

## Amendment to Request for Proposal

**Amendment number:** 2  
**Reference Request for Proposal Number:** RFP-CATALYZE-INDO-2023-0184

**Amendment effective date:** January 24, 2024

**Description of Amendment:**

1. This amendment serves to modify the details of the scope of work (SOW) in the RFP. The SOW will now include a target number of individuals reached, at least 370 individuals per year.
2. This amendment serves to add the questions and answers from the bidders conference held January 16, 2024.

## Request for Proposal (RFP)

Subject RFP #:	RFP-CATALYZE-INDO-2023-0184
RFP Issue Date:	January 3, 2024
Terms of Reference / Specifications:	Crowdfunding Service Provider
Project	CATALYZE Innovative Blended Finance
The Company	Palladium International, LLC
Country of Performance	Indonesia
Closing Date and Time	February 2, 2024; 5:00pm Jakarta; 5:00am EST
Questions Deadline	Accepted at <a href="mailto:catalyze.procurements@thepalladiumgroup.com">catalyze.procurements@thepalladiumgroup.com</a> by January 12, 2024; 5:00pm Jakarta; 5:00am EST

	January 16, 2024; Location TBD; 3:00PM-4:30PM Jakarta time; google link: <a href="https://meet.google.com/xok-vkqa-phv">meet.google.com/xok-vkqa-phv</a> ,
Bidders' Conference	in-person location: Treasury Tower 59th Floor, District 8 SCBD Lot 28, Jl. Jend. Sudirman Kav 52 – 53, Jakarta, 12190
Details for Submission	Electronically: email to <a href="mailto:catalyze.procurements@thepalladiumgroup.com">catalyze.procurements@thepalladiumgroup.com</a>
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 you 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 and details of the bidder's conference 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 Lodgment

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 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 and Objectives

Palladium is implementing on behalf of the United States Agency for International Development (USAID) the CATALYZE Innovative Blended Finance Project (CATALYZE), a global initiative which uses a facilitated partnership model to craft solutions to crowd in \$2 billion in blended finance to USAID partner countries and initiatives.

In Indonesia, CATALYZE is supporting the national health insurance agency (*Badan Penyelenggara Jaminan Sosial-Kesehatan* - BPJS-Kes) to increase enrollment and re-enrollment of individuals, particularly informal sector workers, in the national health insurance scheme (*Jaminan Kesehatan Nasional* - JKN) to improve the health, wellbeing, and economic empowerment of vulnerable populations in Indonesia. Ultimately, CATALYZE aims to support Indonesia's efforts to achieve universal health care through increase in "effective" JKN coverage (i.e., membership status that facilitates the member to access health services). Through private sector partnerships, CATALYZE will:

- Mobilize the community to increase awareness of the value in JKN and willingness to pay for health insurance among informal sector workers;
- Increase locations and mechanisms for enrolment and payment and streamline access to the premium payment plan to ease informal sector workers' process to enrol and pay for JKN; and
- Work with private sector partners to mobilize resources for premium payments through crowdfunding, loans, and support for income generation.

Combined, these actions will help overcome immediate financial barriers while putting individuals on a path towards consistently paying their premiums in Indonesia.

## Purpose

The purpose of this Request for Proposals (RFP) is to procure one or more Crowdfunding Service Provider(s) to create an online marketing campaign and mobilize resources (donations) from domestic individuals and institutional donors for JKN premium payments. The Crowdfunding Service Provider must have the ability to receive funds from individuals and/or institutions, hold on to those funds for the period of the campaign, and to disburse the mobilized funds to a designated entity CATALYZE has identified for them to use to cover the JKN premiums of vulnerable population.

A complete scope of work is attached as Annex A.

## Type of Contract

Palladium intends to issue a Firm Fixed Price Subcontract to the selected Offeror. The selected proposal(s) may be fully funded or incrementally funded, depending on the merit of the proposals. Palladium reserves the right to award one, multiple, or no Subcontracts.

## Anticipated Contract Period of Performance

February 2024 – September 2024

## **Place of Performance**

The activities to be performed under this contract will take place in Indonesia (all provinces).

## **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 US Government Unique Entity Identification (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. 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 Approach (max 5 pages) containing:
  1. Outline of the approach, including:
    - i. Crowdfunding Strategy: Explain the proposed approach for the marketing campaign and estimated results.
    - ii. Management Strategy: Describe a team staffing plan that responds to project needs with a focus on roles, responsibilities, and reporting structure. Emphasize strategies to increase efficiency, maximize impact and ensure scalability and sustainability. Comment on your vision for the relationship with CATALYZE (e.g., support and information needed from CATALYZE, financial and nonfinancial information shared, etc.).
  2. Implementation timeline and illustrative workplan
- (d) Past Experience Information/Capability Statement (max 2 pages)
  - a. Briefly describe the offeror's (as well as any partners') previous work, awards (including ISO awards), experience, and demonstrated success in achieving activity goals. Demonstrate expertise in:
    - i. Fundraising, particularly crowdfunding
    - ii. Designing and implementing a successful online marketing campaign
    - iii. Reporting findings to clients
    - iv. Describe previous relevant projects including the number of donors and amount of funding raised.
- (e) References (max 1 page)
  - a. Provide the name and contact details for three referees familiar with your crowdfunding and marketing work.

## **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 consists of:

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 United States Dollars (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
- If the Technical Proposal includes travel, Offeror should budget for Defense Base Act (DBA) insurance in accordance with FAR 52.228-3, as applicable.

**Evaluation and Award Process**

Proposals will be evaluated using a best value trade-off methodology.

- (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:

	<b>Requirement</b>	<b>Supporting Documentation</b>
<b>(a)</b>	Must be a registered legal entity in Indonesia for a minimum of one year	Copy of certificate or articles and memorandum of associate
<b>(b)</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

- (2) If these minimum criteria are met, the Offeror's Technical Proposal will be evaluated as follows:

<b>Evaluation Criteria</b>	<b>Documents Evaluated</b>	<b>Points</b>
Soundness and reasonableness of technical approach	Technical approach, proposed personnel's CVs	40
Offeror's demonstrated capability to carry out proposed approach	Past experience information/ Capability Statement	30
The Offeror's implementation timeline and illustrative workplan are realistic, reasonable, and well thought out.	Technical approach	30
<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: Nonprofit entities – Cost Principles in 2 CFR 200 Subpart E or F 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 (will be required only for the successful Offeror, where applicable – included for awareness only)

Attachment 2- FFATA Form (will be required only for the 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>



## **Annex A: Scope of Work – Crowdfunding Service Provider for CATALYZE Indonesia**

### **Background**

In Indonesia, CATALYZE is supporting the national health insurance agency (*Badan Penyelenggara Jaminan Sosial-Kesehatan* - BPJS-Kes) to increase enrollment and re-enrollment of individuals, particularly informal sector workers, in the national health insurance scheme (*Jaminan Kesehatan Nasional* - JKN), to improve the health, wellbeing, and economic empowerment of vulnerable populations in Indonesia. JKN is a major social protection scheme that serves as key avenue to universal health care and ensuring health and well-being of the population. USAID has a record of funding programs that support the Government of Indonesia in increasing access to and improving the affordability of social protection schemes.

The goal of this CATALYZE activity is to align blended finance mechanisms to promote the social protection of vulnerable populations, particularly female workers and their families, in Indonesia through paid enrolment of the informal sector workforce in JKN.

The CATALYZE activity in Indonesia is structured around three technical components (Awareness, Process, and Resources). CATALYZE will facilitate improvements in awareness of JKN and the options available to help pay for premiums through targeted online/offline marketing campaign. CATALYZE will also increase the number of approaches through which the informal sector workforce, especially women, can enroll in JKN as well as the premium payment plan program. Lastly, the core purpose of the overall CATALYZE project is the identification and blending of public and private financing mechanisms to sustainably advance development outcomes. In keeping with this vision, CATALYZE will identify existing and innovative financing instruments that can be combined to reduce the informal sector's ability-to-pay gap, especially for the arrears the sector members must cover to become active JKN members again. This will involve partnering with crowdfunding organizations, local government/village funds, local businesses, money transfer businesses, financial institutions, and business support social enterprises.

Combined, these actions will help overcome immediate financial barriers and support Indonesia's efforts to achieve universal health coverage (UHC) while putting individuals on a path towards consistently paying their premiums in Indonesia.

For these reasons, CATALYZE is seeking one or more Crowdfunding Service Provider(s) to create an online marketing campaign and mobilize resources from domestic individuals and institutions for JKN premium payments.

CATALYZE intends to award a Fixed Price Subcontract with an anticipated period of performance of February 2024 to September 2024 to the selected Crowdfunding Service Provider(s).

### **Responsibilities of the CATALYZE Indonesia Crowdfunding Service Provider**

CATALYZE expects the Crowdfunding Service Provider ("Subcontractor") to:

- Conceptualize 2-3 approaches for a marketing/communication campaign to mobilize financial resources from individual and institutional donors via crowdfunding for JKN premium payment of at least 370 individuals per year
- Develop and execute the selected online marketing campaign to crowdfund for JKN premium payment
- Gather donations and disburse to CATALYZE-designated recipient organization
- Keep track of data on the donors
- Appropriately account for the funds received from CATALYZE
- Appropriately account for donated funds
- Provide insights into how many potential donors were reached, donor transactions (number of donors and average donation amounts, with possible disaggregation such as age, gender, and geographic location of donors), the amount of money received, the amount that was transferred to BPJS-Kes for JKN premium payments, and other relevant marketing campaign implementation updates.

CATALYZE seeks the following solutions:



- The technical support provided should encompass IT, marketing, legal, financial, and tax-related reviews to ensure campaigns are prepared for launch on selected platforms;
- The Subcontractor should support CATALYZE's efforts to adopt innovative solutions to health insurance premium payment for vulnerable populations;
- A crowdfunding and marketing strategy including scalable and sustainable interventions that contribute to Indonesia's efforts to achieve UHC.

**Illustrative Deliverables and Timeline** (details subject to change)

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.

#	Report and Deliverable	Deadline	Payment Amount
1	Workplan and timeline	2 weeks from award date	15%
2	Draft campaign materials	1 month from award date	15%
3	Number of campaigns completed	6 weeks after award date + ongoing	\$\$ per campaign, ceiling of 25% of contract value
4	Amount of funds raised	6 weeks after award date + ongoing	\$\$ per \$1,000 raised, ceiling of 25% of contract value
5	Monthly Reports	6 weeks after award date + ongoing	2% each
6	Final Report	End of period of performance	18%