

**REQUEST FOR PROPOSALS (RFP):
MONITORING AND EVALUATION SERVICES**

A. Introduction and Purpose

The Public Health Institute (PHI) is a global leader in public health, dedicated to promoting health equity, well-being, and quality of life for people around the world through innovative solutions and collaborative partnerships. As one of the largest public health institutes in the United States, PHI is well-known for our efforts to address the social determinants of health and having diversity, equity and inclusion as key pillars of our approaches to address emerging public health crises.

Leveraging our capacity as a data-driven, science-based, and committed community partner alongside our statewide footprint and strong relationships with philanthropy, state agencies and local health jurisdictions, PHI is launching a new program to reduce the spread of COVID-19 among the most impacted communities in California.

PHI is seeking proposals in response to this RFP from qualified organizations and/or consortia (including small businesses) to provide a full range of monitoring and evaluation services for our new COVID-19 program. Through our award to implement the California COVID-19 Public Health Capacity Building Collaborative Fund (The Fund), PHI has a need to hire support for monitoring and evaluation (M&E) experts to work with project leadership to design the project's M&E system and related tools as well as measure the performance of the project.

B. Scope of Work

The Fund was formed by a proactive group of philanthropic organizations to pool resources and support and enhance state and local health agency efforts to reduce the community spread of COVID-19 within highly susceptible communities across California. The Fund is currently composed of a total of 11 philanthropies with others expected to join.

PHI is working closely with the initial funders to cultivate other donors to raise additional funds. To date, the Fund has currently raised approximately \$20 million and the goal is to raise \$25-40M for a period of performance from September 1, 2020 through December 31, 2021.

The Fund will work closely in a targeted number of local health jurisdictions to support and enhance county health department responses to COVID-19 in their communities. PHI will issue grants to CBOs to provide a variety of services needed to reach and engage communities.. The Fund has three main project components: (1) strengthen workforce development strategies and offer economic growth opportunities in communities disproportionately impacted by COVID-19; (2) promote a culture of health on issues and topics related to COVID-19; and (3) support community resilience.

The Fund is currently in the initial stages of project start up and design. PHI is in the process of hiring our project team, identifying the targeted areas of intervention, and drafting the work plan for the period of performance. The time is ripe to identify essential M&E technical expertise in order to ensure project M&E systems are designed and developed correctly from the start with clear plans for assessing, collecting data, and analyzing input and impact.

PHI is looking for an external monitoring and evaluation partner that can work hand in glove with our project team and leadership to develop the necessary M&E systems, processes, and tools to measure project performance and results. We are interested in having the M&E partner develop and implement a performance monitoring, evaluation and learning plan for our project – which will both measure the project performance but also the long-term impact of our intervention and investment in the communities we will serve.

The purpose of this Request for Proposals (RFP) is to identify a qualified and experienced successful bidder to carry out the following work:

- Provide overall project M&E services including:
 - Draft and submit a project performance, monitoring, evaluation, and learning plan within 30 days of award
 - Design the project monitoring and evaluation system and tools. Provide training to necessary staff and CBO partners on the use of the tools
 - Establish qualitative and quantitative project baseline data
 - Finalize the project results framework
 - Develop and finalize the project logical framework
 - Finalize the project indicators, including data sources
 - Outline and develop the processes and systems required to ensure data quality and reliability
 - Provide technical assistance to CBOs receiving project funds to ensure their ability to properly report on M&E activities
 - Develop M&E systems for CBOs that are simple and straightforward, yet also set up to feed data into the overall project data sources and project M&E tools
 - Identify key areas of learning and develop recommendations – for example: learning for the collaboration of funders, local health departments, CBOs who receive funding, and people recruited and hired for COVID-19 response related positions
 - Collect the project data and ensure data is integrated into the M&E tool
 - Analyze project data and trends and work with project leadership to determine any changes in technical approach that may be needed to strengthen delivery systems for each component in months 3, 6, and 9, with a final report due at the end
 - Review reports from grant recipients for data and provide analysis to staff
 - Provide support for quarterly report writing and the final report
 - Conduct an overall impact evaluation of the intervention at the end of the period of performance
 - Provide staff dedicated to the project, including a coordinator who will serve as a primary point of contact with PHI

In cases where the offeror does not directly provide a service outlined in the list above, offeror must indicate how they plan to offer those services to PHI.

C. Eligibility

Minimum Requirements and Qualifications for Participation in the RFP Process

PHI will accept and evaluate proposals only from bidders which meet all of the following criteria and requirements:

1. Previous experience working on at least three projects funded by philanthropy with a focus on public health and at-risk populations;
2. Previous experience providing M&E expertise to a project in the startup phase;
3. Familiarity and understanding of the COVID-19 issues facing California, especially as it relates to high-risk populations and contact tracing;
4. Previous related experience working with community-based organizations on M&E;
5. Proven experience developing M&E systems, tools, and processes, including an overall project performance monitoring, evaluation and learning plan; project results framework, logical framework; developing / finalizing project indicators, data sources, and data quality assurance processes, collecting baseline data and project data, and conducting a final project impact analysis; and
6. Proven experience supporting knowledge dissemination and translation of project learnings to other stakeholders

D. Submission Requirements

The bidder's proposal must provide a detailed response and supporting documentation, where requested, to each of the following areas:

A. Letter of Transmittal

- Provide a summary of your organization or consortium's qualifications and experience
- Provide a summary of your overall approach and team
- Shall not exceed one page in length

B. Cover page

- Please include the name of your organization(s) if there is a consortium or collaboration, address, and lead contact information
- Please include the name, title, and contact information for an authorizing official

C. Table of Contents

D. Company Information and Past Experience

- Provide a summary of your organization/consortium and outline your organizational capacity to conduct this work
- Include a description of your organization/consortium's experience and expertise providing related M&E services to a philanthropically funded project related to public health. Include a summary of what differentiates your firm from your competitors for this work.

- Describe the composition of your management team, headquarters, and board (if applicable). Provide any specifics on the diversity of your team as well as your organization/consortium's commitment to DEI values and any recent DEI related milestones
- Describe your experience working in California, if applicable, highlight and describe any direct experience working with local health jurisdictions or government agencies in the state.
- Provide a description of any relevant or recent M&E work related to COVID-19.
- Indicate the primary physical location from which you will be providing your services.
- Describe your relevant experience(s) engaging CBOs in the area of M&E.
- Provide a description of the techniques, approaches, strategies, and methods your firm uses, including any unique qualifications or capabilities with regards to the services outlined in Section B above.

E. Services Description

- Describe how your organization/consortium would manage this project, describe your staffing plan, including any appropriate combination of long-term or short-term FTE. Include a 1 page organizational chart. For each position listed, provide name, position title, and estimated FTE. Provide a description of key staff proposed to be assigned to the project. Submit resumes (2 pages maximum) for each proposed staff member.
- Describe if any outside expertise/consultants will be needed to carry out this work.
- Provide a summary or sample timeline/Gantt chart of how your firm would approach the M&E services for this project. Outline each activity and provide an estimated start/completion date assuming an initial project award of November 1, 2020 with a period of performance through February 27, 2022.
- Describe or outline the plan for the baseline evaluation or how your organization/consortium plans to collect the baseline data needed for this project.
- Provide a preliminary description of the risks or challenges associated with this work and any mitigation measure your organization/consortium plans to take to minimize those risks.

F. Financial Capacity

- Provide a copy of your most recent audited financial statements as an annex to your proposal. Were there any findings? If so, please explain.
- If your organization has a Negotiated Indirect Cost Rate Agreement (NICRA) with the federal government, please provide a copy.
- If the above documents are not available, please describe the average annual revenue for the past 5 years, including main funders, and types of awards received.

G. Cost/Price Proposal

- Bidders are requested to propose the best and most cost-effective solution to meet PHI's requirements, while ensuring a high level of service.
- Provide a detailed cost breakdown of the level of effort required for the services and any associated other direct costs and indirect costs using PHI's provided template in Annex A.
- Provide a budget narrative (3 page maximum) to describe the costs outlined in the proposal.

H. Credentials

- Provide a signed statement certifying bidder fully meets all minimum qualifications outlined in Section C-Eligibility.
- Identify any Diversity, Equity, and Inclusion (DEI) certifications (if applicable)

I. References and Past Performance

- Provide references with contact information from a minimum of three clients who have recently or currently use bidder's services/technical expertise.
- Bidders may submit three written client testimonials not to exceed 1 page each in lieu of contact information for current clients. Testimonials must address the following topics related to the bidder's:
 - i. Customer Service
 - ii. Responsiveness
 - iii. Capacity
 - iv. Value on fee for service
 - v. Experience working with public health programs

E. Proposal Format

In order for PHI to conduct the most efficient proposal evaluation, bidders are required to organize their proposals as noted below:

- A. Letter of Transmittal**
- B. Cover Page**
- C. Table of Contents**
- D. Company Information and Past Experience**
- E. Services Description**
- F. Financial Capacity**
- G. Cost/Price Proposal**
- H. Credentials**
- I. References**

Proposals must be organized according to the submission requirements and proposal format above. Proposals must address all of the requirements in Sections A-I listed above. Proposals must not exceed 15 pages, single spaced, Times New Roman Font, size 12, one inch margins. Cover page, table of contents, financial statements, NICRA letter, cost/price proposal, and resumes for staff are not included in the page limitation.

Proposals which fail to address each of the submission requirements above may be deemed non-responsive and will not be further considered. Note that responses to RFP requirements must be specifically answered within the context of the submitted proposal. PHI's review team will not refer to a designated website, brochure or other location for the requested information. Responses that use references to external materials as an answer will be considered non-responsive.

F. Submission of Proposals & Closing Time

Please submit proposals to: **Crystal Flexman**
Deputy Director of Development
Public Health Institute
Email: crystal.flexman@phi.org

Proposals are due by: **October 28, 2020**
12:00 PM – Pacific Standard Time (PT)

- Proposals must be submitted via email by the date and time specified above. Bidders are not permitted to submit hard copy proposals in addition to an electronic submission.
- PHI encourages inquiries concerning this RFP. All questions pertaining to this RFP must be made via email to PHI Deputy Director of Development, Crystal Flexman: crystal.flexman@phi.org PHI. Questions are due by 9:00 AM PT, **October 9, 2020**.
- Bidders should retain a copy of their application and accompanying enclosures for their records.

G. Proposal Timeline and Evaluation

1. Proposal Timeline

PHI intends to follow the below timeline for review and award of this solicitation:

- Questions Due: October 9, 2020 9:00 AM (PT)
- Deadline for Submittal: October 28, 2020 12:00 PM (PT)
- Review of Proposals: October 29-Nov 5, 2020
- Interviews or Additional Questions Conducted: Nov 6-13, 2020
- M&E Provider Selected: November 27, 2020

2. Proposal Evaluation

PHI is committed to a transparent process of award and selection of an M&E firm, organization or consortia with the intention to secure the best possible solution(s) for PHI's ongoing needs while ensuring an optimal financial and operational outcome and the best value to our funders.

An evaluation team will review, in detail, all proposals received to determine the best value. Following the initial review and screening of the written proposals, using the selection criteria described below, bidder(s) will be invited to participate in the final selection process, which may include participation in an oral interview and or submission of any additional written information as requested by PHI.

The following evaluation criteria will be utilized to evaluate the proposals by an internal evaluation team from PHI to determine the best value. A bidder can receive a maximum of 100pts:

- A) Company Information, Key Personnel, and Past Experience (20%)
- B) Services (30%)
- C) Financial Capacity (5%)
- D) Fees/Price (25%)
- E) Credentials (5%)
- F) References (10%)
- G) Diversity points (5%)

H. Solicitation Terms

1. Agreement

Subject to availability of funding, PHI intends to issue an exclusive cost reimbursable type agreement for a base period of 15 months to the successful bidder from this procurement process. The term of the agreement may change based on the award date. PHI reserves the right to issue one or more awards as a result of this RFP.

2. Nondisclosure Agreement

Consultant/Subcontractor/Supplier shall agree to sign nondisclosure agreement.

3. Discretion

PHI may, at its sole discretion and at any time in the process, choose not to issue any agreement as a result of this RFP. PHI may also, at its sole discretion, choose to issue as many or as few agreements, as deemed necessary to meet PHI's business needs, including deciding to not issue any agreements.

4. Offers/Quotations

Prices must be inclusive of all costs, including taxes and fees, in US Dollars. Quotes and prices should remain valid for ninety (90) calendar days from proposal submission.

5. Proposal Costs

There is no reimbursement for costs associated with preparing or submission of proposals in response to this RFP or costs associated with possible award negotiation.

6. Diversity, Equity, and Inclusion

PHI is dedicated to promoting diversity in its procurement of goods and services. Pursuant to PHI's commitment to diversity, PHI encourages vendors that are certified as any of the following businesses:

- WOSB: Women-Owned Small Business
- SDVO: Service-Disabled Veteran-Owned Business
- HUBZone: Historically Underutilized Business Zone
- SDB: Small Disadvantaged Business
- 8(a)BD: African American, Asian Pacific American, Hispanic American, Native American, Subcontinent Asian American

ANNEX A: BUDGET TEMPLATE
Table 1: Summary Table

Line Item	Project Period Total
A. PERSONNEL/SALARIES	
B. FRINGE BENEFITS	
C. TRAVEL	
D. EQUIPMENT	
E. SUPPLIES	
F. CONSULTANTS	
G. OTHER DIRECT COSTS	
SUBTOTAL	
H. INDIRECT COSTS	
H. INDIRECT COSTS	

Table 2: Detailed Budget Template

Line item description detail	Unit of measurement	December 1, 2020 through Feb 28, 2022			Total
		Unit cost	Number of units	Cost	
A. Personnel/Salaries					
B. FRINGE BENEFITS					
C. TRAVEL					
D. EQUIPMENT					
E. SUPPLIES					
F. CONSULTANTS					
G. OTHER DIRECT COSTS					

Line item description detail	Unit of measurement	December 1, 2020 through Feb 28, 2022			Total
		Unit cost	Number of units	Cost	
Subtotal					
H. INDIRECT COSTS					
ESTIMATED PROJECT TOTAL					