REQUEST FOR PROPOSALS (RFP) NOTICE

The Clinton Health Access Initiative (CHAI) invites interested and capable agencies to submit proposals for the “**Final External Evaluation of the Best Practices Grant**”.

**SUMMARY OF TIMELINES**

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| --- | --- |
| *Bid Reference* | **RFP/CHAI/SRH/0124** |
| *Release of Request for Proposals* | **24 Sep 2024** |
| *Deadline to confirm interest in and pose questions for information session call* | **7 Oct 2024 (11:59pm GMT)** |
| *Information session call* | **10 Oct 2024 (time to be announced)** |
| *Deadline for submitting questions by email* | **11 Oct 2024 (11:59pm GMT)** |
| *Proposals due/last date of submission of proposal* | **18 Oct 2024 (11:59pm GMT)** |

**OVERVIEW OF TIMELINES AND REQUIREMENTS**

**Submission**: The proposal must be submitted electronically to the following email address [srhprocurement@clintonhealthaccess.org](mailto:srhprocurement@clintonhealthaccess.org) at least by **18 October 2024 by 11:59pm GMT** with the subject ‘*Submission for Bid Ref: RFP/CHAI/SRH/0124’*. The technical proposal should be in Microsoft Word format and a project budget using the provided financial proposal template. Late/incomplete proposals will not be accepted in any circumstances. Proposals received after the due date or to any other email address will not be considered.

**Submission link**: Should your submission exceed 2Mb and cannot be sent by email, please send an email to request an upload link with the subject ‘*Requesting upload link for Bid Ref: RFP/CHAI/SRH/0124*’ to [srhprocurement@clintonhealthaccess.org](mailto:srhprocurement@clintonhealthaccess.org). Requests for links must be made in advance of the deadline – at least by **15 October 2024 by 11:59pm GMT.** Submission links other than links provided by CHAI will not be accessed.

**Information session**: An information session will be held on **11 October 2024** (time to be announced). If your agency intends to attend this information session, please contact us by **7 Oct 2024 (11:59pm GMT)** following email address [srhprocurement@clintonhealthaccess.org](mailto:srhprocurement@clintonhealthaccess.org) with the subject ‘*Confirming interest for* *Bid Ref: RFP/CHAI/SRH/0124’*. Meeting details for the information session will be shared with prospective bidders who have confirmed interest or submitted proposals by this deadline. Please note that failure to confirm interest does not preclude your ability to submit a proposal. When you confirm interest in the information session, you may also specify any questions that you have, and we will aim to answer them during the information session. Questions not submitted in advance may be deferred for a response following the session.

**Queries**: Whether attending the information session or not, any queries or clarifications on the RFP should be submitted via the email [srhprocurement@clintonhealthaccess.org](mailto:srhprocurement@clintonhealthaccess.org) by **11 October 2024 by 11:59pm GMT** with the subject line ‘*Queries for Bid Ref: RFP/CHAI/SRH/0124’*. Responses will be shared in a Q&A file here: <https://clintonhealth.box.com/s/2t1egttlafkg2inktis9k609mow2xiye>. Any queries or clarifications received after the deadline will not receive a response.

**TABLE OF CONTENTS**

[1 BACKGROUND 4](#_Toc177759573)

[1.1 Clinton Health Access Initiative (CHAI) and the United Kingdom Foreign, Commonwealth, and Development Office (FCDO) 4](#_Toc177759574)

[1.2 The Best Practices Grant 4](#_Toc177759575)

[1.3 Evaluation Aims 6](#_Toc177759576)

[1.4 Users and audience of evaluation 8](#_Toc177759577)

[2 METHODOLOGY 8](#_Toc177759578)

[2.1 Overview 8](#_Toc177759579)

[2.2 Data Sources 9](#_Toc177759580)

[2.3 Ethical and Safeguarding Standards 9](#_Toc177759581)

[2.4 Exclusivity and Data Confidentiality 10](#_Toc177759582)

[2.5 Evaluation Team 10](#_Toc177759583)

[2.6 Logistical Support and Duty of Care 10](#_Toc177759584)

[3 TIMELINE AND MILESTONES 11](#_Toc177759585)

[3.1 Deliverables 11](#_Toc177759586)

[3.2 Timeline 12](#_Toc177759587)

[3.3 Payment 13](#_Toc177759588)

[3.4 Management and Coordination 13](#_Toc177759589)

[4 GUIDELINES FOR PREPARING PROPOSALS 14](#_Toc177759590)

[Part 1: Cover Letter and Declaration 14](#_Toc177759591)

[Part 2: General and Technical Proposal 15](#_Toc177759592)

[Part 3: Financial Proposal 17](#_Toc177759593)

[5 SELECTION CRITERIA 17](#_Toc177759594)

[6 CONFLICT OF INTEREST DISCLOSURE 18](#_Toc177759595)

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| --- |
| **Disclaimer:**  The distribution of this document does not mean there is any commitment on the part of CHAI and FCDO to fund an applicant. CHAI and FCDO will not reimburse or otherwise bear any costs associated with this RFP development regardless of whether an organization is selected to implement the project. Please note that no fee is required in the submission of this application. CHAI and FCDO make no representation or warranty and shall incur no liability whatsoever under any law as to the accuracy, reliability or completeness of the information contained in the RFP. |

# BACKGROUND

## Clinton Health Access Initiative (CHAI) and the United Kingdom Foreign, Commonwealth, and Development Office (FCDO)

CHAI is a global health organization committed to our mission of saving lives and reducing the burden of disease in low-and middle-income countries. We work at the invitation of governments to support them and the private sector to create and sustain high-quality health systems. CHAI was founded in 2002 in response to the HIV/AIDS epidemic with the goal of dramatically reducing the price of life-saving drugs and increasing access to these medicines in the countries with the highest burden of the disease. Over the following two decades, CHAI has expanded its focus. Today, along with HIV, we work in conjunction with our partners to prevent and treat infectious diseases such as COVID-19, malaria, tuberculosis, and hepatitis. Our work has also expanded into cancer, diabetes, hypertension, sexual and reproductive health, and other non-communicable diseases, and we work to accelerate the rollout of lifesaving vaccines, reduce maternal and child mortality, combat chronic malnutrition, and increase access to assistive technology. With each new and innovative program, our strategy is grounded in maximizing sustainable impact at scale, ensuring that governments lead the solutions, that programs are designed to scale nationally, and learnings are shared globally.

Information about the FCDO can be found at [Foreign, Commonwealth & Development Office - GOV.UK (www.gov.uk).](https://www.gov.uk/government/organisations/foreign-commonwealth-development-office)

CHAI is funded by FCDO to implement the “Establishing Best Practices for Government-Led Product Introductions” grant(referred to as the Best Practices Grant (BPG) throughout this document) as part of FCDO’s Reproductive Health Supplies Programme. CHAI is the primary party commissioning this external evaluation and will do so in coordination with FCDO.

## The Best Practices Grant

The UK is making substantial investments through its Reproductive Health (RH) Supplies programme towards expanding access to RH commodities – including contraceptives, maternal health medicines and safe abortion supplies. One component of this investment has been focused on optimizing the way that reproductive health markets function.

The journey from the product manufacturer to end-user is fraught with challenges and risks. Low and uncertain demand for RH commodities due to social norms, fluctuations in financing and political priorities can deter suppliers from beginning long and costly registration processes, investing in research and development (R&D) and scaling up manufacturing capacity. As a result, RH commodity markets in low- and middle-income countries (LMICs) are often stuck in ‘market traps’ characterized by few quality-assured suppliers, high prices, low demand and lack of innovation. These market traps ultimately constrain access to essential medicines in low-income countries, worsening health outcomes and reducing the value for money derived from donor funding.

Since 2012, the global community has focused on shaping family planning (FP) markets to increase the range of affordable, high-quality contraceptive options available to women in low- and middle-income countries (LMICs). However, **until now, the approach has been product-specific**, with donors forming bespoke market shaping partnerships to support availability, such as for the contraceptive implant and DMPA-SC (the self-injectable contraceptive). Whilst these interventions have been highly effective at increasing access, this product-specific approach is inefficient and cumbersome. High financial risks and transaction costs associated with these kinds of partnerships can deter donors from tackling other commodity markets in parallel, constraining our ability to be flexible in response to emerging opportunities. This has resulted in an inefficient architecture that does not holistically meet the needs of country-owned programs that aim to ensure a full suite of RH product choices are made available to the women they serve.

At the country level, RH product introductions are managed on an ad hoc basis, and often struggle to align disparate donor investments to a national introduction plan that requires careful sequencing and planning. Different donors fund different partners to support distinct, but sometimes overlapping, aspects of the overall introduction process. This fragmentation of funding and responsibility can undermine country ownership and sustainability, result in poor sequencing of introduction activities, and lead to inefficiencies and wastage of resources.

In this context, the UK has funded the Best Practices Grant (BPG), to build best practices of country-led RH product introduction, leveraging the opportunity afforded by efforts to increase access to hormonal IUS and MA combipack. CHAI aimed to scale up hormonal IUS and/or MA combipack in several countries, while demonstrating how government ownership of RH product introductions can result in greater efficiency, effectiveness, and routinization of RH product introduction. The Best Practices Grant period is July 2020 to March 2025, and the total funding amount for this period was £40 million. Specific goals of the BPG include:

1. Provide technical assistance (TA) to governments at their request, for planning and coordination of hormonal IUS and/or combipack introduction and scale-up in at least 10 countries. Other RH products, including maternal and newborn health products, may be included on a case-by-case basis depending on government interest.
2. Establish a mechanism for global funding for in-country RH product introduction – starting with hormonal IUS and combipack - that supports efficient use of existing public and private domestic resources, proper sequencing of introduction activities, and rapid deployment of donor funds.
3. Provide deeper support to the governments of Kenya, Nigeria, Tanzania and Zambia to establish and strengthen the systems and processes required to support routine RH product introduction.
4. Document lessons learned and results from the above objectives and will share these with the broader community to grow the knowledge base on best practices for government-led product introduction.

Product specific work has focused on hormonal IUD in DRC, Kenya, Nigeria, Rwanda, Tanzania, Uganda, Zambia and Malawi as well as on combi-packs for safe medical abortion for women and girls in Cambodia, DRC, Uganda, Rwanda, and Zambia. In 2024, early work began with a focus on maternal and newborn health products, such as oxytocin, caffeine citrate, and tranexamic acid, in Ethiopia, Ghana, Kenya, Malawi, Nigeria, Rwanda, Uganda, Zambia.

The BPG aims to deliver value in the following dimensions:

* *Economy*: By ensuring that RH product introduction is government-led and well-coordinated, the BPG aims to generate significant cost savings throughout product introduction process and ensure sustainability. The Catalytic Opportunity Fund, which is a funding mechanism administered through the BPG, ensures that FCDO’s funding is targeted towards the most critical introduction activities, in line with national priorities and scale-up plans.
* *Efficiency*: At the country level, the BPG aims to mitigate challenges that disrupt RH commodity availability, including sub-optimal introduction planning and procurement practices. Ensuring that product introduction efforts and investments are streamlined and well-coordinated also helps to achieve greater efficiency.
* *Effectiveness*: Leveraging global coordination groups to actively monitor supply and demand for new and lesser-used RH products is expected to mitigate global supply shortages and ensure product availability. Ensuring that governments are in the lead of new RH product introduction will also improve the timeliness and cost-effectiveness of commodity delivery, amplifying this impact through overall increase in access.
* *Equity*: Finally, this grant is supporting increased RH commodity availability and an increased choice in the method of contraception which will have a significant impact on women’s health and wider social and economic benefits. Better utilization of resources is expected to tangibly increase the availability of RH products for women and girls in the world’s poorest countries and to enhance access to the most vulnerable populations within these settings.

The Best Practices Grant is a complementary investment to the UK’s anchor investment in the **UNFPA Supplies Partnership** - the world’s largest provider of RH commodities for LMICs. UNFPA Supplies Partnership aggregates demand for RH products at the global level and delivers supplies to 54 LMICs. In 2022 alone, contraceptives procured through the program reached an estimated 21 million women and girls and helped to avert an estimated 8 million unintended pregnancies, 2.2 million unsafe abortions and 170,000 maternal and child deaths. In addition to increasing availability and choice of RH commodities, the partnership is focused on strengthening supply chains and increasing government commitment to SRHR. More information on the partnership can be found [here.](https://www.unfpa.org/featured-publication/unfpa-supplies-partnership-annual-impact-report-2023)

The findings of this evaluation will help to guide and inform FCDO thinking on potential future investments in RH market shaping after the current program ends in March 2025.

## Evaluation Aims

The focus of this evaluation is to enhance learning and generate insights based on the experiences of the BPG. In particular, this evaluation will inform FCDO’s final Program Completion Review and help inform future investments on RH market shaping. It should address the following three objectives:

1. To evaluate the **effectiveness** of the BPG in enhancing the availability of the hormonal IUD, quality-assured medical abortion combipacks, and other reproductive health products; establishing government-owned introduction systems and processes across a range of RH products; and strengthening global architecture to support more efficient, government-led product introduction.
2. To understand existing **synergies between the UNFPA Supplies** program and the BPG and identify opportunities for the two programs to deepen collaboration and coordination in future work.
3. To assess the extent to which the program has had **impact** on contraceptive uptake or choice and map the pathway to impact [*Where feasible based on availability of secondary data*].

The evaluation should address the following questions:

| **Topic** | **Evaluation questions** |
| --- | --- |
| **Effectiveness** | * In which types of contexts has CHAI’s support to build routine systems and processes for routine product adoption and introduction been particularly effective? And why? * In which types of contexts has CHAI’s support to build routine systems and processes for routine product adoption and introduction been less effective? And why? * To what extent has CHAI’s technical assistance for introduction of reproductive health products been helpful in ensuring efficient, coordinated, and effective introduction of these products? * How has the Catalytic Opportunity Fund improved the effectiveness and efficiency of product introductions? How could the COF’s effectiveness be enhanced? * Which particular components or interventions of BPG have been more or less effective, and why? * What are the implications for the design and implementation of any future program that aims to support governments to steward their reproductive health markets?   To answer these questions, it may be necessary to develop some kind of typology that considers parameters such as policy environment; level of centralization / decentralization; relationships between government, INGOs and civil society in country; etc. |
| **Synergies with UNFPA Supplies** | * What, if any, have been the synergies between the UNFPA Supplies Program and the BPG? * Where synergies have taken place, to what extent have they contributed to better outcomes? And if so, how? * What opportunities exist to enhance these synergies? * What are the implications for the design and implementation of a future program? |
| **Impact** | * Is there evidence of change in the uptake and/or choice of reproductive health products to which the BPG has contributed? If so, how and why? If not, why not? * Which populations within program-supported countries have benefitted? |

The [OECD DAC criteria](https://web-archive.oecd.org/temp/2024-05-13/81829-daccriteriaforevaluatingdevelopmentassistance.htm) should be applied thoughtfully to support high quality, useful evaluation. We expect the majority of time and resources to be devoted to the following criteria: (i) coherence, (ii) effectiveness, (iii) efficiency and (iv) sustainability.

## Users and audience of evaluation

The main users of the evaluation will be FCDO and CHAI. It is expected that the findings of the evaluation will deliver insights on CHAI’s achievement and challenges encountered, and on the innovative model for supporting market stewardship. It is expected that evaluation findings will influence programming decisions by FCDO and CHAI, and specifically inform the development of a follow-on program to begin in April 2025.

The results of this evaluation will also be shared more broadly with a target audience of stakeholders that have an interest in the work of the BPG, with the goal of informing the programming and investments of other donors, governments, and practitioners in the SRHR field.

# METHODOLOGY

## Overview

The specific design is to be proposed by the applicant to this RFP. Given the timescale and purpose of the evaluation we expect it to have a strong focus on qualitative methods alongside secondary analysis with existing data sets.

Minimum requirements for the methodology include:

* Purposive sampling strategy to maximize opportunities for learning (i.e. by focusing on areas of both strong and weak performance).
* Alignment of the methodology with the evaluation aims
* At least three country case studies, to include Kenya, Zambia, and Rwanda, and adaptations to the methodology that reflect an understanding of the local political, economic, and social contexts in these settings
* Clarity in approach in relation to design, sampling, and data collection, analysis, and triangulation and appreciation for trade-offs and limitations presented by certain methodological decisions

The proposal should detail the proposed evaluation design and methodology, the potential risks and challenges for the evaluation and how these will be managed. Applicants are invited to propose approaches and methods which they believe will most effectively and efficiently answer the different priority questions and meet the purpose of the study within the time available. The successful applicant will then refine this proposal within the inception phase (first month of the contract), in consultation with CHAI, FCDO, and other relevant stakeholders.

## Data Sources

The methods and assessment frameworks employed for this evaluation should facilitate the collection and analysis of data, be relevant to the evaluation aims outlined in Section 1.3 above and make optimal use of existing data.

Sources that will be used in the evaluation would, at a minimum, include:

* *Program document review:* Review of key documents including the following program and project documents, which will be prepared by CHAI/FCDO and provided to the evaluator:
  + - * Quarterly and annual reports for the BPG
      * Original proposal document from CHAI to FCDO
      * Logframe
      * FCDO Annual Reviews
      * CHAI Assessments of the Catalytic Opportunity Fund
* *Analysis of secondary data:* Analysis and synthesis of data available through all relevant CHAI country teams, which may include the following (availability by country will vary):
  + - * Service delivery data for public sector site from the Health Management Information System (HMIS)
      * Stock data from the Logistics Management Information System (LMIS)
      * Data on health worker training on relevant products by CHAI and other partners
      * Minutes or other materials from national production introduction committees
* *Interviews with key partners:* Interviews or other engagement with key stakeholders such as national, district-level and local health policy makers and government program or logistics managers in Kenya, Zambia, and Rwanda, other implementers and practitioners in relevant areas, and key staff members from CHAI, UNFPA, and FCDO.

## Ethical and Safeguarding Standards

The agency is not required to obtain IRB approval for this work as it is a program evaluation that is not designed to be widely generalizable or formally disseminated in publications. Although this is a program evaluation and not a research study subject to Institutional Review Board (IRB) approval, care should be taken to protect the privacy and rights of stakeholders consulted. All applicants should demonstrate how they will implement ethical standards for conducting an evaluation including “do no harm” as set out in [FCDO’s Ethical Guidance for Research, Evaluation and Monitoring Activities](https://www.gov.uk/government/publications/dfid-ethical-guidance-for-research-evaluation-and-monitoring-activities).

The tender should include a high-level overview of the types of personal data, key data protection risks and any proposals to deal with those risks. While we are not expecting extensive primary data collection in the field, all tenders should provide details on any digital data tools to be used including software to be used for any data collection or analysis.

All tenders must set out how they have adequate human and technical resources to ensure the protection of the rights of data subjects and ensure compliance with relevant local and international standards around data protection, such as the UK’s General Data Protection Regulation (GDPR).

## Exclusivity and Data Confidentiality

Agencies bidding for this RFP must agree in principle to abide by the following clauses:

1. No other ongoing or future research projects/contracts with other parties/agencies in which CHAI is not involved, be mixed with the data collection efforts under the current RFP. The agency needs to provide a written declaration that they will be making country visits and engaging stakeholders for the purpose of this evaluation only.
2. Data collected from this effort and under this project is solely the intellectual property of FCDO/CHAI. The data and findings, shall under no circumstance, be shared with a third party, be analyzed, reported, or published in any form without the prior written approval of FCDO/CHAI. The selected partner as part of the proposal will be expected to sign a non-disclosure agreement to safeguard the confidentiality of FCDO/CHAI’s business information and data.
3. FCDO and CHAI will have unlimited access to the material produced by the supplier, with the exception of personal information within datasets or other measures to protect the privacy of individuals (this will be agreed as part of data management plans).

## Evaluation Team

The evaluation team will comprise experts with experience across the key elements of the BPG. The competencies and experience that the Evaluation Team will need to deliver the work are:

* + Extensive expertise with market analysis, supply chain management;
  + Extensive knowledge of evaluation methods and techniques, including OECD DAC evaluation principles;
  + Strong qualitative and quantitative research and analysis skills;
  + Strong understanding of health sector governance and public sector management in LMICs;
  + Experience working on sexual and reproductive health and rights (SRHR) programs
  + Inclusion of national/local consultants from Kenya, Zambia, and/or Rwanda with a deep understanding and expertise of commodity markets; and
  + Strong analysis, report writing and communication skills.

## Logistical Support and Duty of Care

The consultant(s) must organize their own travel (to and in country as relevant), accommodation and other related expenses. This should be incorporated into the budget as part of the application. Recommendations on travel and accommodation options can be provided. Consultants will be expected to secure their own travel and medical insurance. CHAI will also make connections to government and other stakeholders for in-person or virtual meetings.

The consultant(s) is responsible for the safety and well-being of their Personnel and Third Parties affected by their activities under this contract, including appropriate security arrangements. They will also be responsible for the provision of suitable security arrangements for their domestic and business property and are expected to carry appropriate insurance.

Applicants must develop their proposal on the basis of being fully responsible for Duty of Care and must confirm in their Tender that:

* + They fully accept responsibility for Security and Duty of Care for individuals employed by the agency to work on this project.
  + They understand the potential risks and have the knowledge and experience to develop an effective risk plan.
  + They have the capability to manage their Duty of Care responsibilities throughout the life of the contract.

Acceptance of responsibility must be supported with evidence of capability and CHAI reserves the right to clarify any aspect of this evidence. In providing evidence applicants should consider the following questions:

* 1. Have you completed an initial assessment of potential risks that demonstrates your knowledge and understanding, and are you satisfied that you understand the risk management implications (not solely relying on information provided by CHAI)?
  2. Have you prepared an outline plan that you consider appropriate to manage these risks at this stage (or will you do so if you are awarded the contract) and are you confident/comfortable that you can implement this effectively?
  3. Have you ensured or will you ensure that your staff are appropriately trained (including specialist training where required) before they are deployed, and will you ensure that on-going training is provided where necessary?
  4. Have you an appropriate mechanism in place to monitor risk on a live / on-going basis (or will you put one in place if you are awarded the contract)?
  5. Have you ensured or will you ensure that your staff are provided with and have access to suitable equipment, and will you ensure that this is reviewed and provided on an on-going basis?
  6. Do you have appropriate systems in place to manage an emergency / incident if one arises?

# TIMELINE AND MILESTONES

## Deliverables

The evaluation team will produce the following deliverables and should also develop a dissemination strategy which includes a set of learning events.

1. **Routine Progress Reporting:** CHAI and FCDO request brief written progress updates fortnightly and progress reporting calls fortnightly during the inception phase and then monthly, with ad hoc meetings as and when required
2. **Inception Report**: The inception report should include:
   * The full methodology and workplan for the evaluation
   * Assessment framework
   * Draft tools for primary data collection (e.g. interview guides)
   * A draft Theory of Change for the BPG
   * Identified sources of data
   * Risk management strategy
   * A communications / dissemination plan for the evaluation
   * List of key informants to be included in consultations (based on guidance from CHAI and FCDO)
   * Proposed table of content/structure for the final evaluation report
3. **Draft Evaluation Report**: Detailing the evaluation findings, conclusions, and recommendations. The report should include the following sections:
   * Cover page
   * Table of Contents
   * Executive Summary (no more than 3 pages)
   * Main report (no more than 35 pages)
     + Purpose of evaluation
     + Evaluation approach and methodology
     + Limitations of evaluation
     + Response to evaluation aim with supporting evidence
     + General findings, key messages and potential implications and recommendations
   * Annexes – additional supporting evidence as relevant
4. **Summary Presentation Slides and Meeting:** A slide deck summarizing the evaluation should be prepared and presented to CHAI and FCDO during a one-hour call.
5. **Final Evaluation Report**: Incorporating feedback from stakeholders and presenting finalized conclusions and recommendations.
6. **Results Dissemination Session(s):** One or more sessions may be held virtually or in person with external stakeholders that have an interest in this program. A version of the summary slides and evaluation report should be made available to these stakeholders. A detailed dissemination plan should be outlined in the proposal.
7. **Informal Learning Note** for CHAI and/or FCDO. [Optional]

## Timeline

The evaluator will be responsible for developing an expanded timeline for completing all activities under the assignment. The table below provides tentative timelines for the study. Please use the information in this table to develop a more detailed work plan.

The period of performance for this work is not more than 4 months with effect from the time the contract is signed.

| **Activity / Output** | **Deadline** |
| --- | --- |
| Evaluators selected and contract signed | Early to mid-December 2024 |
| CHAI and FCDO to provide relevant program documentation and secondary data | Early to mid-December 2024  (At time of contract signing) |
| Inception Report submitted to CHAI and FCDO | Early to mid-January 2025  (Within 4 weeks of contract starting) |
| CHAI and FCDO provide feedback on Inception Report | 2 weeks after submission of Inception Report |
| Data collection and analysis | January – February 2025 |
| Draft Final Report submitted to CHAI and FCDO for comments | By 24 March 2025 |
| Summary Presentation to CHAI and FCDO to discuss draft findings, and further dissemination activities/outputs as proposed in the communications / dissemination plan | By 27 March 2025 |
| CHAI and FCDO provide feedback on Draft Final Report | By 31 March 2025 |
| Final Report submitted, taking into account comments on the Draft Final Report | By 14 April 2025 |
| Results Dissemination Session for external stakeholders | By 30 April 2025 |

## Payment

The total budget available for the evaluation is up to $265,000, which is meant to cover all costs related to relevant taxes, personnel, travel, data collection, analysis, and reporting. Agencies should provide a detailed budget using the financial proposal template provided in Part 4 of this RFP.

Payment will be provided upon completion of key deliverables. The draft payment schedule is as follows:

* + 10% upon signing the contract to cover up-front costs
  + Additional 30% upon satisfactory completion of Inception Report
  + Additional 30% upon satisfactory completion of the Draft Final Report
  + Additional 30% upon satisfactory completion of the Final Evaluation Report and Results Dissemination Session

CHAI expects all applicants to abide by local tax regulations for the country in which they are based, and we will include relevant tax language in the contract.

Payment depends directly on submission and CHAI’s acceptance of the deliverables. Payment is linked to deliverables only and is not tied to the schedule described above.

## Management and Coordination

The evaluation will be managed by CHAI’s Analytics and Implementation Research (AIR) team, with support from FCDO’s SRHR team. Regular communication and coordination will be maintained to ensure alignment and timely progress of the evaluation activities.

Whilst the evaluation will be commissioned and managed by CHAI (the implementing partner), evaluators should be considered independent of the donor (FCDO) and implementing partner (CHAI) for the purposes of this evaluation.

# GUIDELINES FOR PREPARING PROPOSALS

* Language: Proposals must be submitted in English.
* Structure: Proposals must be set out in three main parts:

Part 1: Cover Letter and Declaration

Part 2: General and Technical Proposal

Part 3: Financial Proposal

## Part 1: Cover Letter and Declaration

Proposals must be accompanied by a covering letter on company-headed paper showing the full registered and trading name(s), trading and registered office address and business number of the agency. The letter must be signed by a person of suitable authority to commit the agency to a binding contract. It must quote the RFP title and include the following declarations:

1. We have examined the information provided in your Request for Proposals (RFP) and offer to undertake the work described in accordance with requirements as set out in the RFP. This proposal is valid for acceptance for 120 days, and we confirm that this proposal will remain binding upon us and may be accepted by you at any time before this expiry date.
2. We accept that any contract that may result will comprise the contract documents issued with the RFP and be based upon the documents submitted as part of our proposal.
3. Our proposal (technical and financial) has been arrived at independently and without consultation, communication, agreement or understanding (for the purpose of restricting competition) with any other Respondent to or recipient of this RFP from CHAI.
4. All statements and responses to this RFP are true and accurate.
5. We understand the obligations regarding disclosure as described in the RFP guidelines and have included any necessary declarations.
6. We confirm that all personnel named in the proposal will be available to undertake the services.
7. We agree to bear all costs incurred by us in connection with the preparation and submission of this proposal and to bear any further pre-contract costs.
8. We fully accept responsibility for Security and Duty of Care for Personnel, and we understand the potential risks and have the knowledge and experience to develop an effective risk plan. We have the capability to manage their Duty of Care responsibilities throughout the life of the contract.
9. I *[name of signatory]* confirm that I have the authority of [*insert name of company*] to submit this proposal and to clarify any details on its behalf.

## Part 2: General and Technical Proposal

The General and Technical section should be structured as follows:

***Section 1: Credentials of the Applicant / Firm*** (not more than 3 pages)

* Describe the organization, its core competencies, and organizational structure (e.g. high-level organizational chart)
* Submit the following business registration and operation criteria:
* *Company Information*: company name, company profile, year of establishment, verifiable business addresses (Head Office, and other locations), active telephone numbers, active email addresses in the name of the company and organization’s administrative structure, number of employees, statement of mission, vision, and mandate.
* *Ownership and Management*: Name of individuals in leadership positions, management structure, contact person/phone number for inquiries.
* *Financial Information*: Audited financial statements within and/or for the past 3 years.
* *Bank Information*: Evidence of bank account in the name of the company/business entity, Tax Identification Number (TIN) with evidence of tax remittance (tax clearance certificate) for the last three years.

***Section 2: Technical Response*** (not more than 12 pages)

* ***Approach overview:*** A concise description of the team composition, timeline, and operational plan to complete the deliverable. (This should describe the activities to be undertaken, the deliverables/outputs and the milestone and completion dates). The dependency of any activities and associated results on earlier results needs to be clearly indicated. *NOTE: The agency is not required to obtain IRB approval for this work as it is a program evaluation that is not designed to be widely generalizable or formally disseminated in publications.*
* ***Preparation****:* Describe the preparation activities the applicant will undertake. Include the recruitment of quality staff, development of data collection tools, and any other management tools.
* ***Understanding of local context****:* Describe any contextual considerations that may affect the secondary data analysis and/or the collection of primary data.
* ***Staffing and team composition****:* Describe the staff that will be working on this project, the recruitment method for hiring staff, number of staff needed to complete the project, roles and relevant experience, and whether they will be working on this project full-time or part-time.
* ***Data collection:***Describe the logistical plan for any primary data collection.
* ***Quality control measures:***Describe what quality control measures will be in place to ensure the quality of primary data collected and the analysis of any secondary data.
* ***Ethical considerations:*** Describe consent processes, measures to maintain participant confidentiality and any other measures to mitigate ethical risk.
* ***Dissemination plan:*** Describe how results will be shared to relevant stakeholder audiences, including CHAI, FCDO, other donors, governments, and implementers. Describe planned dissemination meetings and materials.
* ***Project timeline:***Describe the timing and duration of each activity.

***Section 3: Required Qualifications of the Applicant*** (not more than 4 pages)

* **Previous Experience**
  + - The organization should have prior experience of conducting quantitative and qualitative program evaluations
    - Describe assignments of a similar nature that were successfully completed by the firm in the last five years (maximum of 5) ***in the specific geographic area, and provide evidence to support claim (i.e. Kenya, Zambia and Rwanda)***
    - For each of the assignments please mention the title, duration, client, total cost, role of the firm and brief description of services rendered by the firm
* The organization must have a well-qualified team
* Any organizational experience of working with an international organization and/or government organization is desirable.
* Please share previous experiences with market analysis and supply chain management projects.
* Please share previous experiences working on sexual and reproductive health and rights (SRHR) programs.

***Section 4: Key Personnel***

* CVs of the proposed key personnel demonstrating suitability for this work (no more than 1 page per key personnel)

***Section 5: References***

* Contact information and description of relationship (nature of work, timing) for at least 3 references that CHAI may contact. These should be former or current clients that can provide insights into the quality and relevance of the work done by the applicant.

## Part 3: Financial Proposal

The financial proposal must contain the expected budget for accomplishing the complete work with detailed breakdown. All amounts quoted must be in US Dollars. The applicant should provide a detailed budget providing justifications and calculations for all the parameters. A detailed budget should be provided based on the format in the Excel template provided. Budgets should be inclusive of all taxes, insurance, and standard business overheads.

A financial proposal template is provided via this [link](https://clintonhealth.box.com/s/lervtta92djdru5b30oalasbbwgjvqvi). Download the Excel sheet, complete, and include it in your application. The financial amount should not appear in any of the submitted documents other than in the financial proposal in order to comply with the blinding procedures in our bid evaluation process. If you are unable to access this [link](https://clintonhealth.box.com/s/lervtta92djdru5b30oalasbbwgjvqvi), please contact us at [srhprocurement@clintonhealthaccess.org](mailto:srhprocurement@clintonhealthaccess.org) by **11 October 2024 by 11:59pm GMT** with the subject line ‘*Financial template request for Bid Ref: RFP/CHAI/SRH/0124’* and we will email the document to you.

# SELECTION CRITERIA

Proposals will not be considered if they:

* Have a total budget over $265,000;
* Do not use the financial template provided or include financial details in any other part of the proposal aside from the financial template;
* Are received after the deadline;
* Are unwilling or unable to accept responsibility for Security and Duty of Care as outlined in section 2.6;
* Are missing any components of the proposal package (cover letter with declarations, general and technical proposal, or financial proposal); or
* Exceed the stated page limits.

The following criteria will be adopted to short list the proposals and identify suitable agencies for the survey. Out of the total scores, 60% weights to be assigned to technical and 40% to the financial proposal.

|  |  |
| --- | --- |
| **Assessment Category** | **Weights** |
| **Technical Proposal**   * Qualifications of the applicant, including previous experience on undertaking similar assignments and organizational infrastructure * Availability of adequate and skilled team members for carrying out the assignment (education and relevant work experience) * Operational approach to executing the data collection and analysis * Feasibility and appropriateness of work plan | 60% |
| **Financial Proposal**   * Takes into consideration all potential expenses (i.e. no obvious omissions) * Reasonable estimate for each of the component/activity * Reasonable estimate for agency administrative costs * Presents good value for money | 40% |
| **Total Weighted Score (Technical + Financial)** | **100%** |

# CONFLICT OF INTEREST DISCLOSURE

Suppliers bidding on CHAI business must disclose, to the procurement contact listed in the RFP, any actual or potential conflicts of interest. Conflicts of interest could be present if; there is a personal relationship with a CHAI staff member that constitutes a significant financial interest, board memberships, other employment, and ownership or rights in intellectual property that may conflict with the supplier’s obligations to CHAI. Suppliers and CHAI are protected when actual or perceived conflicts of interest are disclosed. When necessary, CHAI will create a management plan that provides mitigation of potential risks presented by the disclosed conflict of interest in line with existing CHAI policies.

***END of RFP***