

## Amendment to Request for Proposal

**Amendment number: 3**

**Reference Request for Proposal Number: RFP-CATALYZE-PHIL-2023-0005**

**Amendment effective date: November 30, 2023.**

**Description of Amendment:**

1. This amendment serves to modify the Closing Date and Time on Page 1 of the RFP from October 20, 2023, 5:00pm Manila; 5:00am EST to **February 16, 2024, 5:00pm Manila; 5:00am EST.**
2. This amendment serves to modify the Anticipated Period of Performance, on Page 5 from January 2024 – September 2024 to **February 2024 – September 2024.**
3. This amendment serves to modify the **Technical Proposal on Page 5 and Page 6.**
4. This amendment serves to modify the **Scope of Work on Annex A.**

## Request for Proposal (RFP)

Subject RFP #:	RFP-CATALYZE-PHIL-2023-0005
RFP Issue Date:	September 21, 2023
Terms of Reference / Specifications:	Social Preparation for Young Adult 4Ps
Project	CATALYZE Innovative Blended Finance
The Company	Palladium International, LLC
Country of Performance	Philippines
Closing Date and Time	February 16, 2024, 5:00pm Manila; 5:00am EST
Questions Deadline	<input checked="" type="checkbox"/> Accepted at <a href="mailto:catalyze.procurements@thepalladiumgroup.com">catalyze.procurements@thepalladiumgroup.com</a> by January 12, 2024, 2023 (5pm Manila; 5AM EST) <input type="checkbox"/> N/A
Bidders' Conference	<input checked="" type="checkbox"/> N/A
Details for Submission	Submissions will be accepted: <input checked="" type="checkbox"/> Electronically: email to <a href="mailto:catalyze.procurements@thepalladiumgroup.com">catalyze.procurements@thepalladiumgroup.com</a> Proposals will be accepted and reviewed on a rolling basis through the closing date.
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 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 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.<sup>1</sup> With a focus on women, CATALYZE will provide skills training and employment opportunities, an integrated health curriculum, and linkages to health services through various platforms.<sup>2</sup> Furthermore, CATALYZE will engage adolescent girls (ages 14-18) belonging to 4Ps households through a 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 organizations that will engage pilot site communities to socialize the CATALYZE program and support the participant enrolment process. Activities to undertake this social preparation include but are not limited to engaging and coordinating with key community leaders, hosting community orientation/enrolment events, and overseeing communications and marketing efforts (e.g., social media). In addition to sharing the purpose and goals of the CATALYZE activity, key messages may include destigmatizing family planning/reproductive health and supporting gender equity, particularly in the workplace. The selected organization must ensure their language and programming is sensitive to the concerns of the 4Ps, a marginalized community.

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

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<sup>1</sup> 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.

<sup>2</sup> 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.

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**

February 2024- 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 Pasig City, Metro Manila and Naic, Cavite in the Philippines.<sup>3</sup>

### **Instructions to Offerors**

All submitted materials must be in English.

Electronic proposals must be submitted by sending two separate emails to [catalyze.procurements@thepalladiumgroup.com](mailto: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.

### **1. Technical Proposal**

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

- (a) Cover letter with the following information:
  - 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. Signed by an authorized representative of the organization.
- (b) Background and overview of the firm (max 1 page)
- (c) Technical Proposal (max 3 pages)
  - 1. Outline of the approach, including:
    - i. Proposed strategy for stakeholder engagement across community and LGU level. The selected organization will be expected to coordinate with the relevant LGU offices and community partners to schedule social marketing, orientation, and application activities. Proposed plan to conduct events and ensure consistent attendance of target participants.
    - ii. Proposed process for application of target participants, including draft application forms and modalities for application.
    - iii. Proposed social marketing strategies of the project and its components including identification of key messages, and the development of communication materials including but not limited to FAQs, posters, etc., in adherence with CATALYZE and USAID Branding and Marking Plan.

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<sup>3</sup> Naic is still being finalized.

2. Implementation timeline and illustrative workplan
  3. Documentation templates and corresponding consent forms (for photos and videos)
- (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 meeting with stakeholders and event organizing.
  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 Framework (max 2 pages)
1. Approach for data collection (at minimum baseline and endlines assessments), quality assurance, reporting, and compliance on the following illustrative indicators (offerors may propose additional indicators):
    - i. Number of events held and number of attendees.
    - ii. Number of attendees who apply for participation.
    - iii. Number of local leaders/organizations engaged.
  2. Anticipated results for the aforementioned indicators
  3. Approach to collaboration, learning, and adaptation
- (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 participants may encounter and propose appropriate solutions.
  2. CATALYZE requires 60% of participants are female. The offeror should describe methods, including additional support and targeted outreach to meet this requirement.
- (g) Experience Information/Capability Statement (max 2 pages)
1. Briefly describe the offeror's (as well as 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](mailto:catalyze.procurements@thepalladiumgroup.com). The cost proposal shall consist 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 the activity 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.
  - Activity costs

### 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
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(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 ( <a href="http://www.sam.gov">www.sam.gov</a> ), 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
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
Alignment with CATALYZE's Guiding Principles and criteria for Successful Submissions (Annex A)	Technical Proposal	10
<b>TOTAL</b>		<b>100</b>

(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 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](mailto:Catalyze.procurements@thepalladiumgroup.com)



## Annex A: Scope of Work

CATALYZE invites offerors to submit proposals to engage pilot site communities to socialize the CATALYZE program and support the participant enrolment process. We anticipate operating in two pilot sites: Pasig City, Metro Manila and Naic, Cavite. Annual enrollment targets are 600 participants per year, approximately 300 per site. We anticipate that program activities will occur in repeating 4-month cycles with social preparation events preceding each cycle (i.e., each enrollment cycle will have the goal of 100 participants per site). Social Preparation activities can occur on a rolling basis.

The social preparation activities have three main objectives: 1) to raise awareness among community members, potential participants, and their families about the CATALYZE program, its objectives, requirements, and benefits; 2) to encourage interested and eligible individuals to apply; and 3) to sensitize community members, potential participants, and their families to the sensitive health areas embedded in the program (i.e., reproductive health and family planning). As such, we expect the selected offeror to propose a multi-pronged approach to achieve these three objectives. The target audience of these social preparation efforts include community leaders who can champion and/or spread word of the program, Pantawid Familyang Pilipino Program (4Ps) parents, and young adult members of 4Ps households (18-24 years old).

Community orientation/registration events may take various forms and offerors are encouraged to present creative solutions (e.g., job fairs, mini-lectures, barangay town halls, etc.).

Any communication materials and products shall be in accordance with CATALYZE and USAID branding guidelines.

This RFP is not prescriptive, rather, we encourage innovative, cost-effective solutions to improving youth health outcomes.

CATALYZE encourages offerors to clearly emphasize the following **Guiding Principles**:

**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.” We seek to accelerate and scale market-driven innovations in job training and placement.

**Adapt.** To ensure social preparation activities 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:

- How the offeror will engage and coordinate with key community leaders and utilize their platforms to raise awareness and host community events.
- An effective strategy to meet the target number of enrollees, including the specified gender breakdown.
- A plan for effective messaging and communications (e.g., social media).
- How the following sensitive topics will be bridged with community leaders and addressed through messaging: family planning/reproductive health and supporting gender equity, particularly in the workplace.
- How the offeror will ensure their language and programming are sensitive to the concerns of the 4Ps, a marginalized community.

## 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
<b>Fixed/Milestone-based Deliverables</b>		
<b>Detailed social preparation plan, with estimated timeline</b>	2 weeks from award date	30% of contract
<b>Drafts of any communication materials (e.g., invitations, advertisements)</b>	1 month from award date	20% of contract
<b>Final report collecting outcomes, student evaluations, and lessons learned</b>	1 month prior to end of contract	15%
<b>Performance-based Deliverables</b>		
<b>Number of attendees who apply for participation in program</b>	6 weeks after award date + ongoing	\$\$ per participant, ceiling of 35% of contract