



IPA

Request For Proposals (RFP)

No. IPA/RFP/L&D/009/2024

RFP for Provision of E-Learning Services for Compliance Training
Program

Issue Date: 9th August 2024

WARNING: Prospective Offerors who have received this document from a source other than [IPA's website](#) should contact global-procurement@poverty-action.org to register. Provide the firm's name, contact person, title, and company email address to receive amendments to the RFP or other communications directly. Offerors who fail to register assume responsibility for not receiving communications before the closing date. Amendments to this solicitation will be posted on the same webpage.

Table of Contents

1. Introduction and Purpose	4
1.1 Purpose	4
1.2 Issuing Office.....	4
1.3 Type of Award Anticipated	4
2. General Instructions to Offerors	4
2.1 General Instructions	4
2.2 Proposal Cover Letter	4
2.3 Questions regarding the RFP	4
3. Instructions for the Preparation of Technical Proposals	5
3.1 Services Specified.....	5
4. Instructions for the Preparation of Cost/Price Proposals	5
4.1 Cost/Price Proposals.....	5
5. Basis of Award	5
5.1 Evaluation Criteria	5
5.2 Proposal Requirements.....	6
5.3 Proposal Submission Format.....	6
5.4 Best Value Determination	7
5.5 Responsibility Determination	7
5.6 Additional Due Diligence	8
5.7 Bidders' Presentations / Demos.....	8
6. Inspection & Acceptance	8
7. Compliance with Terms and Conditions	8
7.1 General Terms and Conditions	8
8. Procurement Ethics	8
9. Attachments	10
9.1 Scope of Work for Services or Technical Specifications	10
9.2 Price Schedule	13
9.3 Past Performance Form	14
9.4 Terms and Conditions	15

Synopsis of the RFP

RFP No.	IPA/RFP/L&D/009/2024
Issue Date	8th August 2024
Title	RFP for Provision of E-Learning Services for Compliance Training Program
Issuing Office	Innovations for Poverty Action 1701 Rhode Island Ave NW, Suite 3-124 Washington, DC 20036
Deadline for Receipt of Questions	Thursday 15th August 2024 at 5 PM Eastern Time (ET) (Responses to questions or clarifications will be shared within 48 hours after the clarification window closes)
Point of Contact for Questions	global-procurement@poverty-action.org Include the RFP number in the subject line.
Deadline for Receipt of Proposals	Friday 23rd August 2024 at 5 PM Eastern Time (ET)
Proposal Submission Address	global-proposals@poverty-action.org STRICTLY include the RFP number in the subject line.
Anticipated Award Type	Vendor Agreement
Basis for Award	The award will be issued to the responsible and reasonable offeror who provides the best value to IPA and its client using a combination of technical and cost/price factors.

1. Introduction and Purpose

1.1 Purpose

IPA invites qualified offerors to submit proposals in response to the RFP for the Provision of E-Learning Services for the Compliance Training Program. Details of the specific requirements can be found in the Scope of Work section.

1.2 Issuing Office

The Issuing Office and Contact Person noted in the above synopsis is the sole point of contact at IPA for purposes of this RFP. Any prospective offeror who fails to register their interest with this office assumes complete responsibility in the event that they do not receive direct communications (amendments, answers to questions, etc.) prior to the closing date.

1.3 Type of Award Anticipated

IPA anticipates awarding a Vendor Agreement. This award type is subject to change during the course of negotiations.

2. General Instructions to Offerors

2.1 General Instructions

“Offeror”, “Subcontractor”, and/or “Bidder” means a firm proposing the work under this RFP. “Offer” and/or “Proposal” means the package of documents the firm submits to propose the work.

Offerors wishing to respond to this RFP must submit proposals, in English, in accordance with the following instructions. Offerors are required to review all instructions and specifications contained in this RFP. Failure to do so will be at the Offeror’s risk. If the solicitation is amended, then all terms and conditions not modified in the amendment shall remain unchanged.

Issuance of this RFP in no way obligates IPA to award a subcontract or purchase order. Offerors will not be reimbursed for any costs associated with the preparation or submission of their proposal. IPA shall in no case be responsible or liable for these costs.

Proposals are due no later than **Friday 23rd August 2024 at 5 PM Eastern Time (ET)**, to **global-proposals@poverty-action.org**. Late offers will be rejected.

The submission of a proposal to IPA in response to this RFP will constitute an offer and indicates the Offeror’s agreement to the terms and conditions in this RFP and any attachments hereto. IPA reserves the right not to evaluate a non-responsive or incomplete proposal.

2.2 Proposal Cover Letter

A cover letter shall be included with the proposal on the Offeror’s company letterhead with a duly authorized signature and company stamp/seal using the [Proposal Cover Letter template](#) (see Attachments) for the format. The cover letter shall include the following items:

- The Offeror will certify a validity period of 90 days for the prices provided.
- Acknowledge the solicitation amendments received.

2.3 Questions Regarding the RFP

Each Offeror is responsible for reading and complying with the terms and conditions of this RFP. Requests for clarification or additional information must be submitted in writing via email or in writing to the Issuing Office as specified in the Synopsis above. No questions will be answered by phone. Any verbal information received from an IPA’s employee or other entity shall not be considered as an official response to any question regarding this RFP.

Copies of questions and responses will be distributed in writing to all prospective bidders who are on record as having received this RFP after the submission date specified in the Synopsis above.

3. Instructions for the Preparation of Technical Proposals

Technical proposals shall include the information requested under section 5.2 and also include the following contents:

1. **Technical Approach:** Description of the proposed services that meets or exceeds the stated technical specifications or scope of work. The proposal must show how the Offeror plans to complete the work and describe an approach that demonstrates the achievement of timely and acceptable performance of the work.
2. **Management Approach:** Description of the Offeror's staff assigned to the activity. The proposal should describe how the proposed team members have the necessary experience and capabilities to carry out the Technical Approach.
3. **Past Performance:** Provide a list of at least two (two) recent awards of similar scope and duration. The information shall be supplied as a table ([template provided in Attachments](#)) and shall include the legal name and address of the organization for which services were performed, a description of work performed, the duration of the work, and the value of the contract, description of any problems encountered and how it was resolved, and a current contact phone number of a responsible and knowledgeable representative of the organization. See Attachments. Ensure that no confidential information is shared. If references are needed, we will use the contacts you provide.

3.1 Services Specified

For this RFP, IPA is in need of the services described in Attachment: Scope of Work.

4. Instructions for the Preparation of Cost/Price Proposals

4.1 Cost/Price Proposals

Provided in the Attachments section of this RFP is a template for the [Price Schedule for firm-fixed-price awards](#). For cost-reimbursable or time & material awards, the offeror shall provide a fully detailed budget. Offerors shall complete the template including as much detailed information as possible. Any required payment terms must be included in the cost proposal.

It is important to note that Value Added Tax (VAT) shall be included on a separate line. The Subcontractor is responsible for all applicable taxes and fees, as prescribed under the applicable laws for income, compensation, permits, licenses, and other taxes and fees due as required.

5. Basis of Award

5.1 Evaluation Criteria

Each proposal will be evaluated and scored against the evaluation criteria and evaluation sub-criteria, which are stated in the table below.

Evaluation Criteria	Maximum Points (100)
Overall alignment with requirements (SoW)	25
Instructional design quality and course content	25
Account management and customer service approach	25

Overall costs and cost structure	25
Total	100

5.2 Proposal Requirements

a. Requested materials for review:

- Review access for 4 users to sample versions of courses related to the following topics:
 - Code of conduct
- Code of conduct
- Harassment
- Discrimination
- Conflicts of interest
- Fraud
- Bribery
- Gifts and entertainment
- Whistleblowing/anti-retaliation
- Fee schedule with detailed breakdown (in USD) on a per-module basis for 650, 1000, and 2000 learners per year
 - Quotes should explain any potential cost variation related to learner numbers, number of courses used, number of languages used, contract length, or other factors
- General vendor information including:
 - Course authoring process by vendor
 - Course editing process by IPA/vendor
 - Confirmation that delivery via SCORM export to a Moodle Workplace-based LMS is a strong technical fit for this vendor
 - Course performance in low-bandwidth or offline environments
 - Suitability for a wide range of global/cultural contexts

b. Vendor customer service processes

c. Work plan with key milestones highlighted

5.3 Proposal Submission Format

To facilitate the evaluation process by the Evaluation Committee, Offerors are strongly encouraged to submit their proposals in the following format:

i. Cover Letter

- Include a concise cover letter introducing your proposal. Use the provided template.

ii. Introduction / Business Profile

- Provide an overview of your organization, its history, and relevant experience.

iii. Statutory and Compliance Documents

- Include essential documents such as business registration, tax files, and any other relevant compliance documents.

iv. Technical Proposal

- Refer to Section 3 for detailed instructions on preparing the technical proposal.
- Ensure to provide all necessary supporting documentation and attachments as required by the Evaluation Criteria.

v. Cost / Price Proposal

- Include detailed cost/price information as outlined in Section 4.
- Should be realistic and acceptable.

vi. Implementation Timelines / Gantt Chart (if applicable)

- Include timelines or Gantt charts outlining project implementation schedules if relevant to your proposal.

vii. Any Other Pertinent Information

- Include any additional information that you believe is essential to your proposal.

Please adhere to this format to ensure a structured and comprehensive submission that will aid in the evaluation process.

5.4 Best Value Determination

IPA will review all proposals and make an award based on the technical and cost evaluation criteria stated above and select the offeror whose proposal provides the best value to IPA. IPA may also exclude an offer from consideration if it determines that an Offeror is "not responsible", i.e., that it does not have the management and financial capabilities required to perform the work required.

IPA may award to an Offeror without discussions. Therefore, the initial offer **must contain the Offeror's best price and technical terms.**

5.5 Responsibility Determination

IPA will not enter into any type of agreement with an Offeror prior to ensuring the Offeror's responsibility. When assessing an Offeror's responsibility, the following factors are taken into consideration:

1. Provide evidence of the required business licenses to operate.
2. They are not included in CSI WatchDOG Sanctions lists
3. Having adequate financial resources to finance and perform the work or deliver goods or the ability to obtain financial resources without receiving advance funds from IPA.
4. Ability to comply with required or proposed delivery or performance schedules.
5. Have a satisfactory past performance record.
6. Have a satisfactory record of integrity and business ethics.
7. Have the necessary organization, experience, accounting and operational controls and technical skills.
8. Be qualified and eligible to perform work under applicable laws and regulations.
9. They are able to comply fully with IPA's General Terms and Conditions of Contract resulting from this RFP

5.6 Additional Due Diligence

Upon completing the evaluation process, IPA may choose to engage in additional due diligence processes with a particular vendor or vendors without notifying the bidder. The purpose of this process is to ensure that IPA engages with reputable, ethical, and responsible vendors with solid financials and the ability to fulfill the contract. Additional due diligence may include, but is not limited to, the following processes:

- Reference checks
- Verification of whether the firm has been barred by any organization or is on any anti-terrorist checklist

5.7 Bidders' Presentations / Demos

At the discretion of IPA, selected Offeror(s) may be invited to supply additional information on the contents of their proposal during the evaluation period. Such Offerors could be asked to give a demo or presentation of their proposal (possibly with an emphasis on a topic of IPA's choice) followed by a question-and-answer session.

If IPA deems a presentation necessary, it will be held virtually, and details will be provided in advance. Offerors will be given reasonable time to prepare.

NOTE: Presentations or other individual contact is expressly prohibited before the closing date for proposal submission.

6. Inspection & Acceptance

The designated IPA staff will inspect from time to time the services being performed to determine whether the activities are being performed in a satisfactory manner, and that all equipment or supplies are of acceptable quality and standards. The subcontractor shall be responsible for any countermeasures or corrective action, within the scope of this RFP, which may be required by the IPA Country Director/Representative as a result of such inspection.

7. Compliance with Terms and Conditions

7.1 General Terms and Conditions

Offerors agree to comply with the general terms and conditions for an award resulting from this RFP. The selected Offeror shall comply with all Terms and Conditions listed in the accompanying [Attachment](#).

8. Procurement Ethics

Neither payment nor preference shall be made by either the Offeror or by any IPA staff, in an attempt to affect the results of the award. IPA treats all reports of possible fraud/abuse very seriously. Acts of fraud or corruption will not be tolerated, and IPA employees and/or subcontractors/grantees/vendors who engage in such activities will face serious consequences. Any such practice constitutes an unethical, illegal, and corrupt practice and either the Offeror or the IPA staff may report violations to the Toll-Free Ethics and Compliance Anonymous Hotline at +1 844 837 5445. IPA ensures anonymity and an unbiased, serious review and treatment of the information provided. Such practice may result in the cancellation of the procurement and disqualification of the Offeror's participation in this, and future, procurements.

By submitting an offeror, Offerors certify that they have not/will not attempt to bribe or make any payments to IPA employees in return for preference, nor have any payments with Terrorists, or groups supporting Terrorists, been attempted.

9. Attachments

9.1 Scope of Work for Services or Technical Specifications

Innovations for Poverty Action (IPA) is a research and policy nonprofit that discovers and promotes effective solutions to global poverty problems. We have over 500 staff operating in over 20 countries. We run procurements and manage sensitive data governed by many sets of standards, including those of FCDO, USAID, and Nigeria. While some staff work from offices, many work from home at least half-time, and/or while traveling. We seek a compliance training e-learning vendor meeting the following specifications:

Technical Specifications:

Required:

- Access to interactive e-courses on compliance topics including the following. Courses must be exportable as SCORM files and compatible with a Moodle Workplace-based LMS. Courses should be authored and updated with legal expertise.
 - ✓ Code of Conduct
 - ✓ Harassment and discrimination prevention (including both a module for global audiences— and US-specific modules— including ones for US states that require specific content (e.g. NY, CT, and California, etc.)
 - ✓ Fraud and bribery prevention
 - ✓ Fraternalization and nepotism prevention
 - ✓ Data privacy
 - ✓ Conflicts of interest
 - ✓ Whistleblowing
 - ✓ Gifts & entertainment
 - ✓ Anti-retaliation
- Ability to make or request edits to course text
- Availability in English, Spanish, and French
- Suitability for a wide range of cultural legal contexts— the majority of our staff are based in Africa and frequently work in non-office contexts
- Suitability for use in low-bandwidth environments
- Strong customer service infrastructure enabling both long-term planning with a consistent technical partner and rapid troubleshooting when issues occur
- Ensuring real-time compliance by updating all modules to ensure legal/regulatory changes are met and customers are notified of the same

Preferred:

- Potential to affordably scale to ~3k learners on a two-to-four-year timeframe
- Availability of supplemental materials enabling delivery of aligned trainings in person or synchronously online

- Access to additional materials on related topics for potential future use

Evaluation Criteria:

We will evaluate based on:

- Overall alignment with requirements
- Overall costs and cost structure
- Instructional design quality and course content
- Account management and customer service approach

Requested materials for review:

- Review access for four users to sample versions of courses related to the following topics:
 - Code of conduct
 - Harassment
 - Discrimination
 - Conflicts of Interest
 - Fraud
 - Bribery
 - Gifts and Entertainment
 - Whistleblowing/anti-retaliation
- Overview of costs on a per-module basis for 650, 1000, and 3000 learners per year
 - Quotes should explain any potential cost variation related to learner numbers, number of courses used, number of languages used, contract length, or other factors
- General vendor information including:
 - Full list of available modules
 - Course authoring process by vendor
 - Course editing process by IPA/vendor
 - Confirmation that delivery via SCORM export to a Moodle Workplace-based LMS is a strong technical fit for this vendor
 - Course performance in low-bandwidth or offline environments
 - Suitability for a wide range of global/cultural contexts
 - Vendor customer service processes
 - Vendor processes for updating courses over time

Proposal Cover Letter

[On Firm's Letterhead]

<Insert date>

TO: Innovations for Poverty Action
[Address]

We, the undersigned, provide the attached proposal in accordance with **RFP-**
(insert number). issued on (insert date). Our attached proposal is for the total
price of (Sum in Words).

I certify a validity period of (enter number) days for the prices provided in the attached
Price Schedule/Bill of Quantities. Our proposal shall be binding upon us subject to the
modifications resulting from any discussions.

We understand that IPA is not bound to accept any proposal it receives.

Yours sincerely,

Authorized Signature:

Name and Title of Signatory: Click here to enter text.

Name of Firm: Click here to enter text.

Address: Click here to enter text.

Telephone: Click here to enter text.

Email: Click here to enter text.

Company Seal/Stamp:

9.2 Price Schedule

The price schedule should show an overview of the Offeror's pricing approach that explains what it would cost on a per-module basis for 650, 1000, and 3000 learners per year.

Quotes (in USD currency) should explain any potential cost variation related to learner numbers, number of courses used, number of languages used, contract length, or other factors

9.3 Past Performance Form

Include projects that best illustrate your work experience relevant to this RFP, sorted by decreasing order of completion date.

Projects should have been undertaken in the past three years. Projects undertaken in the past six years may be taken into consideration at the discretion of the evaluation committee.

#	Description of Activities	Location Province/ District	Client Name/Tel No/ email address	Cost	Start-End Dates	Complete d on schedule (Yes/No)	Completion Letter Received? (Yes/No)	Type of Agreement (fixed price, cost reimbursable)
1								
2								
3								
4								
5								

9.4 Terms and Conditions

- a) The Request for Proposal is not and shall not be considered an offer by IPA.
- b) All responses must be received on or before the date and time indicated on the RFP.
- c) All proposals will be considered binding offers. The prices proposed must be valid for the entire period provided by the respondent.
- d) All awards will be subject to IPA contractual terms and conditions and contingent on the availability of donor funding.
- e) IPA reserves the right to accept or reject any proposal or cancel the solicitation process at any time and shall have no liability to the proposing organizations submitting proposals for such rejection or cancellation of the request for proposals.
- f) IPA reserves the right to accept all or part of the proposal when award is provided.
- g) IPA shall solely own all intellectual property (e.g. datasets, material, etc.) created under the resulting award.
- h) All information provided by IPA in this RFP is offered in good faith. Individual items are subject to change at any time, and all bidders will be provided with notification of any changes. IPA is not responsible or liable for any use of the information submitted by bidders or for any claims asserted therefrom.
- i) IPA reserves the right to require any bidder to enter into a non-disclosure agreement.
- j) The bidders are solely obligated to pay for any costs, of any kind whatsoever, which may be incurred by the bidder or any third parties, in connection with the Response. All responses and supporting documentation shall become the property of IPA, subject to claims of confidentiality in respect of the response and supporting documentation, which have been clearly marked confidential by the bidder.