

Request for Proposal (RFP)

Subject RFP #:	RFP-CATALYZE-PHIL-2023-0003
RFP Issue Date:	October 9, 2023
Terms of Reference / Specifications:	Peer Mentorship Training and Facilitation for Young Adults and Adolescents
Project	CATALYZE Innovative Blended Finance
The Company	Palladium International, LLC
Country of Performance	Philippines
Closing Date and Time	November 10, 2023, 5:00pm Philippine Time; 5:00am EST
Questions Deadline	<input checked="" type="checkbox"/> Accepted at catalyze.procurements@thepalladiumgroup.com by October 25, 2023, 5:00pm Philippine Time; 5:00am EST <input type="checkbox"/> N/A
Bidders' Conference	<input type="checkbox"/> November 6, 2023, 9:00am Philippine Time; 9:00pm EST <input type="checkbox"/> N/A
Details for Submission	Submissions will be accepted: <input type="checkbox"/> Electronically: email to catalyze.procurements@thepalladiumgroup.com
Offer Validity Period	90 Days

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 offerors to submit a proposal for the scope of work attached in Annex A. Your proposal must be valid for the Validity Period.

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 proposals 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 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 unauthorized 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 beginning 2019, with a single 3-year option period) which uses a facilitated partnership model to craft solutions to crowd in \$2 billion in blended finance (i.e., blended concessional and commercial finance) to USAID partner countries and initiatives. CATALYZE allows USAID Bureaus and Missions to efficiently deploy investment facilitation solutions that respond to the needs of specific sectors, issues, and geographies.

In the Philippines, CATALYZE has developed an activity to promote sustainable employment and improve health outcomes for vulnerable youth. The project will work with young adult (ages 18-24) members of Pantawid Pamilyang Pilipino Program (4Ps) households who have completed senior high school and desire to enter the labor force.¹ With a focus on women, CATALYZE will provide skills training and employment opportunities, and integrated a health curriculum, and improve linkages to health services through various platforms.² Furthermore, CATALYZE will engage adolescent girls (ages 14-18) belonging to 4Ps households through a peer mentorship program to promote confidence, life skills, and knowledge of healthy behaviors. Thus, CATALYZE's approach to workforce and health development aims to ensure both 4Ps adolescents and young adults are equipped with essential skills and knowledge to sustain healthy livelihoods.

Purpose

The purpose of this RFP is to identify an organization to, alongside CATALYZE staff, co-develop or adapt a peer mentorship curriculum (targeted to girls aged 14-18) and to train young adult CATALYZE participants (women aged 18-24) to deliver the curriculum and act as peer mentors.³ Curricular topics, contextualized to the target age group, will include but are not limited to sexual and reproductive health, menstrual hygiene, relationship management, self-confidence, and communication. The selected organization must ensure peer mentors are knowledgeable in these areas and have the requisite communication and leadership skills. In addition, the selected organization should provide supplemental support to mentors and mentees as needed (e.g., responsively addressing questions as they arise). Furthermore, the organization must intervene in cases where an adolescent's needs are beyond a mentor's proficiency (e.g., in situations of domestic abuse or early pregnancy).

By the end of the pre-mentorship training, mentors should feel confident in the basic skills learned to serve as a role model for the younger participants. This, among other indicators, will be regularly reported on in the

¹ The Pantawid Pamilyang Pilipino Program is a government conditional cash transfer program for low-income households overseen by the Department of Social Welfare and Development.

² While the mandate of this buy-in prioritizes women and girls, men and boys will not be excluded from the proposed activities. Marketing, outreach, and programmatic design will focus on women's needs and considerations. The language in this document reflects this perspective, so although boys and men are not mentioned they will still be welcomed as program participants.

³ Please note the overlap in age. Women aged 18 years old who are still in school will be eligible to participate as mentees, while women aged 18 who are out of school will be eligible to participate as mentors.

course of implementing the selected organization(s) Monitoring, Evaluation, and Learning Reporting plan submitted under item (e) in the Technical Proposal section below. All participants will belong to 4Ps households, therefore the selected organization must understand the unique needs of working with marginalized populations, such as low-income households, women, and young parents.

A complete scope of work is attached as Annex A.

Type of Contract

Palladium intends to issue a Pay-For-Results (P4R) based Firm Fixed Price subcontract to the selected offeror. Palladium expects to award one or more subcontracts under this RFP. Under P4R, the principle or funder sets financial incentives for an entity to deliver predefined outcomes and rewards achievements of the results upon verification. Once awarded, CATALYZE and the offeror will develop milestones for the offeror to achieve based on the proposed deliverables, participants trained, or other factors.

An illustrative deliverables and payments schedule may be found under Annex B.

Anticipated Contract Period of Performance

November 2023 – September 2024 with the option for continuation year by year. CATALYZE will evaluate the offeror's performance to determine contract renewal.

Place of Performance

The activities to be performed under this contract will take place in Metro Manila and/or Region IV-A.

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. All submitted materials must be in English.

Electronic proposals must be submitted by sending two separate emails to catalyze.procurements@thepalladiumgroup.com, one for technical proposal and one for cost proposal with the RFP number in the subject lines. Ensure all required documents are attached. The RFP number can be found on the cover page.

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

Palladium may contact offerors for clarifying questions.

The selected offeror will be required to complete the Due Diligence Questionnaire (attachment 1) and provide a UEI number within 5 days of being notified of selection.

Technical Proposal

The technical proposal shall follow the structural format set forth below:

- (a) Cover letter containing:
 - 1. Organization's contact information and address
 - 2. Type of enterprise or organization
 - 3. Unique Entity Identification (UEI) Number (organization must have a UEI number or obtain one within 5 days of being notified of selection)
 - 4. Signature of an authorized representative of the organization
- (b) Background and overview of the firm (max 1 page)
- (c) Technical Proposal (max 5 pages) containing:
 - 1. Outline of the approach, including:
 - i. Proposed content of peer mentorship curriculum
 - ii. Proposed forms and methods of pre-mentorship training

- iii. Any additional support, resources, and tools to be provided to both mentors and mentees, including a plan to handle referrals of sensitive cases (e.g., situations of domestic abuse, early pregnancy, mental health crisis, etc.)
 - 2. Implementation timeline and illustrative workplan
- (d) Management Approach (max 2 pages)
- 1. Identify the Activity Manager and up to 2 additional personnel undertaking important roles in the activity, and briefly describe their roles and prior demonstrated success. It is recommended but not required that the offeror indicate the personnel responsible for module creation and delivery of pre-mentorship training.
 - 2. Provide CVs for the Activity Manager and up to 2 additional personnel (**CVs do not count towards page limit and should be included as a separate annex**).
 - 3. Identify and describe the roles of any proposed partners or subcontractors.
- (e) Monitoring, Evaluation, and Learning Reporting (max 2 pages)
- 1. Approach for data collection, quality assurance, reporting, and compliance on the following illustrative indicators. Offerors may propose additional indicators.
 - i. Number of individuals trained as peer mentors.
 - ii. % increase in knowledge of healthy behaviors among mentors and mentees
 - iii. % increase in feelings of confidence/self-esteem among mentors and mentees
 - iv. % increase in leadership and communication skills among mentors
- (f) Gender Mainstreaming Plan (max 1 page)
- 1. Gender mainstreaming involves identifying and addressing the unique barriers a gender may face in accessing services and participating. The offeror should consider the barriers female mentors and mentees may encounter and propose appropriate solutions.
- (g) Past Experience Information/Capability Statement (max 2 pages)
- 1. Briefly describe the offeror's (as well as any partners') previous work, experience, and demonstrated success in achieving activity goals.

Cost Proposal

Offerors must submit a cost proposal. CATALYZE will provide a budget template upon request through catalyze.procurements@thepalladiumgroup.com. The cost proposal consists of:

- (a) Budget in Microsoft Excel with all formulas visible (unlocked)
- (b) Accompanying Word Document with all cost assumptions and explanations (e.g., salaries, travel, etc.)
- (c) Proposed duration of technical components
- (d) Illustrative Deliverables and Payment Schedule (see Annex B for example)

Key assumptions

- Budget in USD
- All prices are to be inclusive of relevant taxes.
- Separate unit cost and number of units
- Break down activity costs into as much detail as possible.
- Offeror should budget for:
 - Defense Base Act (DBA) insurance in accordance with FAR 52.228-3, as applicable.
 - Materials provided to participants.

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. Offerors must meet the following minimum eligibility qualification criteria and provide supporting documentation:

	Requirement	Supporting Documentation
(a)	Must be a registered legal entity in the Philippines for a minimum of one year	Copy of certificate or articles and memorandum of associate

(b)	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
(c)	Must not be affiliated with any political party nor engaged in any partisan activities	N/A

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

Evaluation Criteria	Documents Evaluated	Points
Soundness and reasonableness of technical approach	Technical Proposal, Management Approach	40
Alignment with CATALYZE's peer mentorship goals, Guiding Principles, and criteria for successful submissions (Annex A)	Technical Proposal	10
Offeror's demonstrated capability to carry out proposed approach	Technical Proposal, Management Approach, Past Experience Information/Capability Statement	30
Experience and considerations working with the following marginalized populations: youth, low-income, women, young parents	Past Experience Information/Capability Statement	20
TOTAL		100

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

- Proposed total price
- Realism and reasonableness of the work to be performed
- Personnel proposed.
- 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 the proposal is successful, the offeror 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, the offeror 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 the offeror is bidding as part of a joint venture, partnership or similar, please make this clear in the submission. Likewise, if the offeror proposes to subcontract any part of the goods or services provision, then disclose this fact within the submission. Palladium may require additional information from the offeror and approval for subcontracting will not be automatic as subcontractors will be subject to Palladium's Due Diligence process.

Attachments

Please review the additional documentation and proposed contract terms and conditions which should be given consideration when preparing the offeror's proposal. By submitting a bid, the offeror will certify that that it is in agreement with the contract terms and conditions as included in this solicitation and that all prices include all aspects of the required compliance with the terms and conditions of the proposed contract.

Attachment 1- Due Diligence Questionnaire

Attachment 2- FFATA Form (will be required only for successful offeror, where applicable – included for awareness only)

Palladium Business Partner Code of Conduct and Child Protection Guidelines can be downloaded in full at: <http://www.thepalladiumgroup.com/policies> or request through email from Catalyze.procurements@thepalladiumgroup.com

Annex A: Scope of Work

CATALYZE Philippines invites offerors to submit proposals to train young women to serve as peer mentors to younger adolescents.

The objectives of this call for proposals are threefold:

1. To co-develop or adapt a peer mentorship curriculum i.e., the topics, modules, and materials that will be delivered to adolescent girls aged 14-18. The selected offeror may develop its own curriculum or adapt existing curriculum, but topic areas should include sexual and reproductive health, menstrual hygiene, relationship management, self-confidence, and communication skills.
2. To train young women (ages 18-24) to act as qualified peer mentors. Offerors should clearly identify which topics may be delivered directly by mentors and which topics will require expert facilitation. Offerors are invited to suggest their own duration of pre-mentorship training.
3. To oversee and facilitate mentorship sessions. It is envisioned that peer mentorship activities will occur over a 4-month period, with at least one in-person, facilitated activity per month. Mentors and mentees are encouraged to supplement these activities with virtual or in-person communication as needed, and offerors are invited to propose solutions to nurture mentor-mentee relationships.

Annual targets for peer mentorship are modest at 60 mentors and 120 mentees (2 mentees per mentor) across two pilot sites (i.e., 30 mentors and 60 mentees per pilot site). Cohorts will occur on a 4-month basis, with each cohort composed of 10 mentors and 20 mentees per pilot site.

By the end of the pre-mentorship training, mentors should feel confident in the basic skills learned to serve as a role model for adolescent mentees. Mentors should also feel confident to ask for additional advice and resources, especially in the case of sensitive situations that require referral to CATALYZE staff/selected offeror. Offerors should clearly outline a plan to ensure that mentors are not over-burdened with psychosocial stress and identify strategies to provide additional support (e.g., hotline, chatbot, digital resources) including an effective referral mechanism for sensitive cases.

By the end of the mentorship program, mentees should demonstrate increased knowledge in the topic areas and report increased feelings of self-confidence.

This RFP is not prescriptive, rather, we encourage innovative, cost-effective solutions to delivering peer mentorship activities.

CATALYZE encourages offerors to clearly emphasize the following Guiding Principles:

Improve Healthy Adolescent Behavior and Decision-Making. CATALYZE supports initiatives that improve healthy decision-making and behavior among adolescents. A chief concern in the Philippines is early pregnancy, which is driven by multiple complex factors including lack of knowledge, stigma, and shame. Successful offerors must demonstrate they are able to improve adolescents' knowledge and ability to navigate sensitive topics, including their ability to advocate for themselves to trusted adults, partners, and healthcare providers. While sexual and reproductive health are priorities for this activity, psychosocial support, general life skills, and self-confidence are additional topic areas that should not be overlooked.

Understand the 4Ps. CATALYZE has an exclusive focus on adolescents and young adults belonging to 4Ps households. Successful proposals must demonstrate a sound understanding of the unique and multidimensional challenges this marginalized population faces and propose solutions that are responsive to their needs.

Innovate and Scale. CATALYZE seeks initiatives that would not be possible without donor support. We will not fund existing operations or "business as usual."

Adapt. To ensure peer mentorship curricula, pre-mentorship training, and facilitation of peer mentorship are responsive to participant, stakeholder, and program needs, the successful offeror must be willing and able to collaborate with CATALYZE and adjust activities as needed.

Successful submissions will demonstrate:

- A plan to co-develop or adapt a peer mentorship curriculum, identifying topic areas, modules, or tools that peer mentors will be trained on.
- How young adults will be trained to become peer mentors through active, engaging, and realistic modules.
- A plan to identify mentors' potential strengths and weaknesses and provide guidance to enhance areas of weakness.
- How roles and responsibilities are clearly communicated to mentors such that they are confident to ask for additional help and resources, particularly to address sensitive situations.
- A plan to implement an effective referral system, with examples, for when an adolescent's situation requires professional support to be facilitated by the offeror/CATALYZE staff.
- The ability to track, monitor and report on the youth benefiting from the program to assess ongoing performance and project outcomes.
- Methods to enable a participatory, feedback-driven approach to adapt and improve activities in real-time.

Annex B: Illustrative Deliverables and Payment Schedule

The payment structure of this contract will be a mix of deliverables-based fixed payments (approximately 40% of contract value) and performance-based payments (approximately 60% of contract value). CATALYZE will negotiate the final structure with the selected offeror(s), ensuring that performance metrics are clearly defined and measurable. Offerors are highly encouraged to propose their own deliverables and payment schedule.

Deliverable	Deadline	Payment Amount
Fixed/Milestone-based Deliverables		
Outline of peer mentorship curriculum and proposed structure of delivery	3 weeks from award date	20% of contract value
Draft pre-mentorship training materials and proposed structure of delivery	5 weeks from award date	20% of contract value
Final report collecting outcomes, student evaluations, and lessons learned	1 month prior to end of contract	10% of contract value
Performance-based Deliverables		
Number of young adult participants who complete pre-mentorship and peer mentorship program	6 weeks after award date + ongoing	\$\$ per participant trained, ceiling of 25% of contract value
Number of adolescent participants who complete peer mentorship program	6 weeks after award date + ongoing	\$\$ per participant placed, ceiling of 25% of contract value