

Request for Quote/Proposal (RFQ/RFP)

Commodity/Service Required:	Technical Meeting Manager – An individual or organization that can provide services to manage a webinar series on Foundational Literacy and Numeracy topics
Type of Procurement:	Purchase Order/ Consultant Agreement
Type of Contract:	Anticipated to be a Fixed Price contract
Term of Contract:	On or about June 30, 2021 – September 30, 2021
Contract Funding:	The Bill & Melinda Gates Foundation
This Procurement supports:	Implementing the Science of Teaching Grant
Submit Proposal to:	Lauren Edwards, laedwards@rti.org
Date of Issue of RFP:	May 28, 2021
Date Questions from Supplier Due:	June 2, 2021
Date Proposal Due:	June 18, 2021
Approximate Date Purchase Order Issued to Successful Bidder(s):	On or about June 30, 2021

Method of Submittal:	
Electronic submission via email to Lauren Edwards, laedwards@rti.org	
Respond via e-mail with attached document in MS Word / Excel / 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:	RFQ-SOT-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 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

Improving foundational literacy and numeracy (FLN) is essential for low- and middle-income countries to provide basic education of adequate quality for their citizenry. Learning outcomes are presently so low in primary education that business as usual investments will not be sufficient to ensure needed gains in achievement. Education officers and counterpart education policymakers developing, implementing, and managing programs focused on FLN must have vastly improved technical understanding of how to design and manage these interventions. Of paramount concern is how to help decision-makers allocate the resources being funneled into such initiatives into evidence-based approaches. To improve knowledge of best FLN practices at-scale and access to this body of research, the Implementing the Science of Teaching grant is focused on the following activities:

1. **Year 1: Synthesize** existing research on FLN at-scale by developing user-friendly materials, in the form of 'How-To' Guides, on the following topics:
 - a. Structured Pedagogy (comprising 9 guides + a Literature Review)
 - b. Language of Instruction Basics
 - c. Practical Language of Instruction
 - d. Assessment-Informed Instruction: Classroom Level
 - e. Assessment-Informed Instruction: System Level
 - f. Pre-Service Teacher Education
 - g. Mathematics Program Implementation
2. **Year 2: Generate** new research to expand the evidence-base of FLN.
3. **Year 3: Disseminate** research and synthesis documents through a variety of mediums.

RTI and the Bill & Melinda Gates Foundation want to ensure the content of these guides is available as widely as possible. As such, RTI is seeking quotes for an individual or an organization to serve as Technical Meeting Manager to organize and facilitate multiple webinars.

Product or Service Expectations (both if applicable):

RTI International is seeking an individual or an organization who will be able to provide technical meeting management services. RTI will be hosting and conducting a series of virtual webinars to disseminate guides around various aspects of Foundational Literacy and Numeracy that have been developed under the Science of Teaching grant. We anticipate hosting a minimum of two approximately 1.5 to 2-hour webinars, with multiple presentations by speakers selected by RTI International. Anticipated topics include:

1. Assessment-Informed Instruction in the Classroom and Assessment-Informed-Instruction in the System

2. Multiple topics: Mathematics, Pre-service Teacher Education, and Language of Instruction

The offeror will support coordination of webinar series dates and times among key stakeholders and presenters. The offeror will provide administrative and organizational support including but not limited to webinar set-up and day-of management, webinar participant registration and management, virtual event agenda and timing preparation, and coordination among presenters to ensure a successful, interactive webinar event. The offeror can also suggest innovative or interactive methods of to facilitate a highly interactive virtual webinar.

The offeror will propose technical learning solutions to maximize the impact of the events, including the agenda, speaker list, and engagement techniques. The offeror will respond to RTI's comments on initial learning designs for each event and implement the program as agreed upon.

Please see **Attachment C** for details and requirements for the Statement of Work.

Deliverables, Timelines, Special Terms and Conditions:

Please provide estimated costs, description of services offered, and past performance examples of facilitation and management of previous webinars or other related virtual events/activities.

Pricing

Please see **Attachment D** for suggested budget template. Alternate budget templates may be used. Please provide budget in Microsoft Excel format.

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 Road
Durham, NC 27709 United States

(insert full address of the office)

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

The Bill & Melinda Gates 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

Lauren Edwards

(insert name of procurement officer)

at this email address:

Laedwards@rti.org

(insert email address of the procurement officer).

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

June 2, 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.**

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: