliverables of the Training Provider:**

- Final curriculum content revised as needed in consultation with DepEd.
- Deliver the training to a maximum of 25 DepEd participants with specified number of hours of course delivery.
- Provide a certificate of completion to training participants and conduct a post course evaluation.
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**All deliverables must be completed by August 30, 2022.**

**Pricing**

Item #	Quantity to be Purchased	Description of Preferred Commodity or Services Specifications	Unit of Measure	Unit Fixed Price (Each)	Total Fixed Price (Each)	Lead Time Availability (Number of Days)
1	25 pax	Training program	Participants	PHP XXX	PHP XXX	
		Tax ( if any)			PHP XXX	
<b>Total Value</b>					PHP XXX	

By signing this attachment, the bidder confirms he has a complete understanding of the specifications and fully intends to deliver items that comply with the above listed specifications.

Signature:

Title:

Date:


## Attachment “B” Instructions to Bidders/Sellers

1. **Procurement Narrative Description:** The Buyer (RTI) intends to purchase commodities and/or services identified in Attachment A. The Buyer intends to purchase the quantities (for commodities) and/or services (based on deliverables identified in a Statement of Work). The term of the Ordering Agreement shall be from Award Date to the Delivery date of the Offeror unless extended by mutual agreement of the parties. The Buyer intends to award to a single “approved” supplier based on conformance to the listed specifications, the ability to service this contract, and selling price. We reserve the right to award to more than one bidder. If an Ordering Agreement is established as a result of this RFQ/RFP, supplier understands that quantities indicated in the specifications (Attachment A) are an estimate only and RTI does not guarantee the purchase quantity of any item listed.
2. **Procuring Activity:** This procurement will be made by **Research Triangle Institute (RTI International)**, located at

RTI ACR Asia Philippines 3rd Flr. Orosa Bldg., 1010 Meralco Avenue, Pasig City 1605
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*(insert full address of the office)*

who has a purchase requirement in support of a project funded by

The United States Agency for International Development (USAID)
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*(insert client’s name)*

RTI shall award the initial quantities and/or services and any option quantities (if exercised by RTI) to Seller by a properly executed Purchase Order as set forth within the terms of this properly executed agreement.

3. **Proposal Requirements.** All Sellers will submit a quote/proposal which contains offers for all items and options included in this RFQ/RFP. All information presented in the Sellers quote/proposal will be considered during RTI’s evaluation. Failure to submit the information required in this RFQ/RFP may result in Seller’s offer being deemed non-responsive. Sellers are responsible for submitting offers, and any modifications, revisions, or withdrawals, so as to reach RTI’s office designated in the RFQ/RFP by the time and date specified in the RFQ/RFP. Any offer, modification, revision, or withdrawal of an offer received at the RTI office designated in the RFQ/RFP after the exact time specified for receipt of offers is “late” and may not be considered at the discretion of the RTI Procurement Officer. The Seller’s proposal shall include the following:
  - (a) The solicitation number: ACR Philippines-RFP/RFQ-2-FY22
  - (b) The date and time submitted:
  - (c) The name, address, and telephone number of the seller (bidder) and authorized signature of same:
  - (d) Validity period of Quote: 60 days.

- (e) A technical description of the items being offered in sufficient detail to evaluate compliance with the requirements in the solicitation. This may include product literature, or other documents, if necessary.
  - (f) If RTI informs Seller that the Commodity is intended for export and the Commodity is not classified for export under Export Classification Control Number (ECCN) "EAR99" of the U.S. Department of Commerce Export Administration Regulations (EAR), then Seller must provide RTI the correct ECCN and the name of Seller's representative responsible for Trade Compliance who can confirm the export classification.
  - (g) Lead Time Availability of the Commodity/Service. July to September 2022
  - (h) Terms of warranty describing what and how the warranties will be serviced.
  - (i) Special pricing instructions: Price and any discount terms or special requirements or terms (special note: pricing must include guaranteed firm fixed prices for items requested.)
  - (j) Payment address or instructions (if different from mailing address)
  - (k) Acknowledgment of solicitation amendments (if any)
  - (l) Past performance information, when included as an evaluation factor, to include recent and relevant contracts for the same or similar items and other references (including points of contact with telephone numbers, and other relevant information)
  - (m) **Special Note:** *The Seller, by his response to this RFQ/RFP and accompanying signatures, confirms that the terms and conditions associated with this RFQ/RFP document have been agreed to and all of its attachments have been carefully read and understood and all related questions answered.*
4. **Forms:** Sellers (potential bidders or suppliers) must record their pricing utilizing the format found on Attachment "A". Sellers must sign the single hardcopy submitted and send to address listed on the cover page of this RFQ/RFP.
5. **Questions Concerning the Procurement.** All questions in regards to this RFQ/RFP to be directed to

Josephine Marcos

*(insert name of procurement officer)*

at this email address:

jmarcos@rti.org

*(insert email address of the procurement officer).*

The cut-off date for questions is *(insert date)*.

May 25, 2022

6. **Notifications and Deliveries:** Time is of the essence for this procurement. Seller shall deliver



the items or services no later than the dates set forth in the contract that will be agreed by both parties as a result of this RFQ/RFP. The Seller shall immediately contact the Buyer's Procurement Officer if the specifications, availability, or the delivery schedule(s) changes. Exceptional delays will result in financial penalties being imposed of Seller.

7. **Documentation:** The following documents will be required for payment for each item:
  - (a) A detailed invoice listing Purchase Order Number, Bank information with wiring instructions (when applicable)
  - (b) Packing List
  - (c) All relevant product/service documentation (manuals, warranty doc, certificate of analysis, etc.)
8. **Payment Terms:** Refer to RTI purchase order terms and conditions found in <https://www.rti.org/sites/default/files/rti-purchase-order-terms-and-conditions-v1.16.pdf> , [http://www.rti.org/files/PO FAR Clauses.pdf](http://www.rti.org/files/PO_FAR_Clauses.pdf), or [http://www.rti.org/files/PO FAR Clauses Commercial Items.pdf](http://www.rti.org/files/PO_FAR_Clauses_Commercial_Items.pdf). Payment can be made via wire transfer or other acceptable form. Sellers may propose alternative payment terms and they will be considered in the evaluation process.
9. **Alternative Proposals:** Sellers are permitted to offer "alternatives" should they not be able to meet the listed requirements. Any alternative proposals shall still satisfy the minimum requirements set forth in Attachment A Specifications.
10. **Inspection Process:** Each item shall be inspected prior to final acceptance of the item. All significant discrepancies, shortages, and/or faults must be satisfactorily corrected and satisfactorily documented prior to delivery and release of payment.
11. **Evaluation and Award Process:** The RTI Procurement Officer will award an agreement contract resulting from this solicitation to the responsible Seller (bidder) whose offer conforms to the RFQ/RFP will be most advantageous to RTI, price and other factors considered. The award will be made to the Seller representing the **best value** to the project and to RTI. For the purpose of this RFQ/RFP, price, delivery, technical and past performance are of equal importance for the purposes of evaluating, and selecting the "best value" awardee. RTI intends to evaluate offers and award an Agreement without discussions with Sellers. Therefore, the Seller's initial offer should contain the Seller's best terms from a price and technical standpoint. However, RTI reserves the right to conduct discussions if later determined by the RTI Procurement Officer to be necessary.

The evaluation factors will be comprised of the following criteria:

The offer will be evaluated using a combined scoring method with the following weighted scores:

- (a) **PRICE-30 points.** Lowest evaluated ceiling price (inclusive of option quantities)
- (b) **DELIVERY-20 points.** Seller provides the most advantageous delivery schedule.
- (c) **TECHNICAL-40 points.** Items/Services shall satisfy or exceed the specifications described in RFQ/RFP Attachment A.
- (d) **PAST PERFORMANCE-10 points** - Seller can demonstrate his/her capability and resources to provide the items/services requested in this solicitation in a timely and responsive manner.

12. **Award Notice.** A written notice of award or acceptance of an offer, mailed or otherwise furnished to the successful supplier within the time acceptance specified in the offer, shall result in a binding contract without further action by either party.
13. **Validity of Offer.** This RFP in no way obligates RTI to make an award, nor does it commit RTI to pay any costs incurred by the Seller in the preparation and submission of a proposal or amendments to a proposal. Your proposal shall be considered valid for 60 days after submission.
14. **Representations and Certifications.** Winning suppliers under a US Federal Contract are required to complete and sign as part of your offer RTI Representations and Certifications for values over \$10,000.
15. **Anti- Kick Back Act of 1986.** Anti-Kickback Act of 1986 as referenced in FAR 52.203-7 is hereby incorporated into this Request for Proposal as a condition of acceptance. If you have reasonable grounds to believe that a violation, as described in Paragraph (b) of FAR 52.203-7 may have occurred, you should report this suspected violation to the RTI's Ethics Hotline at 1-877-212-7220 or by sending an e-mail to [ethics@rti.org](mailto:ethics@rti.org). You may report a suspected violation anonymously.
16. **The John S. McCain National Defense Authorization Act for fiscal year 2019 - section 889.** RTI cannot use any equipment or services from specific companies, or their subsidiaries and affiliates, including Huawei Technologies Company, ZTE Corporation, Hytera Communications Corporation, Hangzhou Hikvision Digital Technology Company, and Dahua Technology Company ("Covered Technology"). In response to this request for proposal, please do not provide a quote which includes any Covered Technology. Any quote which includes Covered Technology will be deemed non-responsive. Additionally, if the United States Government is the source of funds for this RFP, the resulting Supplier shall not provide any equipment, system, or service that uses Covered Technology as a substantial or essential component

**Acceptance:**

Seller agrees, as evidenced by signature below, that the seller's completed and signed solicitation, seller's proposal including all required submissions and the negotiated terms contained herein, constitute the entire agreement for the services described herein.

By: *(Seller Company Name)*

Signature: \_\_\_\_\_

Title:

Date: