



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 December 15, 2022 – May 15, 2022
Contract Funding:	The Lego Foundation
This Procurement supports:	LEGO Play Measurement (support in Ghana)
Submit Proposal to:	Siobhan McGowan smcgowan@rti.org and Lauren Edwards laedwards@rti.org
Date of Issue of RFP:	10/15/2021
Date Questions from Supplier Due:	10/22/2021
Date Proposal Due:	10/29/2021
Approximate Date Purchase Order Issued to Successful Bidder(s):	12/1/2021

Method of Submittal:	
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:	LEGOPM/RFP/2021-002

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.

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

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 is an independent international 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 The LEGO Foundation to develop a suite of tools that measure the *activities, processes, and interactions* through which playful learning takes place and the *environments and activities* that support deeper learning through play. The toolkit will include assessment packages across four age groups including:

- A. 0-2 Years: Parent-child observations and Parent survey
- B. 3-5 Years: Teacher-child observation, Parent-child observation, Teacher Survey, Parent Survey
- C. 6-8 Years: Teacher-child observation, Teacher survey, Parent survey, Child survey
- D. 9-12 Years: Teacher-child observation, Teacher survey, Parent survey, Child survey

To assess the psychometric properties, the primary tools for two age groups (6-8 years and 9-12 years, equivalent to Grade 2 and Grade 5) will be pilot tested in two phases Ghana. The Adapt Phase will involve cognitive interviewing as well as small pilot in approximately 50 classrooms. The Test Phase will be a larger pilot of the adapted instruments in approximately 200 classrooms. This scope of work is for both phases of data collection.

The anticipated timing for the Adapt Phase is January 2022 and the Test Phase is March 2022. The dates may change and will ultimately be determined in accordance with the ongoing public health situation in Ghana, and in coordination with the offeror. It is anticipated that the Adapt phase will take place in the Greater Accra region, and the Test phase is expected to take place in Greater Accra and Volta regions.

Overview and Key Assumptions

To support the LEGO Play Measurement Research Study, RTI seeks a qualified **data collection firm** to lead the in-country pilot testing, in Ghana, of the primary tools. The data collection firm will be expected to perform the following activities:

- a) RTI will lead the research clearance process through local Institutional Review Board (IRB), relevant government institutions, and/or other methods, with support of offeror.
- b) Create and maintain cordial relationships with schools and government affiliates
- c) Provision of CVs and selection process for the requested number of assessors and supervisors for two phases of data collection
- d) Final selection of assessors and supervisors for two phases of data collection. For the Adapt Phase, RTI may suggest specific assessors to engage based on previous work in Ghana.
- e) Procurement and management of training site for 9 participants (plus 2 RTI staff) during the Adapt phase and 28 participants (plus 2 RTI staff) during the Test phase, including all the supportive logistical arrangements
- f) During Test phase assessor training week, access and transportation to schools for practice/training purposes to take place twice during the training period (2 separate days); each practice visit will last for ½ day and should include 2 schools (split assessors into 2 smaller groups to accommodate for COVID safety protocols)
- g) 28 assessors and 2 supervisors conduct data collection in approximately 70 schools (including transportation and accommodations at local per diem and accommodation rates)
- h) Provision of sufficient vehicles to transport all assessor teams to data collection sites/schools
- i) Data to be collected on Android tablets for every data collector (provided by the firm) with sufficient specifications (see minimum specifications in following section) to effectively implement the Tangerine software (www.tangerinecentral.org) and research tools provided by RTI. Tangerine is an open-source software developed by RTI. Data collected on tablets will be stored by RTI, not by the data collection firm.
- j) Supervisor responsible for data quality checks, liaising with RTI data analysis team on a daily basis.
- k) 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
- l) Maintain regular communication with the Education Research Officer and the Principal Investigator.
- m) Other duties as assigned by the Education Research Officer or the Principal Investigator.

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). Applicants should also have experience with both qualitative and quantitative data collection in Ghana.

Product or Service Expectations (both if applicable):

Assessments and Sample Design

Assessments:

The following instruments will be used as part of this research:

- Adapt Phase (Cognitive interviewing and small pilot):
 - a. Structured interviews
 - a. Teacher interview and student interview
 - b. Classroom observations
 - a. Observations of reading and mathematics lessons in grade 2 and grade 5
- Test Phase (Large-scale pilot):
 - a. Structured interviews
 - a. Teacher interview and student interview
 - b. Classroom observations
 - a. Observations of reading and mathematics lessons in grades 1 to 5

Sample Design:

Minimum sample size is indicated in the below table. Details under Test phase provide more information about possibility to obtain additional classroom observations/surveys.

Ghana Data Collection Sample Sizes by Phase and Methodology									
Piloting stage		Methods	Sample sizes 6-8 Age Group			Sample sizes 9-12 Age Group			Total
			Parents /homes	Teachers /classrooms	Students	Parents /homes	Teachers /classrooms	Students	N
II. ADAPT	a. Respondent understanding	Cognitive interviews**	N/A	N = 20	N = 20	N/A	N = 20	N = 20	N = 80
	b. Pilot and	Surveys	N/A	N = 25	N = 50	N/A	N = 25	N = 50	N = 150

	revise	Observations	N/A	J = 45	N/A	N/A	J = 45	N/A	J = 90
III. TEST	a. Psychometric assessment	Surveys	N/A	N = 150	N = 350	N/A	N = 150	N = 350	N = 1000
		Observations	N/A	J = 200	N/A	N/A	J = 200	N/A	J = 400

Statement of Work with Tasks and Deliverables

ADAPT Phase (January/February 2022):

The ADAPT phase will adapt, iteratively pilot, and improve the tools. The phase will begin with cognitive interviewing regarding the perceived meaning of specific behaviors; and then will proceed to small-scale piloting of the tools in each country context. All tool measures will be revised and finalized at this point in preparation for full psychometric assessment which will happen after the TEST phase.

- Recruit Field Team for Adapt phase, which is sufficient assessors to conduct CI and then also conduct small-scale piloting
 - a. 3 assessors per school
 - b. 1 supervisor/field coordinator across the entire team
- Assessor training – Training will be facilitated by RTI staff member but offeror will cover the expenses for the venue, meals, and materials that will be used during the training. Accommodations and travel expenses of assessors, if applicable, will be covered and coordinated by the offeror.
- Working closely with RTI, arrange approvals for school visits/data collection, including Ministry approvals and providing required notices to schools

Illustrative schedule for ADAPT phase is referenced below. The final daily schedule will be determined in further consultation with the data collection firm and with RTI.

	Monday	Tuesday	Wednesday	Thursday	Friday	Sat/Sun
Week 1	Training for CI and qual. Work (9 assessors)	Training for CI and qual. Work (9 assessors)	Training for CI and qual. Work (9 assessors)	Training for CI and qual. Work (9 assessors)	Conduct CI (2 schools/day, team of 5 and team of 4, each assessor focuses on specific tool); afternoons used to discuss and revise	

Week 2	Conduct CI (2 schools)	Conduct CI (2 schools)	Conduct pretesting with instruments/electronic versions (2 schools)	Conduct CI (2 schools)	Conduct pretesting with instruments/electronic versions (2 schools)	
Week 3	Break for instrument revision/review	Break for instrument revision/review	Break for instrument revision/review	Break for instrument revision/review	Small-scale pilot (3 schools; collect 5 classroom observations, 3 teacher interviews, and 6 students interviews)	
Week 4	Small-scale pilot (3 schools; collect 5 classroom observations, 3 teacher interviews, and 6 students interviews)	Small-scale pilot (3 schools; collect 5 classroom observations, 3 teacher interviews, and 6 students interviews)	Small-scale pilot (3 schools; collect 5 classroom observations, 3 teacher interviews, and 6 students interviews)	Small-scale pilot (3 schools; collect 5 classroom observations, 3 teacher interviews, and 6 students interviews)	Small-scale pilot (3 schools; collect 5 classroom observations, 3 teacher interviews, and 6 students interviews)	

TEST Phase:

The Test phase will involve larger-scale pilot testing in Ghana and will include a psychometric assessment of the tools. Like the Adapt phase, the offeror will be responsible for the following aspects:

- Recruit Field Team for Test phase
 - a. 4 assessors per team; 7 teams
 - b. 2 supervisors/field coordinators across the entire team
- Assessor Training – Training will be facilitated by RTI staff member but offeror will cover the expenses for the venue, meals, and materials that will be used during the training. Accommodations and travel expenses of assessors, if applicable, will be covered and coordinated by the offeror.
- Arrange approvals for school visits/data collection, including Ministry approvals and providing required notices to schools
- Obtain appropriate consent/assent from participants

Illustrative schedule for TEST phase is referenced below. The final daily schedule will be determined in further consultation with the data collection firm and with RTI. It is estimated that each assessor team could complete 6 classroom observations, 4 teacher interviews, and 10 student interviews per day at each school visited.

	Monday	Tuesday	Wednesday	Thursday	Friday	Sat/Sun
Week 1	Training (28 assessors)	Training (28 assessors) – School visit	Training (28 assessors)	Training (28 assessors) – school visit	Training (28 assessors)	
Week 2	Data collection (7 schools; collect 6 observations, 4 teacher interviews, and 10 student interviews per school)	Data collection (7 schools)	Data collection (7 schools)	Data collection (7 schools)	Data collection (7 schools)	
Week 3	Data collection (7 schools)	Data collection (7 schools)	Data collection (7 schools)	Data collection (7 schools)	Data collection (7 schools)	

Tablet Provision and Management:

The data collection firm will be responsible for providing 9 tablets (one per assessor) for the Adapt phase and 28 tablets (one per assessor) for the Test phase. The minimum tablet specifications are:

- Capacitive touch screen
- Android OS [v. 5.0.2 or higher]
- HTML 5-capable browser
- Wi-Fi (b/g/n)
- 4GB HDD
- 1GB Memory
- 1GHz dual-core processor
- 7 hours battery life (without Internet turned on)
- Ability to install third-party Android applications

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 assessors, supervisor, and translator for Adapt Phase; confirmation that the required number of tablets are available
2. Daily field updates during Adapt Phase (CI and small-scale piloting)
3. Completion of Adapt Phase (CI and small-scale piloting data uploaded/shared with RTI)
4. Approved list of assessors and supervisors for Test Phase
5. Daily data collection supervision reports during Test Phase
6. Complete and accurate dataset uploaded to the RTI Tangerine Central cloud
7. Brief final data collection report, noting progress, challenges, and how the challenges were mitigated

Staffing

The data collection firm will provide a Manager/Team Leader, 2 data collection supervisors, and assessors.

Deliverables, Timelines, Special Terms and Conditions:

Anticipated Timeline of Activities

Activity	Estimated Time Frame
Finalize contract	Dec. 15, 2021
Recruitment of assessor and supervisor for Adapt Phase	Dec. 15 – Jan 10, 2022
Assessor Training – Adapt Phase	Jan. 2022
Adapt Phase (CI and small-scale pilot)	Jan/Feb 2022
Assessor Training – Test Phase	March 2022
Data Collection – Test Phase	March/April 2022

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, Research Triangle, NC 27709

(insert full address of the office)

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

The LEGO Foundation

(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

Siobhan McGowan and Lauren Edwards

(insert name of procurement officer)

at this email address:

smcgowan@rti.org and laedwards@rti.org

(insert email address of the procurement officer).

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

10/22/2021

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>, or <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.
- (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.
- (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. **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: