

Request for Proposal (RFP)

Subject RFP #:	CATALYZE-217772-Edu-2021-0243 (Readvertised)
RFP Issue Date:	January 7, 2022
Terms of Reference / Specifications:	Market Mapping and Landscape Analysis on Early Childhood Care and Education
Project	CATALYZE Innovative Blended Finance
The Company	Palladium International, LLC
Country of Performance	Global
Closing Date and Time	January 31, 2022
Questions Deadline	<input checked="" type="checkbox"/> Accepted at catalyze.procurements@thepalladiumgroup.com by January 14, 2022 at 17:00 EDT <input type="checkbox"/> N/A
Details for Submission	Submissions will be accepted: Electronically: email to catalyze.procurements@thepalladiumgroup.com
Offer Validity Period	Two (2) months

Thank you for your interest in the above procurement. As implementer for the CATALYZE Innovative Blended Finance Project funded by United States Agency for International Development (USAID), Palladium invites you to submit a proposal for the scope of work attached in Attachment A. Your proposal must be valid for the Validity Period stated above. Both individuals and firms are qualified to submit an offer in response to this solicitation.

Please email your notice of intention to submit a proposal by the Questions Deadline. Answers to questions shall be distributed to all offerors that have indicated an intention to submit a proposal by the deadline.

Please submit your proposal in accordance with the Details for Submission above by the Closing Date and Time. This RFP in no way obligates Palladium to award a contract nor does it commit Palladium to pay any cost incurred in the preparation and submission of a proposal. Palladium bears no responsibility for data errors resulting from transmission or conversion processes.

Yours sincerely,

CATALYZE Procurement Team

Terms and conditions

1. Proposal Conditions

By submitting a proposal, potential suppliers are bound by these terms and conditions. Potential suppliers must submit offers with all details provided in English and with prices quoted in a single currency.

2. Proposal Lodgement

The Company may grant extensions to the Closing Time at its discretion. The Company will not consider any quotes received after the Closing Time specified in the RFP unless the Company determines to do so otherwise at its sole discretion.

3. Evaluation

The Company may review all proposal to confirm compliance with this RFP and to determine the best proposal in the circumstances.

4. Alterations

The Company may decline to consider a proposal in which there are alterations, erasures, illegibility, ambiguity or incomplete details.

5. The Company's Rights

The Company may, at its discretion, discontinue the RFP; decline to accept any proposal; terminate, extend or vary its selection process; decline to issue any contract; seek information or negotiate with any potential supplier that has not been invited to submit a proposal; satisfy its requirement separately from the RFP process; terminate negotiations at any time and commence negotiations with any other potential supplier; evaluate proposals as the Company sees appropriate (including with reference to information provided by the prospective supplier or from a third party); and negotiate with any one or more potential suppliers.

6. Amendments and Queries

The Company may amend, or clarify any aspect of the RFP prior to the RFP Closing Time by issuing an amendment to the RFP in the same manner as the original RFP was distributed. Such amendments or clarifications will, as far as is practicable be issued simultaneously to all parties. Any queries regarding this RFP should be directed to the Contact Person identified on the cover page of this RFP.

7. Clarification

The Company may, at any time prior to execution of a contract, seek clarification or additional information from, and enter into discussions and negotiations with, any or all potential suppliers in relation to their proposals. In doing so, the Company will not allow any potential supplier to substantially tailor or amend their proposal.

8. Confidentiality

In their proposal, potential suppliers must identify any aspects of their proposal that they consider should be kept confidential, with reasons. Potential suppliers should note that the Company will only agree to treat information as confidential in cases that it considers appropriate. In the absence of such an agreement, potential suppliers acknowledge that the Company has the right to disclose the information contained in their proposal.

The potential supplier acknowledges that in the course of this RFP, it may become acquainted with or have access to the Company's Confidential Information (including the existence and terms of this RFP and the TOR). It agrees to maintain the confidence of the Confidential Information and to prevent its unauthorised disclosure to any other person. If the potential supplier is required to disclose Confidential Information due to a relevant law or legal proceedings, it will provide reasonable notice of such disclosure to the Company. The parties agree that this obligation applies during the RFP and after the completion of the process.

9. Alternatives

Potential suppliers may submit proposals for alternative methods of addressing the Company's requirement described in the RFP where the option to do so was stated in the RFP or agreed in writing with the Company prior to the RFP Closing Time. Potential suppliers are responsible for providing a sufficient level of detail about the alternative solution to enable its evaluation.

10. Reference Material

If the RFP references any other materials including, but not limited to, reports, plans, drawings, samples or other reference material, the potential supplier is responsible for obtaining the referenced material and considering it in framing their proposal. And provide it to the Company upon request.

11. Price/Cost Basis

Prices or costs quoted must show the tax exclusive price, the tax component and the tax inclusive price.

The contract price, which must include any and all taxes, supplier charges and costs, will be the maximum price payable by the Company for the Goods and/or Services.

12. Financial information

If requested by the Company, potential suppliers must be able to demonstrate their financial stability and ability to remain viable as a provider of the Goods and/or Services over the term of any agreement.

If requested by the Company, the potential supplier must promptly provide the Company with such information or documentation as the Company

reasonably requires in order to evaluate the potential supplier's financial stability.

13. Referees

The Company reserves the right to contact the potential supplier's referees, or any other person, directly and without notifying the potential supplier.

14. Conflict of interest

Potential suppliers must notify the Company immediately if any actual, potential or perceived conflict of interest arises (a perceived conflict of interest is one in which a reasonable person would think that the person's judgement and/or actions are likely to be compromised, whether due to a financial or personal interest (including those of family members) in the procurement or the Company).

15. Inconsistencies

If there is inconsistency between any of the parts of the RFP the following order of precedence shall apply:

- (a) these Terms and Conditions;
- (b) the first page of this RFP; and
- (c) the Schedule

so that the provision in the higher ranked document will prevail to the extent of the inconsistency.

16. Collusion and Unlawful Inducements

Potential suppliers and their officers, employees, agents and advisors must not engage in any collusive, anti-competitive conduct or any other similar conduct with any other potential supplier or person or quote any unlawful inducements in relation to their proposal or the RFP process.

Potential suppliers must disclose where proposals have been compiled with the assistance of current or former the Company employees (within the previous 9 months and who was substantially involved in the design, preparation, appraisal, review, and or daily management of this activity) and should note that this may exclude their proposal from consideration.

Potential suppliers warrant that they have not provided or offered any payment, gift, item, hospitality or any other benefit to the Company, its employees, consultants, agents, subcontractors (or any other person involved in the decision-making process relating to this RFP) which could give rise to a perception of bribery or corruption in relation to the RFP or any other dealings between the parties.

17. Jurisdiction

This RFP shall be subject to the laws of the District of Columbia, United States of America. The language of the arbitration will be English.

The Potential Supplier and the Company will use their best efforts to settle amicably any dispute, controversy, or claim arising out of, or relating to

this RFP or the breach, termination, or invalidity thereof.

If no agreeable settlement can be found, any dispute, controversy, or claim arising out of or relating to this RFP or the breach, termination, or invalidity thereof, shall be settled by mediation through the American Arbitration Association by filing a request for mediation with the AAA and the other party. The Parties will be bound by any arbitration award rendered as a result of such arbitration as the final adjudication of any such dispute.

Company Information

Palladium is a global leader in the design, development and delivery of Positive Impact — the intentional creation of enduring social and economic value. We work with corporations, governments, foundations, investors, communities and civil society to formulate strategies and implement solutions that generate lasting social, environmental and financial benefits.

Project Background

The CATALYZE Blended Finance Mechanism is a \$250 Million, 8-year contract (5-year base period, with a single 3-year option period) which uses a facilitated partnership model to craft solutions to crowd in \$2 Billion in blended finance in USAID partner countries. The USAID CATALYZE EduFinance program develops private sector partnerships to facilitate innovations in financing and service delivery that increase access to low-cost, quality education. Blended finance - private capital leveraged with funding from USAID – mobilized by CATALYZE EduFinance will address the substantial funding gap to respond to the global need for increased access to quality education.

The COVID-19 pandemic has catapulted the issue of care of children into the global spotlight. Care of children can span a wide range of models, ranging from home-based care to center-based care (including community-based care, faith-based care, privately provided care or publicly supported care), to informal or family arrangements. USAID's CATALYZE EduFinance activity is preparing to invest in early childhood care and education to increase both quality of and access to early childhood care, resulting in improved learning and development outcomes for children, increased women's economic opportunity and employment, increased workforce development opportunities and increased business productivity. As USAID moves into this area, there is a need to capture the state of play in early childcare and education both to inform USAID's broader strategic approach and to make critical investment decisions.

Purpose

The assessment will help USAID understand the broader context in which it is operating and identify strategic opportunities for EduFinance investments in early childhood care and education where USAID's comparative advantage can be applied.

A complete scope of work is attached as Attachment A.

Type of Contract

Palladium intends to issue a Firm Fixed Price subcontract to the selected offeror.

Anticipated Contract Period of Performance

These services are expected to take place between February 20, 2022 and May 31, 2022.

Level of Effort:

The anticipated level of effort of the consultant/subcontractor is a total of 320 hours between (February 20, 2022 – May 31, 2022).

Location of Assignment:

This is a short-term technical assistance consulting/subcontract agreement for CATALYZE, which is based out of the Palladium offices of Washington, D.C. Most CATALYZE employees and teams continue to work remotely, so a remote work arrangement in other parts of the United States or in other countries may be considered. See the Instructions for Submission of Cost Proposal for travel assumptions.

Key Deliverables and Timeline

Deliverable #	Report and Deliverable	Acceptable Criteria	Deadline	Payment Amount
1	Workplan	Workplan: Gantt-style Microsoft Excel or Google spreadsheet as specified in Attachment A	1 week/5 business days from award date	10%
2	Outline of the landscape analysis	Microsoft Word or Google Doc as specified in Attachment A	3 weeks/15 th business days from award date	10%
3	Market mapping and landscape analysis paper	A 5–10-page written report (excluding Annexes) in Microsoft Word or Google Docs as specified in Attachment A	5 weeks/25 th business days from award date	10%
4	Pitch deck	10-15 slides using Microsoft PowerPoint or Google Slides as specified in Attachment A	6 weeks/30 th business days from award date	10%
5	Summary of Key Findings slide deck	15-20 slides using Microsoft PowerPoint or Google Slides as specified in Attachment A	7 weeks/35 th business days from award date	10%
6	Draft Report and Draft Presentation Slides	Microsoft Word and Microsoft PPT Presentation or Google Slides as specified in Attachment A	8 weeks/40 th business days from award date	20%
7	Final paper, presentation slides and co-design and co-creation roadmap	Microsoft Word and Microsoft PPT Presentation or Google Slides as specified in Attachment A	9 weeks/45 th business days after receipt of Draft Report Feedback	30%

Instructions to Offerors

Separate technical and cost proposals must be submitted by email no later than the time and date specified on the cover page.

1. Technical Proposal

For the technical proposal, the offeror must submit:

(a) Cover letter with the following information:

1. Firm contact info and address
2. Type of company or organization
3. DUNS Number (Company must have a DUNS number or obtain one within 5 days of being notified of selection)
4. Signed by an authorized representative of the company

(b) Background on the firm and relevant expertise (max 2 pages)

(c) Past Experience Information/Capability Statement

(d) Technical Proposal & Management Approach

(e) Proposed work plan showing how the firm would execute this project including a timeline (max 2 pages)

(f) Description of relevant projects previously performed by the firm, demonstrating expertise in market assessments (max 4 pages)

(g) Contact details for three referees (max 1 page)

(h) All supporting documentation specified below in the pass/fail evaluation criteria.

2. Cost Proposal

Offerors must submit a detailed budget breaking out all costs associated with the completion of this work. Cost elements to incorporate may include, but are not limited to: labor hours, transport and/or communication costs to conduct stakeholder interviews, indirect rates with substantiation, any applicable taxes or fees. Please see Attachment B for a sample budget template. The cost proposal consists of:

- (a) Budget in local currency and in Microsoft Excel with all formulas visible (unlocked)
- (b) All prices are to be inclusive of relevant taxes
- (c) Offeror should budget for: labor costs to complete the scope of work, communications costs to complete stakeholder interviews (at this time, travel should only be included in accordance with local guidelines for COVID-19 travel restrictions).
- (d) Accompanying Word Document/Budget Narrative with all cost assumptions and explanations**

3. Eligibility Documentation

All offers should be accompanied by supporting documentation to evaluate the offerors eligibility as stated in the Evaluation and Award process below. In addition, the selected offeror will be required to complete the Due Diligence Questionnaire and provide a DUNS number within 5 days of being notified of selection.

Submission of Offers

Electronic proposals must be submitted by sending a technical proposal and a cost proposal with the RFP number in the subject line. The RFP No. is: **CATALYZE-217772-EDU-2021-0243**. Please ensure all required documents are attached.

Offers received past the deadline stated on the cover page will be deemed non-responsive and will not be considered for award.

Evaluation and Award Process

Proposals will be evaluated using a best value trade off methodology. This is a three-stage process.

- (1) The first set of criteria is graded on a pass/fail basis. All proposals will be evaluated to see if the offeror meets the minimum eligibility qualification criteria. **Please provide supporting documentation for a, d, and e. If you are a firm and have a DUNS number, please include it in your proposal. If you do not have it, we will request for it within 5 days of being notified of selection.**

	Requirement	Supporting Documentation
(a)	For Firms: Must be a registered as a legal entity for a minimum of one year. For Individuals: must provide proof of citizenship or legal residency	Firms: Copy of certificate or articles and memorandum of associate and Documentation of business registration Individuals: Copy of passport or other government-issued ID with photo
(b)	For Firms Only: DUNS number	Provide the DUNS number or proof of applying for the DUNS number
(c)	Must not have any active exclusions from the working with the US government (www.sam.gov), the UN (Sanctions List), or the US Department of the Treasury Office of Foreign Asset Control	N/A– Palladium will conduct a search of these databases as part of the due diligence process
(d)	Company cannot be a foreign government-controlled organization	Submit a certification signed by firm’s legal representative
(e)	Company must not have controlled interest held by a government, government agency, or agent thereof	Submit a certification signed by firm’s legal representative

(2) If these minimum criteria are met, the offer's technical proposal will be evaluated as follows:

Evaluation Criteria		Points
Experience	Prior experience in conducting comparable assessments, including sample reports demonstrating market sizing skills, analysis skills to identify market opportunity and technical writing skills	25
Team	Assessment team expertise in:	
	a. working with external stakeholders including the private sector, academia, and non-profit organizations is preferred.	20
	b. Care economy, inclusive economic growth, gender equality and women's economic empowerment, early childhood development, employment, entrepreneurship, finance, and markets.	15
	c. Candidates with proven skills in leadership, coordination, and program management and implementation is preferred, including: <ul style="list-style-type: none"> i) Skills in oral and written communication, facilitation, and other skills needed to prepare high-quality deliverables. ii) Skills in coordination to achieve deliverables. iii) The ability to effectively analyse and solve problems and to evaluate and resolve situations that represent obstacles to delivering high-quality deliverables. 	15
Background/ context	Background section demonstrating understanding of the assessment and context, identifying key issues and stakeholders that must be addressed in the assessment	15
Plan	Provide a work plan with a proposed timeline for completing key tasks, and a proposed list of stakeholders to be interviewed	10
	TOTAL	100

(3) The offeror's cost proposal will be evaluated for:

- Proposed total price, relative to other offers received
- Realism and reasonableness of the work to be performed
- Price reflects a clear understanding of the requirements
- Price is consistent with various elements of the technical proposal
- Compliance with USAID cost principles (select one: Non-profit entities – Cost Principles in 2 CFR 200 Subpart E or For profit entities – Cost Principles in FAR Part 31)

Palladium reserves the right to award under this solicitation without further negotiations. The offerors are encouraged to offer their best terms and prices with the original submission.

PROCUREMENT INTEGRITY AND ETHICS

It is Palladium's Policy that no gifts of any kind and of any value be exchanged between vendors/contractors and Palladium personnel. Discovery of the same will be grounds for disqualification of the vendor/contractor from participation in any Palladium's procurements and may result in disciplinary actions against Palladium personnel involved in such discovered transactions.

Resulting Award

This RFP in no way obligates Palladium to award a contract. Palladium may opt to select multiple offers in response to this RFP.

Any contract/purchase order resulting from this solicitation must be signed by both parties in order to be considered valid and in force. All costs associated with, but not limited to, production, preparation and/or delivery

of goods or services, including deliveries, accepted by Palladium staff, without a fully executed (signed by both parties) contract/purchase order, are at the vendor's risk only. Palladium shall not pay for any costs, without limitation, associated with production, preparation, or delivery of goods and/or services under this or any other contract/purchase order, which has not been signed by both parties.

If your proposal is successful, you will be required to enter into the Company's standard contract for the types of goods or services being provided. In the provision of the Goods and Services, you will be required to comply with the Company's policies, including (without limitation) its Business Partner Code of Conduct and any relevant client terms and conditions. Potential suppliers must also comply with the Company's Business Partner Code of Conduct in the submission of any proposals pursuant to this RFP.

If you are bidding as part of a joint venture, partnership or similar, please make this clear in your submission. Likewise, if you propose to subcontract any part of the goods or services provision, then disclose this fact within your submission. The Company may require additional information from you and approval for subcontracting will not be automatic as subcontractors will be subject to Palladium's Due Diligence process.

Attachment A: Scope of Work

Market Mapping and Landscape Analysis on Early Childhood Care and Education

Company Overview:

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Geography:

Globally in lower- and middle-income USAID presence countries with the aim to select three key countries.

Goal, Phase 1:

1. Global landscape analysis of proven models
2. Market assessment in select countries

The goal of this market assessment and landscape analysis exercise is to help USAID understand the broader context in which it is operating and identify strategic opportunities for EduFinance investments in early childhood care and education where USAID's comparative advantage can be applied. The analysis and market assessments will feed into shaping the activity, which will be co-designed with relevant stakeholders. These documents will also serve as a public good to share with other stakeholders and be distributed through appropriate communication channels, such as Edu-Links and other Early Childhood Development networks. The Consultancy/subcontract may have the option to be extended to steer CATALYZE through a Phase 2 co-design and co-creation workshop for a potential activity.

Deliverables and Specifications:

The Consultant/Subcontractor will submit the deliverables as per below specifications:

All written deliverables will be emailed to the designated Palladium contact by End of Day (local time) on the date specified in the contract agreement and will be in English, single-spaced Microsoft Word or Google Docs in 11-point Arial or Times New Roman font. The deliverables must be free of spelling and grammatical errors.

1. **Workplan:** Work plan will include a timeline for completing key tasks in a gantt-chart format.
2. **Outline:** Working outline of the market mapping and landscape analysis. This document should be submitted prior to the completion of the first draft for USAID review and comments.
3. **Market mapping and landscape analysis paper:** A 5-10 page written report (excluding Annexes) in Microsoft Word or Google Docs.

- Gather key insights on the state of the field of early childcare and education from Funders, Implementers, Thought Partners, Thought Products, Status of Work, Opportunities, Types of Care, Geographies, and other relevant information. This will build from initial USAID scoping efforts and relevant investments under EduFinance and other USAID programming.
 - Summarize the key content of the available thought pieces on child care, particularly synthesizing promising approaches and models to deliver quality and sustainable childcare and education to underserved communities.
 - Identify common challenges, setbacks or lessons learned from other early childcare and education investments.
 - Identify potential opportunities, specifically geographic scope, promising models to pilot/scale and key organizations to partner with.
 - Formulate a recommendation to USAID, particularly identifying countries and key entry points and opportunities where USAID's comparative advantage can be applied.
 - Identify and provide justification of the key measurable results of interest to USAID.
 - Establish process for potential co-funders, including USAID missions to identify potential opportunities in their interest, through co-creation or another avenue.
 - Propose next steps on the process and a programmatic design, toward building an investment in childcare and education.
4. A **pitch deck** with 10-15 slides using Microsoft PowerPoint or Google Slides describing USAID's vision and broader strategic approach in early childcare and education investment, both to inform and to invite key stakeholders for collaborating with USAID on EduFinance investment.
 5. A **slide deck** with 15-20 slides using Microsoft PowerPoint or Google Slides summarizing key findings and recommendations from the market mapping and landscape analysis.
 6. A **co-design and co-creation roadmap**: A 1–2 page written document outlining key steps for involving Palladium, USAID and key stakeholders (e.g. Funders, Implementers, Thought Partners, etc) to collaborate on a EduFinance investment in early childcare and education.