Request for Proposal

Consultancy: Embedding Monitoring, Evaluation, Research and Learning (MERL) into Innovation at Plan

Main Facts Table

<p>| | |</p>
<table>
<thead>
<tr>
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</thead>
<tbody>
<tr>
<td>RFP reference</td>
<td>RFP-FY19 - 105</td>
</tr>
<tr>
<td>RFP launch date</td>
<td>3rd May 2019</td>
</tr>
<tr>
<td>Contract Manager</td>
<td>Estefania Monaco</td>
</tr>
<tr>
<td>Deadline for submission of offers</td>
<td>31st May 2019</td>
</tr>
</tbody>
</table>

Submission of Proposals to

procurement@plan-international.org

Please include the RFP reference number above in all correspondence.
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PART 1 – INSTRUCTIONS TO PROPOSERS AND PROPOSAL CONDITIONS

1.1. Definition
For the purposes of this Request for Proposal (RFP) and any subsequent contract the following definitions, unless otherwise noted, apply.

Company
Means Plan Limited, hereafter know as Plan

Contract
Means any contract that results from this Request for Proposal

Contractor
Means the entity that forms a Contract with the Company for provision of the requirement.

Proposal
Means a written offer submitted in response to this Request for Proposal

Proposer
Means an entity that submits, or is invited to submit, a Proposal in response to this Request for Proposal

Requirement
Means the supply to be made by the Contractor to the Company in accordance with Part 2 of the RFP.

1.2. Summary of the Requirement
Plan Limited invites you to submit a Proposal for the provision of consultancy services to carry out Embedding Monitoring, Evaluation, Research and Learning (MERL) into Innovation at Plan. Further details of the requirement are described in Part 2 of this RFP.

1.3. Structure of this document
This RFP comprises four parts as described below:

<table>
<thead>
<tr>
<th>Part</th>
<th>Title</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Instructions to Proposers and Proposal Conditions</td>
<td>Sets out rules and requirements for participation in the RFP.</td>
</tr>
<tr>
<td>2</td>
<td>The Requirement</td>
<td>Sets out details of the requirement, including scope of works.</td>
</tr>
<tr>
<td>3</td>
<td>Information to be provided by Proposers</td>
<td>Sets out the minimum RFP response requirements to allow due consideration by the Company.</td>
</tr>
<tr>
<td>4</td>
<td>Proposed Contract</td>
<td>Sets out the applicable terms and conditions that will apply to any contract arising from this RFP.</td>
</tr>
</tbody>
</table>
1.4. RFP key dates
The following key dates apply to this RFP:

<table>
<thead>
<tr>
<th>RFP key dates</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>RFP Issue Date</td>
<td>3rd May 2019</td>
</tr>
<tr>
<td>Date for lodgement of Proposal Acknowledgement</td>
<td>7th May 2019</td>
</tr>
<tr>
<td>RFP Closing Date and Time</td>
<td>31st May 2019</td>
</tr>
<tr>
<td>Estimated Contract Award Date</td>
<td>TBC</td>
</tr>
</tbody>
</table>

1.5. Company contact
The following individual is the nominated Company contact for this RFP:

<table>
<thead>
<tr>
<th>Contact Information</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Name</strong></td>
<td>Mandy Roberts-York</td>
</tr>
<tr>
<td><strong>Title/Position</strong></td>
<td>Procurement Officer</td>
</tr>
<tr>
<td><strong>Telephone</strong></td>
<td>01483 733839</td>
</tr>
<tr>
<td><strong>Email address</strong></td>
<td><a href="mailto:procurement@plan-international.org">procurement@plan-international.org</a></td>
</tr>
<tr>
<td><strong>Postal address</strong></td>
<td>Block A, Dukes Court, Duke Street, Woking, Surrey GU21 5BH</td>
</tr>
</tbody>
</table>

1.6. Queries and questions during the RFP period
Proposers are to direct any queries and questions regarding the RFP content or process to the Plan contact. No other Plan personnel are to be contacted in relation to this RFP unless directed to do so by the Plan contact. Plan reserves the right to disqualify and reject Proposals that do not comply with this requirement. All questions should be submitted in writing to the nominated email address.

Plan may choose to convey responses to submitted questions and queries to all Proposers so that each is equally informed.

1.7. Amendments to RFP documents
Plan may amend the RFP documents by issuing notices to that effect to all Proposers and may extend the RFP closing date and time if deemed appropriate.

1.8. Proposal lodgement methods and requirements
Proposers must submit one copy of their Proposal to Plan in any of the following methods:

a) By email to: procurement@plan-international.org. The subject heading of the email shall be RFP FY19-105 Consultancy: Embedding Monitoring, Evaluation, Research and Learning (MERL) into Innovation at Plan. Electronic copies are to be submitted by PDF and native (eg MS
Word) format and proposers may submit multiple emails (suitably annotated – eg Email 1 of 3), or zipped, if attached files are deemed too large to suit a single email transmission.

Proposals must be prepared in English and in the format requested in Part 3 of this RFP.

1.9. Late Proposals
Proposers are responsible for submitting their Proposals prior to the RFP closing date and time in accordance with the acceptable lodgement requirements described in Clause Error! Reference source not found.. There will be no allowance made by Plan for any delays in transmission of the Proposal from Proposer to Plan. Any Proposal received by Plan later than the stipulated RFP closing date and time may be removed from further consideration by Plan.

1.10. Acceptance of Proposals
Proposal may be for all or part of the Requirement and may be accepted by Plan either wholly or in part. A Proposal will not be accepted by Plan unless and until Plan has signed a Contract or sent a ‘Notice of Award’ in writing to the successful Proposer.

Plan is under no obligation to accept the lowest priced Proposal or any Proposal and reserves the right to reject any Proposal which is incomplete, conditional or not complying with the RFP documents.

1.11. Alternative Proposals
Proposers may submit alternative Proposals if they feel it may offer Plan additional benefits whilst still complying with the Requirement. Plan reserves the right to accept or reject any proposed alternative either wholly or in part.

1.12. Validity of Proposals
Proposals submitted in response to this RFP are to remain valid for a period of 30 days from the RFP closing date.
1.13. **Evaluation of Proposals**

The minimum selection criteria to be used in the evaluation of Proposals include, the Consultant should but not limited to meet most of the following requirements:

<table>
<thead>
<tr>
<th>Criteria</th>
<th>Tenderers must demonstrate......</th>
<th>Weight</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Compliance</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tender Compliance and Completion</td>
<td>Completion of Tender Dossier</td>
<td>Pass/Fail</td>
</tr>
<tr>
<td><strong>Essential</strong></td>
<td>• Fluent in English (written, oral)</td>
<td>40%</td>
</tr>
<tr>
<td></td>
<td>• Demonstrated experience in gender, behavioural and social norm change, and digital for social impact</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Demonstrated experience in Human Centred Design and understanding of innovation techniques</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Demonstrated in-depth understanding and experience in Monitoring and Evaluation using Lean Data approaches and techniques</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Experience in gender transformative programming or research</td>
<td></td>
</tr>
<tr>
<td><strong>Desirable</strong></td>
<td>• Experience working on Monitoring and Evaluation, Innovation, research, and/or programming in the Global South</td>
<td>25%</td>
</tr>
<tr>
<td></td>
<td>• Experience working on children’s issues, especially girls’ rights</td>
<td></td>
</tr>
<tr>
<td><strong>Financial Proposal</strong></td>
<td>Pricing Schedule</td>
<td>35%</td>
</tr>
<tr>
<td>(35%)</td>
<td>• All-inclusive contract cost and cost breakdown provided.</td>
<td></td>
</tr>
</tbody>
</table>

These criteria are not in any particular order nor do they necessarily carry equal weight.

Plan may request additional information from Proposers to assist further evaluation of Proposals.

Shortlisted applicants may be invited to discuss their proposals in more detail at Plan’s discretion. Plan International, at its sole discretion, will select the successful consultant. Plan international shall be free to:

- Accept the whole, or part only, of any submission
- Accept none of the proposals
- Republish this ToR

Plan International reserves the right to keep confidential the circumstances that have been considered for the selection of the offers.
Part of the evaluation process may include a presentation from the supplier.

Value for money is very important to Plan International, as every additional cost saving is money that we can use on our humanitarian and development work throughout the world. Plan International may award multiple contracts and all contracts will be non-exclusive.

1.14. Withdrawals
Proposals may be withdrawn at any time prior to the RFP closing date and time by written notice to Plan.

1.15. Proposers to inform themselves
Plan has taken all reasonable care to ensure that the RFP is accurate, however, Plan gives no representation or warranty as to the accuracy or sufficiency of the contained information and that all Proposers will receive the same information. Proposers are required to inform themselves fully of all conditions, risks and other circumstances relating to the proposed contract prior to submitting a Proposal. Proposed prices shall be deemed to cover the cost of complying with all the conditions of the RFP and of all things necessary for the due and proper performance and completion of the Requirement.

1.16. Costs of preparing Proposals
All costs relating to the preparation and submission of a Proposal are the sole responsibility of the Proposer. Plan shall not pay any Proposer, wholly or in part, for its Proposal.

1.17. Confidentiality
Except as required for the preparation of a Proposal, Proposers must not, without Plan’s prior written consent, disclose to any third party any of the contents of the RFP documents. Proposers must ensure that their employees, consultants and agents also are bound and comply with this condition of confidentiality.

1.18. Inconsistencies and omissions
Proposers must promptly advise Plan in writing of any inconsistencies and omissions they discover in the RFP.

1.19. Proposal acknowledgement
By participating in this RFP Proposers are indicating their acceptance to be bound by conditions set out in this Part. Proposers’ are to acknowledge this acceptance, and furnish details of their representative that will be the sole point of contact for all matters relating to the RFP, in writing, to Plan prior to the proposal acknowledgement due date set out in Clause Error! Reference source not found..
Any Proposer choosing to not submit a Proposal is required to acknowledge this intent, in writing, to the Company and return all RFP documentation to the Company prior to the proposal acknowledgement due date.

1.20. Return of RFP documents
Proposers must return to Plan all issued hard copies of the RFP documents within seven (7) days of being notified that their Proposal was unsuccessful. Unsuccessful Proposers are to also permanently delete any electronic copies of RFP documents (either issued by Plan or created by the Proposer).

PART 2 – THE REQUIREMENT

2.1. Background Information on Plan International

Plan International is an independent development and humanitarian organisation that advances children's rights and equality for girls.

We believe in the power and potential of every child. But this is often suppressed by poverty, violence, exclusion and discrimination. And its girls who are most affected. Working together with children, young people, our supporters and partners, we strive for a just world, tackling the root causes of the challenges facing girls and all vulnerable children.

We support children’s rights from birth until they reach adulthood. And we enable children to prepare for – and respond to – crises and adversity. We drive changes in practice and policy at local, national and global levels using our reach, experience and knowledge.

We have been building powerful partnerships for children for over 75 years, and are now active in more than 70 countries.

Read more about Plan International’s Global Strategy: 100 Million Reasons at [https://plan-international.org/strategy](https://plan-international.org/strategy)

As a leader in the global movement for girls’ rights, our ambition is to take collective action so that 100 million girls learn, lead, decide and thrive. These ambitions require that we work in new ways and unleash our full creative potential. A year ago, Plan International built an Innovation Team, who have the expertise and skills to nurture creativity and help existing teams to develop innovations in the areas of programming, influencing, fundraising and operations. They provide hands-on support from the early stages of identifying a challenge statement through to the realisation of scalable impact for girls, through the application of “design thinking” methodologies.

Having completed our first year of Innovation at Plan International, we are seeking a consultant to support the team in embedding strong MERL practices into all our Innovation work.

2.2. Background information on Embedding Monitoring, Evaluation, Research and Learning (MERL) into Innovation at Plan

Plan International is seeking a consultant to work with the Innovation and MERL teams on embedding MERL standards and processes into our innovation work. The consultant will be expected to adapt Plan International’s MERL approach and develop enabling tools that comply with Plan’s standards and policies, are an intrinsic part of all our innovation work, and are lean, cost efficient and effective.
The consultant will be qualified and experienced in Innovation, Human Centered Design research, lean data, MERL approaches and best practices – with a focus on gender, social and behaviour change, and digital.

PART 3 – INFORMATION TO BE PROVIDED BY PROPOSERS

This Part details all the information proposers are required to provide to the Company. Submitted information will be used in the evaluation of Proposals

3.1. Deliverables

Working closely with the Innovation and MERL teams, the consultant will develop and lead the testing of a Learning and Evaluation (L&E) approach and toolkit for Plan International’s Innovation projects and an Innovation Results Framework that are lean, cost efficient and effective.

Specific deliverables:

- Narrative of L&E approach for innovation that focuses not only on measuring outcomes but also supports the improvement of projects and ensures they remain aligned with user needs and Plan’s strategy. We want to know not just ‘does it work’ but ‘why does it work?’
- L&E framework for innovation projects across all stages (Idea, Prototype, Pilot)
- Innovation Results Framework, including dashboard to present results
- Toolkit: tracking tool for learnings and measurements, indicators, data collection methods and tools, resource requirements (including roles and responsibilities of project leads), supporting documents and any other necessary tools

3.2. Approach and Methodology

Approach

Core Principles of the Innovation L&E approach:

- Human-centered: the people the project seeks to positively impact are at the centre of the L&E approach and related decision-making
- Lean and accessible to non-specialists
- Continuous learning: L&E is part of the DNA of every project, we learn and evolve fast
- Systematic: key metrics are consistent across all projects, as is the quality of L&E measurements.

Key Metrics:

- Human Desirability
- Technical Feasibility
- Business Viability (operational & financial sustainability)
- Strategic Alignment
- Innovation Fund spend (i.e value for money and ROI)
- Success/Fail
  - Reach v. impact
    - How do we define impact?
  - Potential for impact at scale
- So What? (i.e what is the next step for this project?)
3.3. Methodology

The consultant’s methodology should include a desk-based review using all relevant existing documentation and best practice both within Plan International as well as from external sources. The analysis from the desk review should inform key insights and findings that are used for the development of specific deliverables.

Key internal documents include:

- MERL Approach
- MERL Policy
- MERL Standards
- MERL Process
- Programme and Influencing Quality Policy
- M&E frameworks for Plan International’s AOGDs
- Plan International’s Gender Transformative approach to programming, advocacy, and campaigning
- Innovation strategy and methods
- Innovation Fund’s criteria and process
- Plan International’s Digital Principles
- Plan’s current strategy, 100 Million Reasons
- Innovation Fund application process and project kick-off pack

3.4. Users, Audience and Activities

3.4.1. Users and audiences of the deliverables

Deliverables will be used by Plan International staff who have a stake in innovation projects, from Product Owners through to support staff. They will also be used by the Innovation team and Plan International leadership to assess the value offer of innovation projects individually, and the value offer of innovation as an approach to programming, influencing, fundraising and operations work and its impact in supporting the realisation of the organisation’s strategy.
3.5. Activities
The following activities are expected of the consultant:

- Onboarding and review of objectives and deliverables with Innovation and MERL team (1 day)
- Desk-based review of all relevant internal policies and standards (2 days)
- Desk-based research of internal and external best practice (3 days)
- Download and insights generation with stakeholders (3 days)
- Draft the narrative of the L&E approach for innovation, iterate it based on stakeholder input (7 days)
- Draft the L&E framework for innovation projects, iterate it based on stakeholder input (10 days)
- Draft Innovation results framework, iterate it based on stakeholder input (10 days)
- Develop indicators, iterate based on stakeholder input (15 days)
- Develop data collection tools incorporating human-centred design and innovation techniques (15 days)
- Develop tracking tool and dashboard for presenting results both at the project and innovation levels (5 days)
- Develop supporting documentation, including resource requirements, roles and responsibilities for project leads (10 days)
- Test approach, tools, and frameworks on innovation projects, and iterate (50 days)
- Write up final deliverables based on results of test and debrief Innovation and MERL teams (10 days)

The consultancy will span a maximum of 120 days over a period of 6 months between June and January 2020. This consultancy is based at Plan International’s Woking Global Hub, with flexibility to work remotely.

The Innovation Project Lead for this project will manage this consultancy. In addition, the consultant will have a matrix reporting line to the MERL Officer. The consultant will work closely with both staff members as well as with the wider Innovation and MERL teams.

3.6. Timeline
The consultancy will be divided into three main phases:

<table>
<thead>
<tr>
<th>Description</th>
<th>Timelines</th>
</tr>
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<tbody>
<tr>
<td>Develop an intervention logic and a results framework with indicators, tools, resource requirements and other supporting documentation.</td>
<td>July – September 2019</td>
</tr>
<tr>
<td>Test deliverables on innovation projects, iterate and write up final deliverables</td>
<td>September – January 2020</td>
</tr>
</tbody>
</table>

3.7. Submission of Offers
Please submit the following documents:
• A cover letter outlining how you meet the expected criteria, including relevant experience.
• CVs of the consultant(s) who will carry out the work.
• Two samples of previous work in Monitoring and Evaluation, Human Centred Research, or Innovation.
• A technical proposal, outlining details of their methodology and approach to this work in accordance to this TOR

3.8. Pricing information
This clause sets out the information necessary for Proposers to furnish rates and prices as consideration for delivering the Requirement against any resultant Contract.

A financial proposal, with an estimation of days for the completion of all deliverables and day rate - please note that it is highly unlikely that day rates and costs will be able to be re-negotiated once the contract has been signed.

The payment is in instalments monthly, and subject to Plan International’s approval of the consultant’s monthly invoice

Prices include all costs

Submitted rates and prices are to deemed include all costs, insurances, taxes, fees, expenses, liabilities, obligations risk and other things necessary for the performance of the requirement. Any charge not stated in the Proposal as being additional, will not be allowed as a charge against any transaction under any resultant contract.

Applicable Goods and Services Taxes

Proposal rates and prices shall be exclusive of United Kingdom Value Added Tax.

Currency of proposed rates and prices

Unless otherwise indicated, all rates and prices submitted by Proposers shall be in GBP £ sterling.

PART 4 – PROPOSED CONTRACT

Successful Tenderers will be expected to enter into a formal contract with Plan International

A copy of the standard Plan Terms and Conditions are attached at Appendix D which will form the basis of this contract.