



Request for Quote/Proposal (RFQ/RFP)

Commodity/Service Required:	SMS-based survey in support of the evaluation of effectiveness and reach of DepEd Commons open educational resources [OER] repository
Type of Procurement:	Subcontract
Type of Contract:	Fixed Price
Term of Contract:	2 months
Contract Funding:	USAID
This Procurement supports:	ACR-Philippines/ACR-Asia (AID-OAA-TO-16-00017)
Submit Proposal to:	David Harbin (dharbin@rti.org), with copy to Timothy Slade (tslade@rti.org)
Date of Issue of RFP:	April 23, 2021
Date Questions from Supplier Due:	April 30, 2021 (7:00 pm Philippine Standard Time)
Date Proposal Due:	May 13, 2021, 7:00 pm Philippine Standard Time
Approximate Date Purchase Order Issued to Successful Bidder(s):	May 30, 2021

Method of Submittal:

RTI International is a trade name of Research Triangle Institute. RTI and the RTI logo are U.S. registered trademarks of Research Triangle Institute.

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 **90 days** from the date specified for the receipt of offers, unless another time is specified in the addendum of the RFP/RFQ.

The offeror should respond to this RFP by providing:

- **A technical offer** following the structure of this RFP, describing how bidder plan to implement and assure quality of implementation of each of the tasks, citing prior work of the same kind, and providing references for previous work.
- **A financial offer** that details the unit costs and total cost to complete for all activities mentioned in this RFP and in the technical offer. The financial offer must be submitted in an MS Excel Document using template under Pricing section that shows unit costs and makes apparent the calculations used to compile the total.
- **Required Documents**. The following documents should be included as part of the proposal.
 - a. Supplier Company Profile Form (See Annex 1)
 - b. Financial Questionnaire (See Annex 2)
 - c. International Reqs and Certs (See Annex 3)
 - d. DUNS number. To register the DUNS number see the guidance in Annex 4.
- This will be a **fixed-price agreement**, with payment based on completion of the deliverables as outlined under the SOW section. The bidder should suggest milestones and payment amounts as part of the financial offer.

Solicitation Number:

RFP-ACR PH-04_2021

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 or for commercial items:
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:

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 research and capacity building activities on behalf of USAID/Philippines and in collaboration with the Philippines Department of Education (DepEd) designed to improve education delivery with a focus on increasing impact, scale, and sustainability of early grade reading. All Children Reading (ACR)-Philippines 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. Through actionable research, targeted training, and support for other DepEd priority activities, ACR-Philippines is building the capacity and leadership of DepEd to support high impact early grade reading programs.

The conclusions of a 2019 landscape review carried out by RTI and partners, FIT-ED, led to the formulation a program of research and technical assistance related to education technologies and the Digital Rise initiative of DepEd's ICTS Department.

In March 2020, nationwide enhanced community quarantine restrictions due to the COVID-19 pandemic closed schools for the 2020-2021 school year and a range of efforts have been put in place to ensure continuity of learning. RTI through the ACR-Philippines activity is supporting certain efforts to leverage technology for this purpose, in particular, the creation and dissemination of digital resources through the DepEd Commons repository for Open Educational Resources: <https://commons.deped.gov.ph/>.

In May 2020, DepEd introduced the framework of the DepEd Commons to boost distance learning delivery modality in response to the Covid19 pandemic. The main objective was to have teachers actively creating original content and improving these for the DepEd Commons. DepEd Commons as an Open Educational Resource (OER) operates on the principles of access, collaboration and sharing and continuous development. It also operates in an ecosystem where other stakeholders are involved including students/learners, teachers/mentors, education officials, parents, education service providers, civil society organizations, international organizations, etc. It is utilized currently by teachers as a repository of learning resources that can be accessed by learners. As of January 2021, there are around 9 Million unique users of the DepED Commons. DepEd Commons is a work in progress and a rapidly evolving and improving portal that needs to be accessed by more users anytime and anywhere. DepEd aims to expand its coverage and reach to continuously deliver basic education to Filipino learners amidst the health crisis. To contribute

to DepEd's goal, RTI will conduct an evaluation of the usage of the DepEd commons in order to come up with evidence-based recommendations towards a fully sustainable and impactful DepEd Commons.

It is within the above context that RTI requires the support of an expert in Open Educational Resources and resource repositories to help move forward a multi-pronged evaluation of the DepEd Commons and certain categories of resources on the platform

Product or Service Expectations (both if applicable):

RTI seeks a contractor to conduct SMS surveys in the Philippines regarding citizens' access to [DepEd Commons](#), an online repository of teaching and learning resources maintained by the government. The parameters of the survey to be conducted are detailed in **Table 1** below, under *Statement of Work with Tasks and Deliverables*.

A few assumptions were made in the development of the SOW presented below. The list below attempts to render several of the key assumptions explicit:

1. The offeror maintains a database of respondents that it will consult to provide the necessary target population
2. The offeror's database will enable the sample of respondents to
 - a. be stratified by socioeconomic status (SES) quintile
 - b. consist of households with children
3. The offeror has the capacity to deliver incentive payments (in the form of currency) to participating respondents.
4. An incentive of US \$0.50 is appropriate and within the going market rate for financial incentives for completion of SMS-based polls in the Philippines.
5. The offeror has the capacity to generate send messages that are tailored on a per-respondent basis, permitting the embedding of a unique tracking ID into e.g. a URL leading the respondent to a web-based survey upon conclusion of the core survey.

If the above assumptions were in error, offerors are encouraged to both describe which were in error and how they were in error, and propose alternative mechanisms for arriving at the intended outcomes.

The offeror will execute a survey in accordance with the parameters described in **Table 1**.

Table 1: Parameters of the SMS survey

Countries	Philippines
Number of waves	1 wave
Number of completed interviews	500 completes in each region (8,500 completes total)
Target population	General population (age 18-64)
Geography	Regional
Sample targeting based on vendor database	Parents with school-aged children living in the household
Sample stratification	Stratified by SES quintile within region
Number of questions	Maximum 20 questions
Incentives	\$0.50
Languages	To be discussed with vendor
Survey methods experiments	To be discussed with vendor

Deliverables, Timelines, Special Terms and Conditions:

The vendor's responsibilities include the following:

- Provide feedback on questionnaire wording for SMS mode
- Conduct small pilot (25 completes) to ensure data are captured correctly
- Provide translations of the questionnaire into 8 languages:
 1. Bikol
 2. Cebuano
 3. Hiligaynon
 4. Ilocano
 5. Kapampangan
 6. Pangasinan
 7. Tagalog
 8. Waray
- Provide sample for study in accordance with stratification and target population defined above, using the vendor's database
- Program and test survey
- Deploy survey to sampled respondents and achieve the complete interviews, using at least three contact attempts spaced at least 24 hours apart before classifying a case as a non-response
- Provide dates and times for all contact attempts, and the *result of each attempt*
- Provide updates every ~3 days during data collection
- Deliver the data file

- Provide a table with the final disposition of *all cases contacted*

No analysis or report is required. Results will be delivered in CSV or .xlsx format. Results must include partials for all respondents who receive at least the second outbound message.

List of Deliverables

No	Deliverables	List of Responsibilities
1	Report on small pilot	<ul style="list-style-type: none"> • Provide feedback on questionnaire wording for SMS mode
		<ul style="list-style-type: none"> • Conduct small pilot (25 completes) to ensure data are captured correctly
		<ul style="list-style-type: none"> • Provide translations of the questionnaire into 8 languages:
		1. Bikol
		2. Cebuano
		3. Hiligaynon
		4. Ilocano
		5. Kapampangan
		6. Pangasinan
		7. Tagalog
2	Progress Report on the date collection	<ul style="list-style-type: none"> • Provide sample for study in accordance with stratification and target population defined above, use the vendor's database
		<ul style="list-style-type: none"> • Program and test survey
		<ul style="list-style-type: none"> • Deploy survey to sampled respondents and achieve the complete interviews, using at least three contact attempts spaced at least 24 hours apart before classifying a case as a non-response
3	Final Data file in CSV or .xlsx format and a table with the final disposition of <i>all cases contacted</i>	<ul style="list-style-type: none"> • Provide dates and times for all contact attempts, and the <i>result of each attempt</i>
		<ul style="list-style-type: none"> • Provide updates every ~3 days during data collection
3	Final Data file in CSV or .xlsx format and a table with the final disposition of <i>all cases contacted</i>	<ul style="list-style-type: none"> • Deliver the data file
		<ul style="list-style-type: none"> • Provide a table with the final disposition of <i>all cases contacted</i>

Anticipated Timeline of Activities

Activity	Estimated Time Frame
Award of contract	May 30, 2021
Draft questionnaire provided by RTI for offeror feedback	June 4, 2021
Feedback due from offeror	June 8, 2021
Final instrument to offeror	June 15, 2021
Translations complete	June 20, 2021
Pilot complete	June 30, 2021
Full data collection	July 10 – 30, 2021

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						
2						
3						
Total Value						

Notes:

The bidders should use the pricing table to submit the detail costing and submit the milestone payment based on the deliverables table.

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

3040 E Cornwallis Rd.
Durham, North Carolina
27709
U.S.A.

(insert full address of the office)

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

United States Agency for International Development in the Philippines (USAID/Philippines)

(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:
 - (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:

- (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.
 - (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

David Harbin

(insert name of procurement officer)

at this email address:

(dharbin@rti.org), with copy to Timothy Slade (tslade@rti.org)

(insert email address of the procurement officer).

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

April 30, 2021 (7:00 pm Philippine Standard Time) to

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:

- (a) **PRICE. Maximum 40 points.** Lowest evaluated ceiling price (inclusive of option quantities) .
- (b) **DELIVERY.** Seller provides the most advantageous delivery schedule.
- (c) **TECHNICAL. Maximum 40 points.** Items/Services shall satisfy or exceed the specifications described in RFQ/RFP Attachment A.
- (d) **PAST PERFORMANCE . Maximum 20 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 90 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. 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: