

Request for Quote/Proposal (RFQ/RFP)

Commodity/Service Required:	Data Collection
Type of Procurement:	Subcontract
Type of Contract:	Firm Fixed Price
Term of Contract:	Estimated May 2022 – July 2022
Contract Funding:	Bill and Melinda Gates Foundation
This Procurement supports:	Learning at Scale (support in India/Karnataka)
Submit Proposal to:	Jonathan Pamel (jpamel@rti.org)
Date of Issue of RFP:	March 20, 2022
Date Questions from Supplier Due:	March 25, 2022 11:59 PM
Date Proposal Due:	April 15, 2022 11:59 PM
Approximate Date Purchase Order Issued to Successful Bidder(s):	April 22, 2022 (estimated)

Method of Submittal:	
Email to Jonathan Pamel (jpamel@rti.org)	
The email subject line for the submission must include “Gates 2022-India-2”	
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.	
Solicitation Number:	Gates-2022-India-2

Attachments to RFP:

1. Attachment “A” – Statement of Work
2. Attachment “B” – Instructions to Bidders/Sellers
3. Attachment “C” – Budget Template
3. All Subcontract Terms and Conditions are listed on our website at forth at: <http://www.rti.org/POterms>, 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.

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:

SCOPE OF WORK

DATA COLLECTION FIRM

RTI International is an independent international non-profit organization dedicated to conducting innovative, multi-disciplinary research that improves the human condition. With a worldwide staff of more than 4,000 people, RTI offers innovative research and development and a full spectrum of multi-disciplinary services. Universities in North Carolina founded RTI in 1958 as a centerpiece of the Research Triangle Park.

RTI International has received funding from Bill and Melinda Gates Foundation through the Center for Global Development to conduct the Learning at Scale research study. Learning at Scale examines successful large-scale education programs in low- and middle-income counties to establish the ingredients for improving learning at scale. The research study will look most closely at the instructional characteristics of effective programs as well as how the programs worked within the system.

To support the Learning at Scale research study, we seek a qualified **Data Collection Firm in India** to support data collection in Karnataka in or around June 2022. The data collection firm will undertake the following tasks.

1. Research clearance obtained through appropriate Institutional Review Board (IRB) and/or other methods
2. Provision of CVs and selection process for an initial team of 26 data collectors, 1 supervisor and 2 translators
3. Final selection of 24 data collectors, 1 supervisor and 1 translator (remaining two data collectors will be trained/on call)
4. Procurement and management of training site for 32 persons, including all the supportive logistical arrangements for a 5-day training
5. 26 data collectors and 1 supervisor attend 5-day full day data collection training
6. During training week, access to 4 nearby schools for data collection practice visit (2 schools on day 3 and 2 schools on day 5)
7. Final selection of 24 data collectors

8. 24 data collectors, 1 supervisor and 1 translator conduct two-week data collection in 80-100 schools as per the plan below (including transportation and accommodations at local per diem and accommodation rates)
9. Data to be collected on Android tablets for every data collector (provided by the firm) with sufficient specifications to effectively implement the Tangerine software (www.tangerinecentral.org) and research tools provided by RTI. Supervisor responsible for data quality checks, liaising with RTI data analysis team on a daily basis.

Tangerine is open source software developed by RTI. Data collected on tablets will be stored by RTI, not by the data collection firm.

10. Oversight of data collection, including the following components:
 - a. Communicating with district education offices in order to ensure access to schools
 - b. Communicating directly with schools / head teachers to coordinate visits at each school
 - c. Communicating with coaches and trainers to coordinate visits to schools to align with enumerator visits
11. Provision of transportation and accommodation arrangements for Learning at Scale Instruction Lead (to visit schools during data collection).

Data to be collected

The table below presents the data that will be collected in the study. The number of items may shift slightly as the tools are finalized.

Tool	Duration	N per School	N Total
Teacher interview	1 hour	1	80-100
Head teacher interview	30 minutes	1	80-100
Coach interview	45 minutes	~Every other school	40-50
Trainer interview	45 minutes	n/a	10-15
Classroom observation checklist	15 minutes	1	80-100
Timed classroom observation	One reading	1	80-100

	lesson		
Coaching observation instrument	One reading lesson	~Every other school	40-50
Mini-EGRA (reading assessment)	10 minutes	15 Grade 2 students	1200-1500

Data collection will occur in the Mysore, Mandaya and Ramannagara districts in Karnataka. Final determination on the location of schools within the district will be made later, and should costs need to be revisited, the award can be modified. Please budget for average expenses (anticipating not all schools are difficult to reach).

Product or Service Expectations (both if applicable):

Applicants should be active in the country and be able to mobilize quickly for data collection, beginning the planning and initial work within one week of contract award. Applicants should be able to provide tablets for the data collection activity and will identify assessors with tablet-based data collection experience (ideally with Tangerine software and the Early Grade Reading Assessment (EGRA)).

Deliverables, Timelines, Special Terms and Conditions:

Deliverables:

The data collection firm will be selected on a competitive basis and payment will be made based on successful deliverable completion. The following are the deliverables:

- 1) Approved list of data collectors, supervisor and translator
- 2) Daily data collection supervision reports
- 3) Complete and accurate dataset uploaded to the RTI Tangerine Central cloud
- 4) Final data collection report, noting progress, challenges, and how the challenges were mitigated

Pricing

Please use the budget template in Attachment C for submission. Local currency should be used for the budget. Lines may be added to the budget as needed, please justify all costs included in the notes section on the budget template.

Please use appropriate per diem and accommodation rates locally, following the guidance provided below which aligns with RTI International’s travel policies in India:

Travel:

Road travel inside the city limits of given Work Location within India shall not be reimbursable. For those whose Work Location is Delhi, the city limits are deemed to include NCR region.

The following modes of travel when travelling outside the Work Location strictly for activities pursuant to the scope of this Contract:

- Air: Economy class air fare
- Rail: 1AC train fare
- Rail: Executive Chair Car train fare
- Road: AC cab of least cost sedan car or SUV vehicle (only when shared by minimum 3 travelers intending to travel together). Acceptable sedan cars include Maruti Swift, Tata Indica, etc. Acceptable SUV vehicles include Toyota Innova, or equivalent.

Lodging and meals:

Lodging and Travel Rates			
(Domestic - India)			
Metro Cities	Maximum Hotel Rate (Per Night) Excluding Taxes	Mileage Rate	Meals
Bangalore Chennai Hyderabad Jaipur Kolkata Mumbai Delhi/NCR Pune Lucknow	INR 9,000	INR 12/KM	INR 500 Per Meal subject to a maximum of 3 meals a day
Non-Metro Cities (All Other Cities in	INR 6,000		INR 300 Per Meal subject to a maximum of 3 meals day

India)	
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day

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 services identified in Attachment A. The Buyer intends to purchase the 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, Research Triangle, NC 27709
RTI International





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




Bill and Melinda Gates Foundation/Center for Global Development

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 in English 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:

Item	Instructions	Template
Bid Information	<p>Include solicitation number, include the name, address, and telephone number of the seller (bidder) and authorized signature of same: validity period for quote, and date and time submitted.</p> <p>Include lead time needed for availability of services.</p>	No template provided
Capabilities Statement/Technical Approach	<p>Please provide a brief narrative (5 pages maximum) describing your organization’s capabilities and technical approach as it relates to the proposed scope of work.</p> <p>technical description of the items being offered in sufficient detail to evaluate compliance with the requirements in the solicitation. This description should not be more than 5 pages total. This <u>may</u> include product literature, or other documents, if necessary.</p>	No template provided
Past Performance References	<p>Past performance information, including detailed explanation of previous experience on the same type of work in education or a related field. when included as an evaluation factor, to include at least three (3) letters of recommendation from recent (within 5 years) and relevant contracts for the same or similar items and other references (including points of contact with telephone numbers, email addresses, and other relevant information)</p>	No template provided
Key Personnel Resumes	<p>Please provide a CV for 4 candidates proposed as key personnel.</p> <p>Resume should be submitted in MS Word and is limited to 3 pages.</p>	No template provided

Item	Instructions	Template
Price/Cost Proposal	<p>Please complete the attached Budget Template in Attachment C. Please submit all offers and related budgetary documentation in local currency. The award to the winning bidder will be issued and paid in local currency.</p> <p>Special pricing instructions: Please note any discount terms or special requirements or terms <u>(special note: pricing must include guaranteed firm fixed prices for items requested.)</u></p>	 budget template - Attachment C.xlsx
Biographical Data Sheets	<p>Please complete the attached template for all personnel proposed. Please utilize the instructions within the template, have the form signed by the individual proposed in Box 16, and have the form signed by an authorized official in Box 17. Note that the proposed salary in Box 6 should match the Cost Proposal.</p>	 AID-1420-17-6-13-1 9FINAL.doc
RTI Reps and Certs	<p>Documents needed will be provided for review and signature at a later date, depending on necessity if submitted in the past year.</p>	
Company Profile	<p>Please review and complete the attached document and have signed by an authorized official. This must be updated annually, so please provide a copy if it was submitted within the past year.</p> <p>Please also provide Evidence of registration, as well as compliance with local laws including registration and tax compliance. Provide copy of the original as well as a translation if in a language other than English.</p>	 Company Profile.docx
Financial Questionnaire	<p>Please review and complete the attached document and have signed by an authorized official. This must be updated annually, so please provide a copy if it was submitted within the past year.</p>	 Financial Questionnaire.doc

Item	Instructions	Template
EFT	Payment address and instructions	 EFT.doc
Work-Day, Work-Week, and Paid Absences	Please complete the attached template regarding your organization’s work-day, work-week, and paid absences policies.	 Work-Day, Work-Week, and Pa
Evidence of Responsibility	Please review and complete the attached document and have signed by an authorized official.	 Evidence of Responsibility.docx

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 “C”.
5. **Questions Concerning the Procurement.** All questions in regards to this RFQ/RFP to be directed to

Jonathan Pamel and Rachel Jordan
(insert name of procurement officer)

at this email address:

jpamel@rti.org and rjordan@rti.org
(insert email address of the procurement officer).

The cut-off date for questions

March 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) Approval of completed deliverable by RTI

- (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 www.rti.org/poterms, <http://www.rti.org/POterms>, 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.** Lowest evaluated ceiling price (inclusive of option quantities) .
- (b) **DELIVERY.** Seller provides the most advantageous delivery schedule.
- (c) **TECHNICAL.** Items/Services shall satisfy or exceed the specifications described in RFQ/RFP Attachment A. Including provision of 4 potential candidates for key activities.
- (d) **PAST PERFORMANCE** - Seller can demonstrate his/her capability and resources to provide the items/services requested in this solicitation in a timely and responsive manner. Include both an explanation of previous experience and three letters of reference from previous clients with contact information (email and phone).
- (e) **OTHER EVALUATION CRITERIA.**

Provision of documents supporting registration and tax compliance. (translated to English if necessary).
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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. **Data ownership.** All data collected through this exercise will remain the property of the Bill and Melinda Gates Foundation, and is anticipated to be released publicly following peer review.
17. **Subcontract Implementation.** RTI and the winning bidder shall, in good faith and in a timely manner, negotiate a mutually acceptable Subcontract based upon the RTI Subcontract Terms and Conditions, a copy of which can be found at http://www.rti.org/page.cfm/Supplier_Agreements, and the mandatory flow down clauses found in RTI's prime contract.
18. **Confidential Information.** Notwithstanding any agreements, including any separate nondisclosure agreements, already in place between the parties, RTI assumes no obligation regarding confidentiality of all or any portion of a proposal or any other material except that RTI may not disclose any portion which the prospective supplier clearly designates as containing proprietary information by affixing the legend "CONFIDENTIAL INFORMATION: Do not disclose" to the upper right-hand corner of each page of supplier's proposal which contains such proprietary information. The entire proposal or accompanying materials may not be marked as proprietary information. If the prospective Bidder marks the entire proposal or accompanying materials as proprietary information, the parties agree that RTI shall be unduly restricted in its use of the proposal and materials, and therefore the parties agree that RTI may use, copy and disclose any part of the proposal or materials except those which are clearly the proprietary information of the prospective supplier. In such event, RTI's sole responsibility shall be limited to maintaining the confidentiality of the information to the same extent that it maintains its own proprietary information.

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: