

Amendment to Request for Proposal

Amendment number: 1

Reference Request for Proposal Number: RFP-CATALYZE-ASIA-2024-0038

Amendment effective date: April 15, 2024

Description of Amendment:

1. This amendment serves to modify the Closing Date and Time on Page 1 of the RFIP from April 5, 2024 to April 24, 2024.

Request for Proposal (RFP)

Subject RFP #:	RFP-CATALYZE-ASIA-2024-0038_Research Advisor
RFP Issue Date:	March 22, 2024
Terms of Reference / Specifications:	Research Advisor
Project	CATALYZE Innovative Blended Finance
The Company	Palladium International, LLC
Country of Performance	Indonesia
Closing Date and Time	April 24, 2024; 5:00pm EST
Questions Deadline	<input checked="" 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 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 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 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

Palladium is implementing on behalf of the United States Agency for International Development (USAID) the USAID CATALYZE Innovative Blended Finance Project (USAID CATALYZE), an 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, USAID CATALYZE is supporting the national health insurance agency (Badan Penyelenggara Jaminan Sosial-Kesehatan, BPJS-Kesehatan) 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, USAID CATALYZE aims to support the Government of 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, USAID 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 enroll and pay for JKN; and
- Work with private sector partners to mobilize resources for premium payments through crowdfunding, loans, and support for income generation.

Purpose

USAID CATALYZE is seeking a Research Advisor to support the baseline assessment for the program, which is expected to set the foundation for CATALYZE to answer the program's learning questions. Working closely with the Monitoring, Evaluation, and Learning (MEL) Officer, this position will provide technical assistance in developing the necessary research tools, assisting in monitoring the data collection, and summarizing the findings of the baseline assessment.

A complete scope of work is attached as Annex A.

Type of Contract

Palladium intends to issue a Firm Fixed Price Independent Consulting Agreement to the selected offeror.

Anticipated Contract Period of Performance

April – September 2024

Place of Performance

The activities to be performed under this contract will take place in: Indonesia

Key Deliverables and Timeline

No.	Description	Date	Percentage
1	Research methodology, sampling strategy, and data collection instruments for the baseline assessment to respond to project learning questions and rapid gender assessment.	One month from award	40%

2	Draft baseline report based on findings summaries produced by research firm.	Three months from award	40%
3	Comments/feedback to documents/PowerPoint presentations for internal and external meetings	One month prior to contract end	20%

Instructions to Offerors

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 contact info and expression of interest (max 1 page)
- (b) Resumé (no page limit)
- (c) Contact details for three referees (max 1 page)

2. Cost Proposal

Offerors should indicate their consulting daily rate in the submission email.

Submission of Offers

Electronic proposals must be submitted by sending one email to the provided address with all required materials with the RFP number in the subject lines. 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.

Evaluation and Award Process

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

(1) Offeror’s will be evaluated based on the following criteria:

Key competencies required:

- Minimum of 10 years of relevant work experience in research, data analytics, monitoring or evaluation;
- Demonstrated experience managing quantitative and qualitative data collection systems, conducting data analysis, and moving routine analytics and research findings to program actions;
- Experience in implementing the Collaborating, Learning, and Adapting (CLA) strategy, effective knowledge management systems, and disseminating findings to various audiences;
- Deep knowledge of BPJS-Kesehatan and JKN;
- Experience working with a diverse range of stakeholders including government institutions, private sector entities, civil society, donor agencies, and bilateral or multilateral agencies;
- Fluency in spoken and written Bahasa;
- High proficiency in spoken and written English;
- Ability to coordinate and effectively conduct meetings with key stakeholders as a representative of the USAID CATALYZE program;
- Self-motivated, proactive, and driven individual who can work both independently and autonomously, but also as part of a team;
- Ability to problem solve and think analytically; and
- Attention to detail and ability to perform multiple tasks and balance competing priorities effectively and efficiently often within a required timeframe.

Preferred Qualifications:

- Master’s degree in a relevant field, PhD preferred.

(2) 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.

Attachments

Please review the additional documentation and proposed contracts terms and conditions which should be given consideration when preparing your proposal. By submitting your bid you will certify that that you are 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

Program Overview

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

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- Work with private sector partners to mobilize resources for premium payments through crowdfunding, loans, and support for income generation.

Position location: Indonesia. Remote applicants are welcome to apply.

Primary duties and responsibilities

USAID CATALYZE is seeking a Research Advisor to support the baseline assessment for the program, which is expected to set the foundation for CATALYZE to answer the program's learning questions. Working closely with the Monitoring, Evaluation, and Learning (MEL) Officer, this position will provide technical assistance in developing the necessary research tools, assisting in monitoring the data collection, and summarizing the findings of the baseline assessment.

Specifically, the Research Advisor will:

- Lead the drafting of the program's baseline data collection methodology, sampling strategy, and data collection instruments to respond to project learning questions and rapid gender assessment, with support from the MEL Officer;
- Provide strategic support to MEL Officer in ensuring the contracted research firm executes the baseline data collection appropriately by providing orientation to the research tools and methodology and providing feedback on contractor deliverables;
- Draft the baseline report based on research firm's summary of data collection findings as part of CATALYZE's learning materials following outline developed by CATALYZE;
- Based on Team Lead and MEL Officer requests, participate in meetings with USAID and other key stakeholders such as BPJS Kesehatan to respond to any technical questions or share findings and learnings from the baseline assessment;
- Liaise with the USAID CATALYZE team, particularly the Program Officer, MEL Officer, and Private Sector Partnerships Coordinator based in Jakarta as well as the Senior Associate based in Washington, DC; and team meetings and meetings with partners as needed.

Deliverables

1. Research methodology, sampling strategy, and data collection instruments for the baseline assessment to respond to project learning questions and rapid gender assessment.
2. Draft baseline report based on findings summaries produced by research firm.
3. Comments/feedback to documents/PowerPoint presentations for internal and external meetings