El Salvador Skills for Employment (SEP)

Request For Proposals (RFP)

No. RFP-001-MEL-2024

CONSULTANCY FOR THE DEVELOPMENT OF
MONITORING, EVALUATION AND LEARNING SOFTWARE

Issue Date: March 15, 2024

WARNING: Prospective Offerors who have received this document from a source other than the DAI Global, LLC / USAID Skills for Employment (SEP), should immediately contact SEP_procurement@dai.com and provide their name and mailing address in order that amendments to the RFP or other communications can be sent directly to them. Any prospective Offeror who fails to register their interest assumes complete responsibility in the event that they do not receive communications prior to the closing date. Any amendments to this solicitation will be issued and posted.

DAI conducts business under the strictest ethical standards to assure fairness in competition, reasonable prices and successful performance or delivery of quality goods and equipment. DAI does not tolerate corruption, bribery, collusion or conflicts of interest. Any requests for payment or favors by DAI employees should be reported as soon as possible to ethics@dai.com or by visiting www.dai.ethicspoint.com. Further, any attempts by an offeror or subcontractor to offer inducements to a DAI employee to influence a decision will not be tolerated and will be grounds for disqualification, termination and possible debarment. See provision No. 9 for more details.

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Synopsis of the RFP

RFP No.	RFP-001-MEL-2024
Issue Date	March 15, 2024
Title	CONSULTANCY FOR THE DEVELOPMENT OF A MONITORING, EVALUATION AND LEARNING SOFTWARE
Issuing Office & Email/Physical Address for Submission of Proposals	Skills for Employment Project / Proyecto Habilidades para el Empleo Urbanización La Mascota, pasaje 3 No.27, San Salvador, El Salvador
Deadline for Receipt of Questions	March 29, 2024
Deadline for Receipt of Proposals	April 16, 2024, 10 PM EST.
Point of Contact	**SEP_procurement@dai.com**
Anticipated Award Type	Firm Fixed Price Subcontract
Basis for Award	An award will be made based on the Trade Off Method. The award will be issued to the responsible and reasonable offeror who provides the best value to DAI and its client using a combination of technical and cost/price factors.

Interested Offerors may obtain a full copy of the RFP which contains detailed instructions for preparation of the proposal. The RFP may be collected from the address and/or contact person above.

1. Introduction and Purpose

1.1 Purpose

DAI, the implementer of the USAID Skills for Employment Project (SEP), invites qualified firms to submit proposals to supply and deliver a customized Monitoring, Evaluation and Learning (MEL) System in support of program implementation. The purpose of the consultancy is to design and develop a customized Monitoring and Evaluation (M&E) system, adjusting to the needs of SEP-MEL and the DAI infrastructure, based on the framework of Microsoft Dynamics 365 CRM and data visualization in Microsoft Power BI, in such a way that it allows the loading of databases, creation of reporting modules and graphic visualization for the monitoring and follow-up of the indicators of the Monitoring, Evaluation and Learning Plan (MELP) of SEP.

1.2 Issuing Office

The Issuing Office and Contact Person noted in the above synopsis is the sole point of contact at DAI 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 dated.

1.3 Type of Award Anticipated

DAI anticipates awarding a Firm Fixed Price Subcontract. This subcontract type is subject to change during the course of negotiations.

A Firm Fixed Price Subcontract is: An award for a total firm fixed price, for values more than $150,000, for the provision of specific services, goods, or deliverables and is not adjusted if the actual costs are higher or lower than the fixed price amount. Offerors are expected to include all costs, direct and indirect, into their total proposed price.

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 and Spanish, 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 DAI to award a subcontract or purchase order. Offerors will not be reimbursed for any costs associated with the preparation or submission of their proposal. DAI shall in no case be responsible for liable for these costs.

Proposals are due no later than **April 16, 2024, 10 PM EST**. to be submitted to the **SEP_procurement@dai.com** , and state that the RFP number and title of the activity in the subject line of the email. Late offers will be rejected except under extraordinary circumstances at DAI's discretion.

The submission to DAI of a proposal 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 here. DAI 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 Attachment B as a template 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 a DAI or (SEP) 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 via email 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 be sent via email as a separate word file from cost/price proposals and shall be clearly identified as "VOLUME I: TECHNICAL PROPOSAL".

Technical proposals shall include the following contents:

1. Technical Approach - Description of the proposed services which 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 project. 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 three (3) recent awards of similar scope and duration. The information shall be supplied as a table 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 Attachment F.

3.1 Services Specified

For this RFP, DAI is in need of the services described in Attachment A.

3.2 Technical Evaluation Criteria

Each proposal will be evaluated and scored against the evaluation criteria and evaluation sub-criteria, which are stated in the table below. Cost/Price proposals are not assigned points, but for overall evaluation purposes of this RFP, technical evaluation factors other than cost/price, when combined, are considered significantly more important than cost/price factors.

	ASPECTS TO BE EVALUATED IN THE PROPOSAL FOR THE CONSULTANCY	Score
	1. Experience of the consulting firm	**25**
1.1	**With verifiable general experience in consultancies related to:**	**10**
	The development of relational database management systems and business intelligence tools for organizations.	**4**
	More than 10 years of experience	4
	Between 5 and 10 years of experience	3
	Less than 5 years of experience	1
	Proven experience or a portfolio of previous work in a Microsoft environment with cloud environments.	**4**
	More than 5 years of experience	4
	4 to 5 years of experience	3
	Less than 3 years of experience	1
	Previous experience working with international cooperation projects, especially USAID implementers.	**2**
	4 to 5 years of experience	2
	Less than 3 years of experience	1
1.2	**With specific verifiable experience in:**	**15**
	Consulting or a portfolio on topics related to the design and implementation of relational database management systems that leverage disparate data sets, data connectivity, data reporting and visualization in support of business analysis and decision making.	**3**
	More than 5 consultancies of experience	3
	Between 4 to 5 consultancies of experience	2
	Less than 3 consultancies of experience	1
	Experience in IT and software development	**3**
	More than 5 years of experience	3
	4 to 5 years of experience	2
	Less than 3 years of experience	1
	Proven experience or a portfolio of previous work in CMR Dynamics 365 customization	**3**
	More than 5 years of experience	3
	4 to 5 years of experience	2

	Less than 3 years of experience	1
	Proven experience or a portfolio in designing and structuring Planning and/or Monitoring and Evaluation software	**3**
	More than 5 years of experience	3
	4 to 5 years of experience	2
	Less than 3 years of experience	1
	Experience in web reporting and experience in database connection to Fulcrum, Kobotoolbox and/or similar	**3**
	More than 5 years of experience	3
	4 to 5 years of experience	2
	Less than 3 years of experience	1
	2. Training and Experience of the Consulting Team	**35**
2.1	**The Coordinator**	**13**
	With an **academic background** in Systems Engineering or related professions.	**3**
	Minimum 5 years of experience as a developer in all stages of the chain, from back-end to front-end.	**3**
	Preferably a master's degree specialized in software development.	**2**
	Proficiency in Spanish	**2**
	At least 5 years of **professional experience** in IT Solutions Coordination roles, specifically related to the design and implementation of relational database management systems that leverage disparate data sets, data connectivity, data reporting and visualization in support of business analysis and decision making.	**3**
	More than 5 years of experience	3
	4 to 5 years of experience	2
	Less than 3 years of experience	0
2.2	**Technical Team:**	**22**
	With **specific experience** in consulting on issues related to:	**15**
	Application development in web environment (using XML, HTML, JavaScript, CSS, web services) and object-oriented programming (e.g.: NET/C#, ASP.NET, Java, Visual Studio, .NET Core, plugins, workflow activities)	2
	Experience in Front-End development frameworks (e.g., React, Angular)	2
	Advanced knowledge and experience with Dynamics 365 suite applications, especially Dynamics 365 Customer Engagement (CRM).	3

	Power BI experience: data extraction from different sources, data modeling, report and dashboard creation.	2
	Experience with relational databases (e.g., Microsoft SQL server)	2
	Experience in API development and integration using .Net/C# or similar.	2
	Experience with common database solutions (design and build) (PostgreSQL, SQL Server, MySQL, etc.)	2
	Desirable experience:	**7**
	Knowledge of development for containerized infrastructure (Docker/Kubernetes)	1
	Knowledge of DevOps processes, including CI/CD	1
	Knowledge of agile software development processes.	1
	Knowledge of Azure DevOps, Power Platform, Azure Portal	1
	Knowledge of microservices-oriented applications	1
	Experience working with international cooperation projects, especially USAID.	1
	At least one technical counterpart proficient in Spanish language	1
	3. Methodology, technical approach	**40**
3.1	**Clarity and conceptual and technical soundness of the proposal.**	**5**
	Analysis of the approach, methods, areas of work and planned activities and their consistency and technical soundness	5
3.2	**Fulfillment of objectives and products**	**15**
	The proposed objectives and products are largely in line with the requirements of the TOR and the proposal presents an innovative component that enriches the work to be carried out.	15
	The proposed objectives and outputs are largely in line with the requirements of the TOR.	10
3.3	**The proposed methodology expresses knowledge of the work's implementation stages and components**	**10**
3.4	**Structure of the technical proposal**	**5**
	Contains all the activities requested in the TOR and incorporates the basic structure requested in Annex A.	5
	Contains the activities requested in the TOR.	4
3.5	**Provides enough detail to differentiate its approach from others**	**4**
3.6	**Details the scope of the technical support and assistance to be provided as a warranty after 6 months of delivery of the system**	**1**
	Evaluation total	**100**

4. Instructions for the Preparation of Cost/Price Proposal

4.1 Cost/Price Proposals

Cost/Price proposals shall be sent vía email as a separate excel and PDF file from technical proposals and shall be clearly identified as “VOLUME II: COST/PRICE PROPOSAL”.

Provided in Attachment C is a template for the Price Schedule, for firm-fixed price awards. Offerors shall complete the template including as much detailed information as possible.

These services are eligible for VAT exemption under the DAI prime contract.

5. Basis of Award

5.1 Best Value Determination

DAI 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 DAI. DAI 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.

Evaluation points will not be awarded for cost. Cost will primarily be evaluated for realism and reasonableness. DAI may award to a higher priced offeror if a determination is made that the higher technical evaluation of that offeror merits the additional cost/price.

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

5.2 Responsibility Determination

DAI 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 in the host country.
2. Evidence of an Unique Entity ID (SAM) (explained below and instructions contained in Attachment D).
3. The source, origin and nationality of the products or services are not from a Prohibited Country (explained below).
4. 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 DAI.
5. Ability to comply with required or proposed delivery or performance schedules.
6. Have a satisfactory past performance record.
7. Have a satisfactory record of integrity and business ethics.
8. Have the necessary organization, experience, accounting and operational controls and technical skills.
9. Have the necessary production, construction and technical equipment and facilities if applicable.
10. Be qualified and eligible to perform work under applicable laws and regulations.

6. Anticipated post-award Deliverables.

Upon award of a subcontract, the deliverables and deadlines detailed below will be submitted to DAI. The Offeror should detail proposed costs per deliverable in the Price Schedule. All of the deliverables must be submitted to and approved by DAI before payment will be processed.

Deliverable/Product 1: Work plan, timeline and definition of main functionalities of the MEL system software.

- Work plan, schedule of activities and deliverables including platform design, development, testing and maintenance.
- Document with the definition of the main functionalities that are mandatory and minimum for a viable product, which will include the consultant's recommendations on the most appropriate functionalities, software and applications that can be implemented within the framework of the system's objectives, all of which will be defined jointly with SEP's Technical Team, MEL and IT.

Time frame: 30 calendar days from the date of signature of the Firm Fixed Price Subcontract.

Deliverable/Product 2: Custom software design and development adjusting to the needs of MEL-SEP and DAI infrastructure, cloud environment—Azure, SQL database engine and data visualization in Power BI.

✓ Product Development Report 2, minimally detailing the completion of the following processes:

- Functional demo version for user test acceptance with the following key functionalities:

    1. Interface designed and operating with the minimum modules for information entry by the implementing partners.
    2. Direct data entry into the platform, or by importing existing data from DAI Collect or Excel files by implementing partners.
    3. Generation of numerical reports and dashboards aggregated by module and individual by implementing partner, from the data collected through the platform, according to specific requirements defined by SEP and its MELP.[1]

- CRM configurations and customization for the main modules of the system.
- Database model and validations.
- User testing.
- Functional version for user test acceptance.

Time frame: 60 calendar days from the approval of the first deliverable/product.

[1] Although data uploading and reporting by implementing partners is expected to occur on a monthly basis, reports should be generated automatically using the data available to date.

Deliverable/Product 3: Final version of the MEL system software.

✓ Product Development Report 3, minimally detailing the completion of the following processes:

- Final version of the MEL System, including the remaining functionalities (in quality and production environment):
  1. Generation of balanced scorecards by implementing partner and overall project, based on the programming of its specific goals and progress in execution by quarter, year and overall, to manage the technical, financial, administrative and MEL monitoring of the grants. The module must allow to compile the progress in the activities implemented by the grants and must have the capacity to produce visual outputs in dashboard format through the Microsoft Dynamics or Power BI platform.
  2. Internal messaging on the platform for monitoring and validation of the information entered, according to the workflow defined, allowing notification via alerts and/or e-mail for review and/or correction of the data to the implementing partners, Technical Team or MEL.

- Delivery of the Source Code, guaranteeing that the system will not be replicated, nor the code, which will be the intellectual property of DAI Global LLC.
- User testing of the system in production.
- Support plan—delivery to the MEL and IT team of operation manuals and training in the operation of the system.
- Design and delivery of operating manuals.
- Training on system operation and interface for the SEP team and at least 1 for each SEP implementing partner.
- Upload and cleanup of all technical implementation information existing at the date of delivery of the final version of the MEL System, according to the structure designed for the MEL System. This will include progress data on indicators for each of the implementing partners, participant records, supporting documents, forms per participant, among others.

Time frame: 60 calendar days from the approval of the second deliverable/product.

Deliverable/Product 4: Development, implementation and testing of the application for registration of participants in SEP activities.

✓ Product Development Report 4, minimally detailing the completion of the following processes:
- Consolidated report on the design, development and implementation of the Monitoring System (Final Report).
- PPT including highlights of the system design and development, obstacles and recommendations for improvement.
- Templates for submitting comments on the operation of the system after its delivery and that will serve as a guide for subsequent technical support.
- Consolidation and systematization of observations on system performance.
- Post-development system remediation reporting and implementation process.

At the end of the delivery of this product will enter into force the warranty period of 6 months that will be dedicated to the implementation of adjustments and calibration of the system. After these 6 months, a report will be delivered detailing the technical support provided and the corrections made during this period.

Time frame: 45 calendar days from approval of the third deliverable/product.

7. Inspection & Acceptance

The designated **Deputy Chief of Party-Technical and the Director of Monitoring, Evaluation and Learning of the SEP** project 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 DAI Chief of Party as a result of such inspection.

8. Compliance with Terms and Conditions

8.1 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 Representations and Certifications of Compliance listed in Attachment G.

8.2 Prohibited Technology

Bidders MUST NOT provide any goods and/or services that utilize telecommunications and video surveillance products from the following companies: Huawei Technologies Company, ZTE Corporation, Hytera Communications Corporation, Hangzhou Hikvision Digital Technology Company, or Dahua Technology Company, or any subsidiary or affiliate thereof, in compliance with FAR 52.204-25.

8.3 Source and Nationality

Under the authorized geographic code for its contract DAI may only procure goods and services from the following countries.

Geographic Code 937: Goods and services from the United States, the cooperating country, and

"Developing Countries" other than "Advanced Developing Countries: excluding prohibited countries. A

list of the "Developing Countries" as well as "Advanced Developing Countries" can be found at:

http://www.usaid.gov/policy/ads/300/310maa.pdf and

http://www.usaid.gov/policy/ads/300/310mab.pdf respectively.

DAI must verify the source and nationality of goods and services and ensure (to the fullest extent possible) that DAI does not procure any goods or services from prohibited countries listed by the Office of Foreign Assets Control (OFAC) as sanctioned countries. OFAC sanctioned countries may be searched within the System for Award Management (SAM) at www.SAM.gov. The current list of countries under comprehensive sanctions include: Cuba, Iran, North Korea, Sudan, and Syria. Goods may not transit through or be assembled in comprehensive sanctioned origin or nationality countries nor can the vendor be owned or controlled by a prohibited country. DAI is prohibited from facilitating any transaction by a third party if that transaction would be prohibited if performed by DAI.

By submitting a proposal in response to this RFP, Offerors confirm that they are not violating the Source and Nationality requirements of the goods or services being offered and that the goods and services comply with the Geographic Code and the exclusions for prohibited countries outlined above.

8.4 Unique Entity ID (SAM)

There is a **mandatory** requirement for your organization to provide a Unique Entity ID (SAM) to DAI. Without a Unique Entity ID (SAM), DAI cannot deem an Offeror "responsible" to conduct business with and therefore, DAI will not enter into a subcontract/purchase order or monetary agreement with any organization. The determination of a successful offeror/applicant resulting from this RFP/RFQ/RFA is contingent upon the winner providing a Unique Entity ID (SAM) to DAI. Offerors who fail to provide Unique Entity ID (SAM)will not receive an award and DAI will select an alternate Offeror.

All U.S. and foreign organizations which receive first-tier subcontracts/ purchase orders with a value of $30,000 and above **are required** to obtain a Unique Entity ID (SAM)prior to signing of the agreement. Organizations are exempt from this requirement if the gross income received from all sources in the previous tax year was under $300,000. DAI requires that Offerors sign the self-certification statement if the Offeror claims exemption for this reason.

For those required to obtain a Unique Entity ID (SAM), see Attachment D - Instructions for Obtaining a Unique Entity ID (SAM)- DAI'S Vendors, Subcontractors

For those not required to obtain a Unique Entity ID (SAM), see Attachment E: Self Certification for Exemption from Unique Entity ID (SAM)Requirement

9. Anti-Corruption and Anti-Bribery Policy and Reporting Responsibilities

DAI conducts business under the strictest ethical standards to assure fairness in competition, reasonable prices and successful performance or delivery of quality goods and equipment. **DAI does not tolerate the following acts of corruption:**

- Any requests for a bribe, kickback, facilitation payment or gratuity in the form of payment, gift or special consideration by a DAI employee, Government official, or their representatives, to influence an award or approval decision.
- Any offer of a bribe, kickback, facilitation payment or gratuity in the form of payment, gift or special consideration by an offeror or subcontractor to influence an award or approval decision.
- Any fraud, such as mis-stating or withholding information to benefit the offeror or subcontractor.
- Any collusion or conflicts of interest in which a DAI employee, consultant, or representative has a business or personal relationship with a principal or owner of the offeror or subcontractor that may appear to unfairly favor the offeror or subcontractor. Subcontractors must also avoid collusion or conflicts of interest in their procurements from vendors. Any such relationship must be disclosed immediately to DAI management for review and appropriate action, including possible exclusion from award.

These acts of corruption are not tolerated and may result in serious consequences, including termination of the award and possible suspension and debarment by the U.S. Government, excluding the offeror or subcontractor from participating in future U.S. Government business.

Any attempted or actual corruption should be reported immediately by either the offeror, subcontractor or DAI staff to:

- Toll-free Ethics and Compliance Anonymous Hotline at (U.S.) +1-503-597-4328
- Hotline website – www.DAI.ethicspoint.com, or
- Email to Ethics@DAI.com
- USAID's Office of the Inspector General Hotline at hotline@usaid.gov.

By signing this proposal, the offeror confirms adherence to this standard and ensures that no attempts shall be made to influence DAI or Government staff through bribes, gratuities, facilitation payments, kickbacks or fraud. The offeror also acknowledges that violation of this policy may result in termination, repayment of funds disallowed by the corrupt actions and possible suspension and debarment by the U.S. Government.

10. Attachments

10.1 Attachment A: Scope of Work for Services or Technical Specifications

USAID Skills for Employment Project
CONSULTANCY FOR THE DEVELOPMENT OF A MONITORING, EVALUATION AND LEARNING (MEL) SOFTWARE

A. BACKGROUND AND JUSTIFICATION

The Skills for Employment Project (SEP) is a project funded by the United States Agency for International Development (USAID), which has been awarded to DAI Global, LLC (DAI).

SEP seeks to address the challenges that prevent young people, women, potential and returning migrants, LGBTI people and people with disabilities from accessing decent employment by equipping these groups with the skills and resources they need to become more resilient and productive members of society, and less likely to migrate.

In addition, SEP will act as a facilitator by building local capacity and strengthening linkages between stakeholders, enabling them to jointly design and implement solutions through a facilitative systems-strengthening approach to workforce development.

This project will enable Salvadoran organizations to lead and sustain systemic change through the following 3 objectives:

i. Increase the participation of the private sector to improve the enabling environment for employment.
ii. Improve the relevance and quality of the curriculum for Salvadoran migrants, returnees, and vulnerable populations in order to achieve employment or complete their secondary education.
iii. Increased institutional capacity of training and educational service providers for labor market insertion, including comprehensive support for vulnerable populations.

SEP's theory of change is as follows: IF private sector engagement (PSE) is increased when it is incentivized to hire and understand the contribution of Salvadoran youth to its workforce, and when the institutional capacity of local organizations in job placement and comprehensive support for these youth is strengthened, and when the relevance and quality of curricula is improved to align with the needs and demands of the labor market, THEN local institutions will significantly and sustainably improve training and job placement outcomes for Salvadoran youth and potential migrants, which will, in effect, help prevent and reduce irregular migration.

SEP adopted a Monitoring, Evaluation and Learning Plan (MELP) that delineates the approaches, mechanisms and tools to ensure the achievement of expected results, fostering learning through evidence, valuing the importance of collaboration and communication among key stakeholders. The MELP aims to monitor, measure and report on the progress of activities to achieve the objectives, as well as foster learning through a solid technical evidence base that will contribute to informed decision making to seize opportunities, scale up impact and help communicate SEP's achievements in the 73 prioritized municipalities.

DAI Global, LLC, invites qualified offerors to submit proposals to implement and deliver a customized Customer Relationship Management (CRM) based Monitoring and Evaluation system for the Skills for Employment Project. The successful offeror will implement a sustainable, scalable and resilient solution that builds on the core needs of the Skills for Employment Project. The solution will enable project staff to track and report on indicator data under the USAID Agreement over time.

The solution will be owned by DAI Global, LLC, and the front-end user experience and all training must be in Spanish; therefore, even if the official language of the company and its developers is English or another language, it is of vital importance for this consultancy that there is a point of contact for technical coordination that acts as a counterpart to interact in Spanish.

The project will have a core set of users, in addition to the implementing partners, who will be primarily responsible for entering data on direct and indirect beneficiaries into the project.

The data entered into the system will include information about participants needed for aggregate reporting (e.g., gender, age, organization, and country), but also personal information, such as national identification number and other information that, when combined, could be used to identify someone, such as full name, address, telephone number, and e-mail address.

DAI will provide a list of fields that are considered personal identification information for the purpose of removing this information from aggregated reports that do not require it and when data is exported to external systems. The list will be reviewed and finalized as part of the review of system requirements after contract award.

The winning offeror will provide the necessary professional services to implement the scope of work in the Microsoft Dynamics CRM Online framework adjusting to the MEL needs of the Skills for Employment Project and DAI infrastructure, cloud environment—Azure, SQL database engine and data visualization in Power BI.

The offeror's quotation shall reflect the detailed cost of software licenses required for the development of the CRM system and functionality. The implementation schedule in this document assumes that MS Dynamics CRM Online will be configured, customized and/or extended as necessary to meet the functional requirements.

The Skills for Employment technical staff and the Monitoring, Evaluation and Learning area will be the only ones empowered to generate reports that include aggregated and implementation-related information on all grantees and their beneficiaries. However, the system should allow for the creation of specific users so that each implementing partner can be able to generate aggregated reports of its own activities and its beneficiaries, e.g., youth, over a period of time.

B. GENERAL OBJECTIVE

The purpose of the consultancy is to design and develop a customized Monitoring, Evaluation and Learning (MEL) computer system, adjusting to the needs of MEL and DAI's infrastructure, based on the CRM Microsoft Dynamics 365 framework[2] and data visualization in Microsoft Power BI, in such a way that it allows the loading of databases, creation of report modules and graphic visualization for the monitoring and follow-up of SEP's Monitoring, Evaluation and Learning Plan (MELP) indicators.

C. SCOPE OF WORK

This system must allow the loading and processing of databases, creation of report modules and graphic visualization for the monitoring and follow-up of SEP's MELP indicators. This system must allow the consultation and exploration of information associated with SEP activities, as well as the repository of information and uploading of backup information from its counterparts in accordance with the guidelines of the Monitoring, Evaluation and Learning (MEL) area.

Among the main functionalities of the MEL system are:

- Direct data entry[3] into the platform, or by importing existing data from DAI Collect[4] or Excel files by implementing partners.
- Generation of numerical reports and dashboards[5] aggregated by module and individually by implementing partner, based on the data collected through the platform, according to specific requirements defined by SEP and its MELP.[6]
- Generation of balanced scorecards by implementing partner and overall project based on the programming of its specific goals and progress in quarterly, annual and global execution, which allows managing the technical, financial, administrative and MEL follow-up of the grants. The module must allow to compile the progress in the activities implemented by the grants and must be able to produce visual outputs in dashboard format through the Microsoft Dynamics or Power BI platform.
- Internal messaging on the platform for monitoring and validation of the information entered, according to the workflow defined, allowing notification via alerts and/or e-mail for review and/or correction of the data to the implementing partners, Technical Team or MEL.

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[2] Based on the experience of Bridges to Employment and its SIS-Puentes monitoring system, it is feasible to use Microsoft Dynamics 365 for the development of a CRM-based monitoring system. Notwithstanding this, an initial phase of this consultancy should include a preliminary study on the feasibility of using Microsoft Dynamics to develop this new system according to the stipulations of these TOR; otherwise, the contracted company should propose the use of another tool tailored to the objectives of the system and SEP will evaluate its feasibility and suitability

[3] Record of beneficiaries (direct and indirect), attendance records, training centers, courses given, records of stipend amounts, leverage amounts, partnerships established, infrastructure improvements, follow-up of new jobs, perception of improvement and continuity in higher education, etc.

[4] To streamline data collection, management and analysis, DAI hosts and manages an enterprise-wide data collection platform. Known as DAI Collect, DAI uses KoboToolbox open source data collection software, one of the most recognized open source mobile data collection tools available today. Kobo's open source code is deployed on DAI servers, enabling secure storage of project data within a company-managed cloud environment. DAI Collect serves as the portal of entry for the data collection needs of DAI projects.

[5] Generated in the same platform of Microsoft Dynamics 365 or with Power BI.

[6] Although data uploading and reporting by implementing partners is expected to occur on a monthly basis, reports should be generated automatically using the data available to date.

D. ACTIVITIES/DETAILED REQUIREMENTS

The development of the system involves the following:

Activity 1: Periodic meetings for coordination and socialization of the expected scope of each of the products of this consultancy, specifications of the requirements, times, development levels, etc. These meetings may be virtual or face-to-face, as agreed by the parties according to the need or the topics to be developed.

Activity 2: The definition of a data model and system workflow that allows user administration and differentiated access through credentials and login/editing roles for various system screens and includes all the indicators established in the MELP Plan and those defined by the SEP Technical Team as necessary for monitoring the intervention.

Activity 3: Configure CRM and perform configurations and customization for core modules with at least information on direct and indirect beneficiaries, events, training centers, technical, life skills or other courses, participant records, attendance records, stipend records, leverage records, policy/practice changes, enhancements/strengthening, memoranda of understanding, pre- and post-diagnostic results, placement tracking records, perceived improvements in employment and continuity in higher education, grant expenditures, certifications/accreditations, MEL repository with MELP, indicator sheets, grant Balanced Scorecard, overall project reports and reports to USAID with their specific templates.

Activity 4: Design of templates and forms in Spanish for direct information entry through 1) the system platform and 2) via DAI Collect or 3) Excel files, allowing the attachment of backup documents in Excel, Word or PDF format. These templates should incorporate all the necessary elements to collect the information related to the MELP indicators, the individual plans of each implementing partner and the implementation reports requested by USAID (quarterly report, PPR, etc.).

Activity 5: Creation of the database structure and its corresponding glossary.

Activity 6: Upload and cleanup[7] of all technical implementation information existing at the date of delivery of the final version of the MEL System, according to its designed structure. This will include progress data on indicators for each of the implementing partners, participant records, supporting documents, forms per participant, among others.

Activity 7: Implement a workflow process to verify that the information submitted is consistent with what is entered/uploaded into the system, allowing the person responsible for the information (implementing partners) to be notified when a revision and/or correction of the data is required.

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[7] Data cleanup, an essential process for database preparation, consists of identifying and correcting errors, eliminating duplicate, irrelevant or inconsistent data, and ensuring that data is consistent, structured and accurate. This process is fundamental to generating accurate visualizations and analyzing them. A common example of this is having a duplicate record in the database, which is the same name spelled in different ways: Sofia Hernandez and sofia hernandez.

Activity 8: Design of dashboards (or graphic representation) for each of the modules in the system and a general control chart of the project's progress according to the indicators established in the MELP. These dashboards should be done in Power BI, and should include quantitative, qualitative and geo-referenced information. In addition, they must be designed to be accessed and displayed properly depending on whether it is from the MEL system platform itself, from the Project's SharePoint hosted in DAI or from mobile devices (e.g., tablets and/or cell phones).

Activity 9: Linking of the databases of each of the system's dashboards, and development and implementation of an automatic and periodic data update mechanism.

Activity 10: Repository of data and documentation related to indicators and measurement: SEP MEL Plan, MEL Plans of each partner, Performance Indicator Reference Sheet (PIRS), backup and verifiable information, etc.

Activity 11: Design and deliver operation manuals, as well as deliver the source code of the MEL system and guarantee that the system and code will not be replicated, which will be the intellectual property of DAI Global LLC.

Activity 12: Creation and implementation of the different user profiles (implementing partners, SEP project team, USAID counterpart, or others).

Activity 13: Train the different users of the CRM according to user groups (implementing partners, SEP project team, USAID counterpart, or others) and ensure that they understand how their data collection responsibilities fit into the overall scheme of the system.

Activity 14: Generate files that conform to the DIS system - USAID Platform for Implementer tracking.

Activity 15: Provide a guarantee of technical support after the delivery of the MEL software for a minimum follow-up period of 6 months, time that will be dedicated to the incorporation of adjustments, system calibration and / or resolve doubts of the SEP project team. At the end of this period, an activity report must be submitted describing the technical support after delivery of the final version of the MEL system software.

Activity 16: Design branding proposal, logo and visual and graphic standardization of all modules and tools of the MEL System.

E. USEFUL REFERENCES TO THE CONSULTING COMPANY: (when applicable)

A technical and financial proposal **in Spanish** as detailed in Section R. Proposal Composition shall be submitted for the consultancy.

A cover letter must also be included, together with the proposal, all submitted on the offeror's company letterhead with a duly authorized signature, and a company seal/stamp using the template provided in Attachment B.

F. DELIVERABLES/PRODUCTS

Deliverable/Product 1: Work plan, timeline and definition of main functionalities of the MEL system software.

- Work plan, schedule of activities and deliverables including platform design, development, testing and maintenance.
- Document with the definition of the main functionalities that are mandatory and minimum for a viable product, which will include the consultant's recommendations on the most appropriate functionalities, software and applications that can be implemented within the framework of the system's objectives, all of which will be defined jointly with SEP's Technical Team, MEL and IT.

Time frame: 30 calendar days from the date of signature of the Firm Fixed Price Subcontract.

Deliverable/Product 2: Custom software design and development adjusting to the needs of MEL-SEP and DAI infrastructure, cloud environment—Azure, SQL database engine and data visualization in Power BI.

✓ Product Development Report 2, minimally detailing the completion of the following processes:

- Functional demo version for user test acceptance with the following key functionalities:

    4. Interface designed and operating with the minimum modules for information entry by the implementing partners.
    5. Direct data entry into the platform, or by importing existing data from DAI Collect or Excel files by implementing partners.
    6. Generation of numerical reports and dashboards aggregated by module and individual by implementing partner, from the data collected through the platform, according to specific requirements defined by SEP and its MELP.[8]

- CRM configurations and customization for the main modules of the system.
- Database model and validations.
- User testing.
- Functional version for user test acceptance.

Time frame: 60 calendar days from the approval of the first deliverable/product.

Deliverable/Product 3: Final version of the MEL system software.

[8] Although data uploading and reporting by implementing partners is expected to occur on a monthly basis, reports should be generated automatically using the data available to date.

- ✓ Product Development Report 3, minimally detailing the completion of the following processes:

  - Final version of the MEL System, including the remaining functionalities (in quality and production environment):

    3. Generation of balanced scorecards by implementing partner and overall project, based on the programming of its specific goals and progress in execution by quarter, year and overall, to manage the technical, financial, administrative and MEL monitoring of the grants. The module must allow to compile the progress in the activities implemented by the grants and must have the capacity to produce visual outputs in dashboard format through the Microsoft Dynamics or Power BI platform.
    4. Internal messaging on the platform for monitoring and validation of the information entered, according to the workflow defined, allowing notification via alerts and/or e-mail for review and/or correction of the data to the implementing partners, Technical Team or MEL.

  - Delivery of the Source Code, guaranteeing that the system will not be replicated, nor the code, which will be the intellectual property of DAI Global LLC.
  - User testing of the system in production.
  - Support plan—delivery to the MEL and IT team of operation manuals and training in the operation of the system.
  - Design and delivery of operating manuals.
  - Training on system operation and interface for the SEP team and at least 1 for each SEP implementing partner.
  - Upload and cleanup of all technical implementation information existing at the date of delivery of the final version of the MEL System, according to the structure designed for the MEL System. This will include progress data on indicators for each of the implementing partners, participant records, supporting documents, forms per participant, among others.

Time frame: 60 calendar days from the approval of the second deliverable/product.

Deliverable/Product 4: Development, implementation and testing of the application for registration of participants in SEP activities.

- ✓ Product Development Report 4, minimally detailing the completion of the following processes:
  - Consolidated report on the design, development and implementation of the Monitoring System (Final Report).
  - PPT including highlights of the system design and development, obstacles and recommendations for improvement.
  - Templates for submitting comments on the operation of the system after its delivery and that will serve as a guide for subsequent technical support.
  - Consolidation and systematization of observations on system performance.
  - Post-development system remediation reporting and implementation process.

At the end of the delivery of this product will enter into force the warranty period of 6 months that will be dedicated to the implementation of adjustments and calibration of the system. After these 6 months, a report will be delivered detailing the technical support provided and the corrections made during this period.

Time frame: 45 calendar days from approval of the third deliverable/product.

G. HOW TO PRESENT DELIVERABLES/PRODUCTS:

The products must be delivered in digital format and two copies in printed format.

The structure should include at least:
Introduction
Glossary
Body of the document: Development according to the specifications requested for each product
Conclusions and recommendations

In addition, together with the delivery of each product report, a presentation of its development and main results must be made to the SEP Technical Team and a PPT must be provided with a summary of the report.

H. DELIVERY DETAILS/ PAYMENT SCHEDULE:

a. **First payment** corresponding to 15% of the total amount of the Purchase Order against delivery of **Product 1: Work plan, schedule, and definition of main functionalities of the MEL system software** and the written document confirming that the service was performed acceptably.

b. **Second Payment,** corresponding to 30% of the total amount of the Purchase Order against delivery of **Product 2: Design and development of custom software, adjusting to the needs of MEL-SEP and DAI infrastructure, cloud environment-Azure, SQL database engine and data visualization in Power BI** and of the written document confirming that the service was performed acceptably.

c. **Third Payment,** corresponding to 30% of the total amount of the Purchase Order against delivery of **Product 3: Final version of the MEL system software** and of the written document confirming that the service was acceptably performed.

d. **Fourth Payment** corresponding to 25% of the total amount of the Purchase Order upon delivery of **Product 4: Development, implementation and testing of the application for registration of participants in SEP activities** and the written document confirming that the service was performed acceptably.

I. TECHNICAL DIRECTION

The person(s) designated by the company will be in constant communication with the Deputy Chief of Party-Technical and the Director of Monitoring, Evaluation and Learning of the SEP project, who are responsible for the implementation of the Monitoring and Evaluation System. In addition, the Monitoring, Evaluation and Learning Specialist and the IT Specialist will provide technical support.

Any communication regarding the technical progress, obstacles and achievements of this consultancy should be addressed to the above mentioned.

J. SPECIAL CONSIDERATIONS (when applicable)

Within their technical proposals, offerors must also explicitly include the following:

- A warranty period of at least 6 months, covering minor fixes related to configuration, customization or extended features implemented by the winning offeror.
- Best practice recommendations for managing the CRM, including user account management, license renewal, and data backup management in a cloud-based system.
- In-person and, potentially, remote training should be provided. Either directly or through a local partner, at least one member of the successful offeror's staff must be involved in conducting the training in person and in Spanish. Training manuals will be provided and will include, at a minimum, a training plan along with its outline and PPT of what will be covered in each training session.
- The user interface, reports and all user experience features must be available in Spanish. Therefore, the main technical coordination must be permanently available in Spanish.

K. IMPLEMENTATION TERM

The Skills for Employment Project estimates that the duration of the consultancy will be 1 year. This period includes developing the system, which should be carried out in the first 180 calendar days (6 months). Additionally, a period of no more than 180 calendar days (6 months) of technical support is foreseen after the delivery of the Monitoring, Evaluation and Learning software, time that will be dedicated to implement adjustments, calibrate the system and/or resolve doubts from the MEL team.

L. THE PROFILE OF THE CONSULTING FIRM

SEP seeks the services of a consulting firm with experience in CRM customizations, design and structuring of Planning and/or Monitoring and Evaluation software, database structuring, automated connections with primary and secondary sources, as well as automated reporting.

The firm selected shall ensure that the proposed developers, in accordance with its implementation plan, possess at least five (5) years of experience in database analysis, design and structuring, especially in SQL in a Microsoft environment with cloud environments; experience in generating web reporting and experience in Fulcrum, Kobotoolbox and/or similar database connection. Profiles that exceed the proposed characteristics are desirable.

Because the solution will be owned by DAI Global, LLC, and the front-end user experience and all training must be in Spanish, therefore, although the official language of the company and its developers is English or another language, it is of vital importance for this consultancy that there is a technical coordination as a counterpart in Spanish.

The selected company or organization must guarantee:

- Having **General Experience** in consultancies related to:
    - Development of relational database management systems and business intelligence tools for organizations.
    - Proven experience or a portfolio of previous work in a Microsoft environment with cloud environments.
    - Desirable previous experience working with international cooperation projects, especially USAID implementers.
- Having **specific verifiable experience** in:
    - At least 5 consultancies or a portfolio on topics related to the design and implementation of relational database management systems that leverage disparate data sets, data connectivity, data reporting and visualization in support of business analysis and decision making.
    - At least 5 years in IT and software development.
    - Proven experience or a portfolio of previous work in CMR Dynamics 365 customization.
    - Verifiable experience or a portfolio in design and structuring of Planning and/or Monitoring and Evaluation software.
    - Experience in web reporting and experience in database connection to Fulcrum, Kobotoolbox and/or similar databases.

The company must have an experienced work team to produce the different products with the required quality within the established deadlines and must have at least one technical coordinator in Spanish. The number of people in the team is not a restriction, being a priority that the team is able to successfully complete all the assigned tasks.

A coordinator:

- With an **academic background** in Systems engineering or related professions.
    - Minimum 5 years of experience as a developer in all stages of the development chain, from back-end to front-end.
    - Preferably with a Master's degree specialized in software development.
    - Fluency in Spanish language.

- At least 5 years of **professional experience** performing IT solutions coordination functions, specifically related to the design and implementation of relational database management systems that leverage disparate data source sets, data connectivity, data reporting and visualization in support of business analysis and decision making.

Technical Team:

- With specific experience in consulting on issues related to:
  - Application development in web environment (using XML, HTML, JavaScript, CSS, web services) and object-oriented programming (e.g., NET/C#, ASP.NET, Java, Visual Studio, .NET Core, plugins, workflow activities).
  - Experience in Front-End development Frameworks (e.g., React, Angular)
  - Advanced knowledge and experience with Dynamics 365 suite applications, especially Dynamics 365 Customer Engagement (CRM).
  - Power BI experience: extracting data from different sources, data modeling, creating reports and dashboards.
  - Experience with relational databases (e.g., Microsoft SQL server).
  - Experience with API development and integration using .Net/C# or similar.
  - Experience with common database solutions (design and build) (PostgreSQL, SQL Server, MySQL, etc.).

- Desirable:
  - Knowledge of containerized infrastructure development (Docker/Kubernetes).
  - Knowledge of DevOps processes, including CI/CD.
  - Knowledge of agile software development processes.
  - Knowledge of Azure DevOps, Power Platform, Azure Portal.
  - Knowledge of microservices oriented applications.
  - Experience working with international cooperation projects, especially USAID.
  - At least one technical counterpart fluent in Spanish.

Note: The consulting firm must attach the firm's cover letter detailing its experience, and also attach the resumes of the proposed team containing the experience related to the consultancy (no more than 2 pages per résumé plus corresponding attestations).

M. EVALUATION CRITERIA

	ASPECTS TO BE EVALUATED IN THE PROPOSAL FOR THE CONSULTANCY	**Score**
	1. Experience of the consulting firm	**25**
1.1	**With verifiable general experience in consultancies related to:**	**10**
	The development of relational database management systems and business intelligence tools for organizations.	**4**
	More than 10 years of experience	4
	Between 5 and 10 years of experience	3
	Less than 5 years of experience	1

	Proven experience or a portfolio of previous work in a Microsoft environment with cloud environments.	**4**
	More than 5 years of experience	4
	4 to 5 years of experience	3
	Less than 3 years of experience	1
	Previous experience working with international cooperation projects, especially USAID implementers.	**2**
	4 to 5 years of experience	2
	Less than 3 years of experience	1
1.2	**With specific verifiable experience in:**	**15**
	Consulting or a portfolio on topics related to the design and implementation of relational database management systems that leverage disparate data sets, data connectivity, data reporting and visualization in support of business analysis and decision making.	**3**
	More than 5 consultancies of experience	3
	Between 4 to 5 consultancies of experience	2
	Less than 3 consultancies of experience	1
	Experience in IT and software development	**3**
	More than 5 years of experience	3
	4 to 5 years of experience	2
	Less than 3 years of experience	1
	Proven experience or a portfolio of previous work in CMR Dynamics 365 customization	**3**
	More than 5 years of experience	3
	4 to 5 years of experience	2
	Less than 3 years of experience	1
	Proven experience or a portfolio in designing and structuring Planning and/or Monitoring and Evaluation software	**3**
	More than 5 years of experience	3
	4 to 5 years of experience	2
	Less than 3 years of experience	1
	Experience in web reporting and experience in database connection to Fulcrum, Kobotoolbox and/or similar	**3**

	More than 5 years of experience	3
	4 to 5 years of experience	2
	Less than 3 years of experience	1
	2. Training and Experience of the Consulting Team	**35**
2.1	**The Coordinator**	**13**
	With an **academic background** in Systems Engineering or related professions.	**3**
	Minimum 5 years of experience as a developer in all stages of the chain, from back-end to front-end.	**3**
	Preferably a master's degree specialized in software development.	**2**
	Proficiency in Spanish	**2**
	At least 5 years of **professional experience** in IT Solutions Coordination roles, specifically related to the design and implementation of relational database management systems that leverage disparate data sets, data connectivity, data reporting and visualization in support of business analysis and decision making.	**3**
	More than 5 years of experience	3
	4 to 5 years of experience	2
	Less than 3 years of experience	0
2.2	**Technical Team:**	**22**
	With **specific experience** in consulting on issues related to:	**15**
	Application development in web environment (using XML, HTML, JavaScript, CSS, web services) and object-oriented programming (e.g.: NET/C#, ASP.NET, Java, Visual Studio, .NET Core, plugins, workflow activities)	2
	Experience in Front-End development frameworks (e.g., React, Angular)	2
	Advanced knowledge and experience with Dynamics 365 suite applications, especially Dynamics 365 Customer Engagement (CRM).	3
	Power BI experience: data extraction from different sources, data modeling, report and dashboard creation.	2
	Experience with relational databases (e.g., Microsoft SQL server)	2
	Experience in API development and integration using .Net/C# or similar.	2
	Experience with common database solutions (design and build) (PostgreSQL, SQL Server, MySQL, etc.)	2
	Desirable experience:	**7**

	Knowledge of development for containerized infrastructure (Docker/Kubernetes)	1
	Knowledge of DevOps processes, including CI/CD	1
	Knowledge of agile software development processes.	1
	Knowledge of Azure DevOps, Power Platform, Azure Portal	1
	Knowledge of microservices-oriented applications	1
	Experience working with international cooperation projects, especially USAID.	1
	At least one technical counterpart proficient in Spanish language	1
	3. Methodology, technical approach	**40**
3.1	**Clarity and conceptual and technical soundness of the proposal.**	**5**
	Analysis of the approach, methods, areas of work and planned activities and their consistency and technical soundness	5
3.2	**Fulfillment of objectives and products**	**15**
	The proposed objectives and products are largely in line with the requirements of the TOR and the proposal presents an innovative component that enriches the work to be carried out.	15
	The proposed objectives and outputs are largely in line with the requirements of the TOR.	10
3.3	**The proposed methodology expresses knowledge of the work's implementation stages and components**	**10**
3.4	**Structure of the technical proposal**	**5**
	Contains all the activities requested in the TOR and incorporates the basic structure requested in Annex A.	5
	Contains the activities requested in the TOR.	4
3.5	**Provides enough detail to differentiate its approach from others**	**4**
3.6	**Details the scope of the technical support and assistance to be provided as a warranty after 6 months of delivery of the system**	**1**
	Evaluation total	**100**

N. PROJECT RESPONSIBILITY (where applicable)

The Skills for Employment Project will provide the relevant documentation to perform the work requested in this consultancy, including contextual information about the project; the SEP Monitoring, Evaluation and Learning Plan (MELP); the individual monitoring plans of the implementing partners; databases relevant to the System, among others.

Likewise, SEP will facilitate and provide permissions and access to the different internal platforms available for the development of the Monitoring and Evaluation software, such as DAI Collect, SharePoint, among others.

O. CONFIDENTIALITY

The works generated by the consultancy are the sole and exclusive property of the USAID Skills for Employment Project, being prohibited any type of reproduction, publication, dissertation, public disclosure or with third parties by any verbal, audio visual and/or written means of the material from the provision of its services.

P. AWARD

The offeror who obtains the highest score over the requirements established in the evaluation criteria will be selected, provided that the offered price is reasonable.

Q. CRITERIA FOR DISQUALIFYING A PROPOSAL

All participating companies should consider that the Skills for Employment Project, through these Terms of Reference, reserves the options to disqualify or not consider a proposal (even if it has been chosen as a winner) if the following criteria are violated:

a) When the documents are incomplete, that is to say that any of the requested annexes or certifications have been omitted, or any of these are improperly submitted. Likewise, if they are not submitted according to the established formats.
b) Submitting false information or information that cannot be verified; therefore, all contact or verification information requested in the attached forms must be established.
c) Failure to submit certificates and corresponding documentation when selected as the awarded firm for the project.
d) Having any degree of kinship with any member of the evaluation committee or having a conflict of interest with the project.
e) The company and any or all of the candidates presented are related to any judicial process for violation of the laws of El Salvador.

R. PROPOSAL COMPOSITION

Proposal Composition: Your organization's technical proposal must comprise the two parts of the submission documents described below: 1) Technical Proposal and 2) Financial Proposal. The Technical Proposal and the Economic Proposal must be prepared in Spanish as separate files for independent evaluation and included as separate attachments in your email submission. Technical Proposals should be no more than ten (10) pages in length, not including the cover page or attachments such as cover letter, list of references, résumés, graphs, charts, tables, or certificates. The technical proposals must use a standard 11-point font with margins of at least one inch and must be sent in Word format. Financial proposals should be submitted in Excel format—not PDF or Word—with formulas shown. The proposal should be accompanied with budget notes included, either within the Excel document, or in a Word format. The budget notes should provide cost descriptions to justify the reasonableness and necessity of the proposed costs.

Part 1 – Technical Proposal: The technical proposal must consist of at least the following sections:

1. **Technical Approach** - Description of proposed services that meet or exceed 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 achievement of timely and acceptable performance of the work.
2. **Management Approach** - Description of the Offeror's personnel assigned to the project. The proposal must describe how the proposed team members have the necessary experience and capabilities to carry out the Technical Approach. The proposal should also describe how and when the Offeror intends to complete each task and activity, the implementation tasks, and preliminary/final deliverables, for review and/or approval. A tentative schedule including at least the development of the macro-activities detailed in the TORs must be provided with the proposal.
3. **Past performance**: Provide a list three recent consulting or experience with a scope and duration reasonably similar to that requested in these TOR. The information shall be provided in tabular form and shall include the legal name and address of the organization for which the services were provided, a description of the work performed, the duration of the work and value of the contract, a description of the problems encountered and how they were resolved, and a current contact telephone number of a responsible and knowledgeable representative of the organization.
4. **Value(s) added by your company/organization:** Explain how your company / organization will generate added value to the design and structuring of the database. Provide examples of how such added value has been delivered in other work of a similar nature.
5. **Equipment and Technology:** Describe in this section the technological resources/equipment you will make use of according to your technical proposal.

6. **Handling of Sensitive / Confidential Information:** Describe what effective practices your company/organization has observed in previous similar work to safeguard the contracting entity's data, information and duties. Also describe how you have influenced your work teams to understand the sensitivity of the information and the necessary safeguards for confidentiality as a responsibility. What measures would you propose for the construction and operation of a database for the Skills for Employment Project.

7. **Scope of the accompaniment and technical support to be provided as a guarantee after 6 months of delivering the system:** Describe how you will develop subsequent technical support and the scope of such support.

Part 2 – Financial proposal: The financial proposal will be deliverables-based. However, Offerors must include a detailed breakdown of individual costs to evaluate the total proposed price. This should include hourly rates for proposed personnel, level of effort, transportation, travel expenses (where applicable), applicable overhead rates, and other direct related costs to accomplish the scope of work of these TOR. The financial proposal will be reviewed for cost reasonableness, cost effectiveness and necessity against the offeror's technical proposal. Please use the template provided in Attachment C: Price Schedule.

Offerors must clearly describe what equipment they will use, compatible with the use of Microsoft Azure licenses, for the implementation of the activities related to this work.

Evaluation Process: DAI will evaluate proposals received using a two-step process. Step one is the submission of a technical proposal, not to exceed 10 pages, along with an economic proposal to be submitted separately. DAI will evaluate the technical proposals using a scoring system, reviewed by a technical evaluation committee, and will review the corresponding budgets only for technical proposals that receive a technical score above 70 points.

10.2 Attachment B: Proposal Cover Letter

COVER LETTER

[Instruction: to issue on letterhead]

Dear DAI/Employment Skills Project:

We, the undersigned, offer the attached proposal in response to the Request for Proposals for the CONSULTANCY FOR THE DEVELOPMENT OF MONITORING, EVALUATION AND LEARNING SOFTWARE—MEL—issued on **[insert date]**. Our proposal meets the technical requirements provided as Annex A and is for the total price of **[insert price]** (letters and numbers). We certify a price validity period of **90** days. Our quotation shall be binding upon us, subject to modification.

We have read and fully understand the instructions provided in the RFP in question and intend to comply in their entirety.

We understand that DAI Global LLC/Skills for Employment Project is not bound to accept any proposals received and will not reimburse any costs associated with the preparation of this quotation.

Name of Legal Representative:
Position of the Legal Representative:
Name of Company:
Address:
Telephone:
E-mail:

____

Authorized signature: **Seal**:

10.3 Attachment C: Price Schedule (Excel Format)

Attached

10.4 Attachment D: Instructions for Obtaining an Unique Entity ID (SAM)Number - DAI'S Vendors, Subcontractors

INSTRUCTIONS FOR OBTAINING AN Unique Entity ID (SAM) DAI'S VENDORS, SUBCONTRACTORS & GRANTEES

Note: There is a Mandatory Requirement for your Organization to Provide an Unique Entity ID (SAM) to DAI

I. SUBCONTRACTS/PURCHASE ORDERS: All domestic and foreign organizations which receive first-tier subcontracts/ purchase orders with a value of $30,000 and above are required to obtain an Unique Entity ID (SAM) prior to signing of the agreement. *Your organization is exempt from this requirement if the gross income received from all sources in the previous tax year was under $300,000. Please see the self-certification form attached.*

II. MONETARY GRANTS: All foreign entities receiving first-tier monetary grants (standard, simplified and FOGs) with a value equal to or over $25,000 and performing work outside the U.S. must obtain an Unique Entity ID (SAM) prior to signing of the grant. All U.S. organizations who are recipients of first-tier monetary grants of any value are required to obtain an Unique Entity ID (SAM); the exemption for under $25,000 applies to foreign organizations only.

NO SUBCONTRACTS/POs ($30,000 + above) or MONETARY GRANTS WILL BE SIGNED BY DAI WITHOUT PRIOR RECEIPT OF AN UNIQUE ENTITY ID (SAM).

Note: The determination of a successful offeror/applicant resulting from this RFP/RFQ/RFA is contingent upon the winner providing an Unique Entity ID (SAM)to DAI. Organizations who fail to provide an Unique Entity ID (SAM) will not receive an award and DAI will select an alternate vendor/subcontractor/grantee.

Background:

Summary of Current U.S. Government Requirements - Unique Entity ID (SAM)

Effective April 4, 2022, entities doing business with the federal government will use the Unique Entity Identifier (SAM) created in SAM.gov. The Unique Entity ID (SAM) is a 12-character alphanumeric value managed, granted, and owned by the government. This allows the government to streamline the entity identification and validation process, making it easier and less burdensome for entities to do business with the federal government.

Entities are assigned an identifier during registration or one can be requested at SAM.gov without needing to register. Ernst and Young provides the validation services for the U.S. Government. The information required for getting an Unique Entity ID (SAM) without registration is minimal. It only validates your organization's legal business name and address. It is a verification that your organization is what you say it is.

The Unique Entity ID (SAM) does not expire.

Summary of Previous U.S. Government Requirements – DUNS

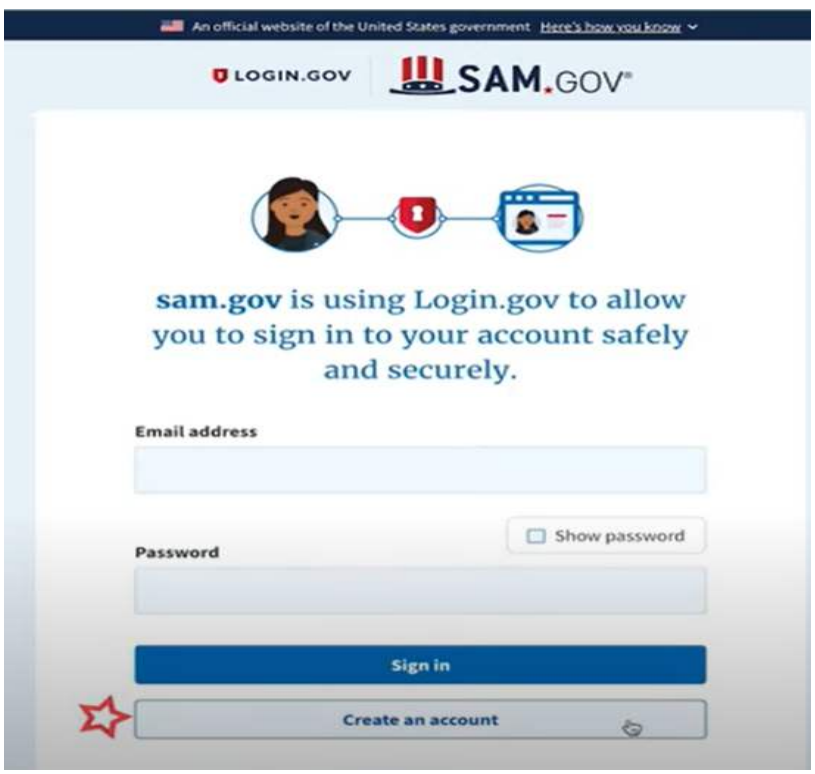
The Data Universal Numbering System (DUNS) is a system developed and managed by Dun and Bradstreet that assigns a unique nine-digit identifier to a business entity. It is a common standard world-wide and was previously used by the U.S. Government to assign unique entity identifiers. This system was retired by the U.S. Government on April 4, 2022 and replaced with the Unique Entity Identifier (SAM). After April 4, 2022 the federal government will have no requirements for the DUNS number.

If the entity was registered in SAM.gov (active or inactive registration), an Unique Entity ID (SAM) was assigned and viewable in the entity registration record in SAM.gov prior to the April 4, 2022 transition. The Unique Entity ID (SAM) can be found by signing into SAM.gov and selecting the Entity Management widget in your Workspace or by signing in and searching entity information.

Instructions detailing the process to be followed in order to obtain an Unique Entity ID (SAM) for your organization begin on the next page.

THE PROCESS FOR OBTAINING AN UNIQUE ENTITY ID IS OUTLINED BELOW:

1. Have the following information ready to request an Unique Entity ID (SAM)
    a. Legal Business Name
    b. Physical Address (including ZIP + 4)
    c. SAM.gov account (this is a user account, not actual SAM.gov business registration).
        i. **As a new user**, to get a SAM.gov account, go to www.sam.gov.
            1. Click "Sign In" on the upper right hand corner.
            2. Click on "Create a User Account"



            3. Choose Account Type:
                a. Create an Individual User Account to perform tasks such as register/update your entity, create and

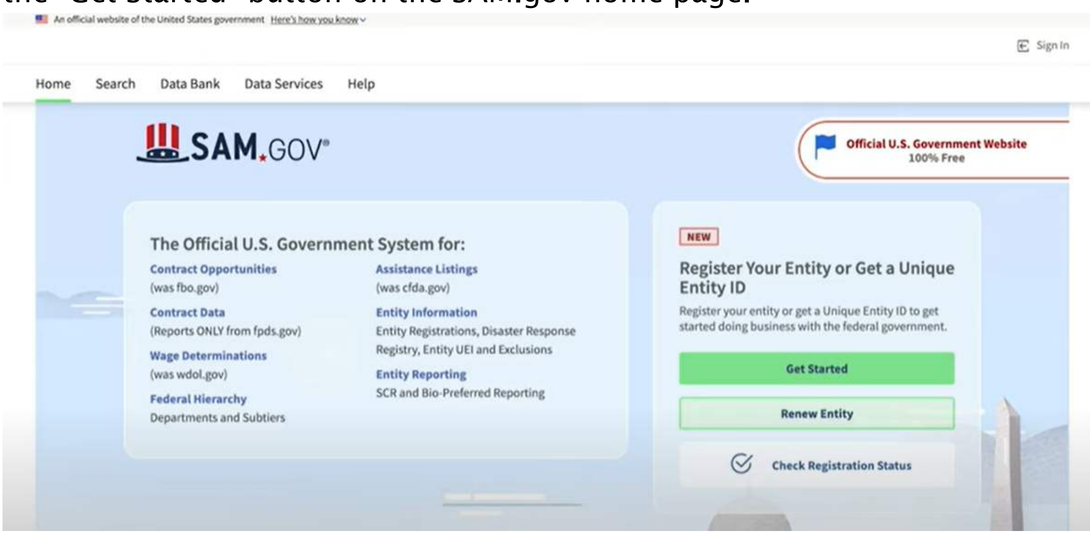
manage exclusion records or to view FOUO level data for entity records.

b. Create a System User Account if you need system-to-system communication or if performing data transfer from SAM to your government database system. Complete the requested information, and then click “Submit.”

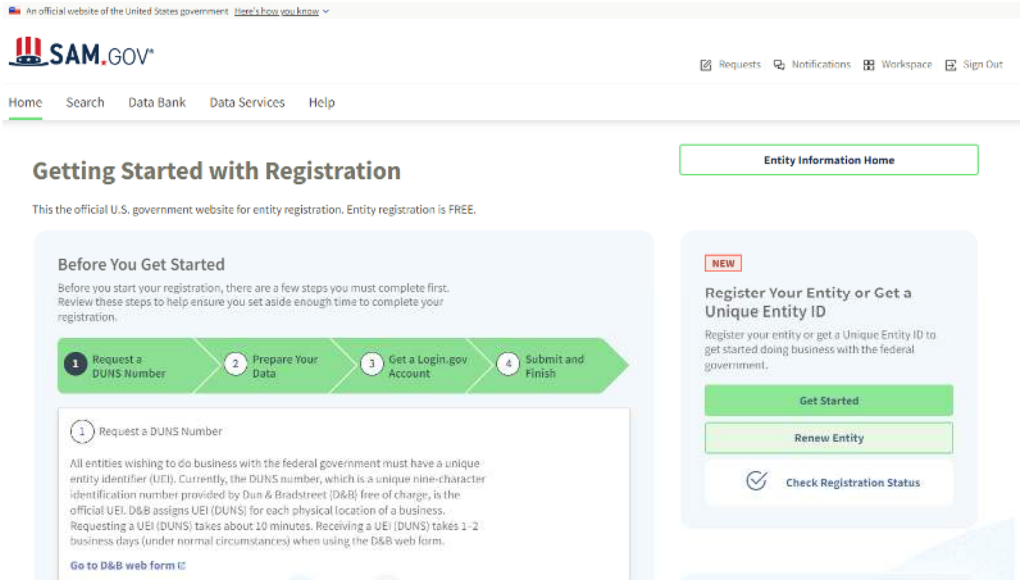
4. Click “DONE” on the confirmation page. You will receive an email confirming you have created a user account in SAM.
5. Click the validation link in the email that contains the activation code within 48 hours to activate your user account. If the email link is not hyperlinked (i.e., underlined or appearing in a different color), please copy the validation link and paste it into the browser address bar. You can now register an entity.

   NOTE: Creating a user account does not create a registration in SAM, nor will it update/renew an existing registration in SAM.

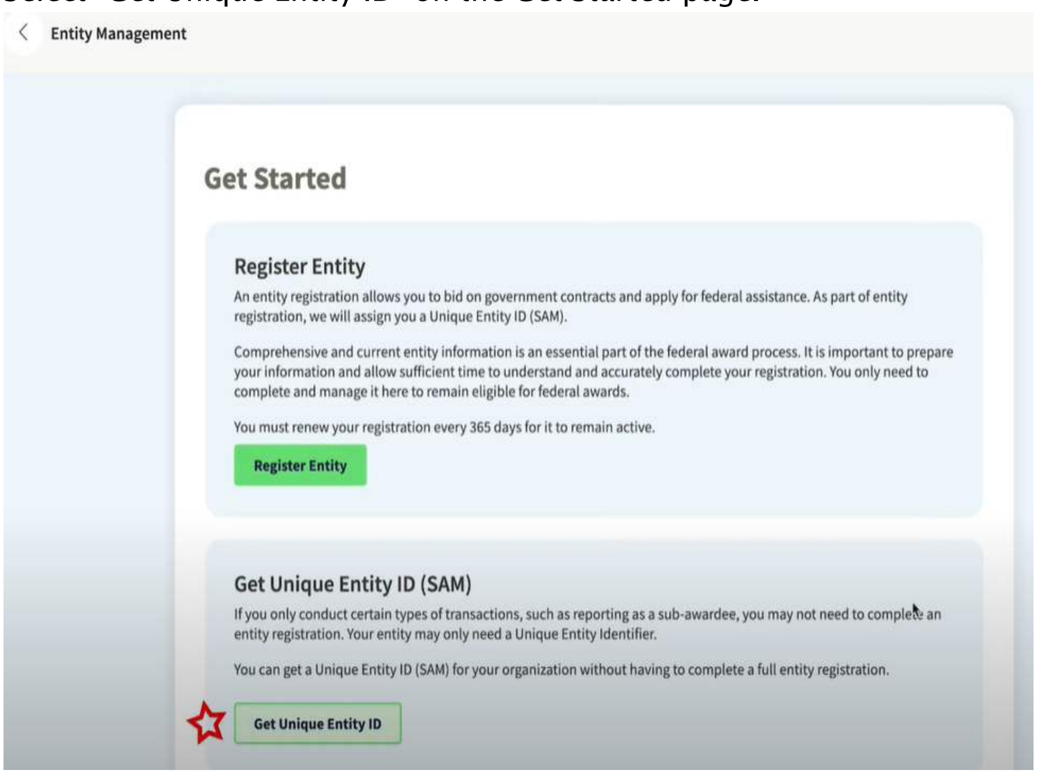
2. Once you have registered as a user, you can get an Unique Entity ID by selecting the “Get Started” button on the SAM.gov home page.



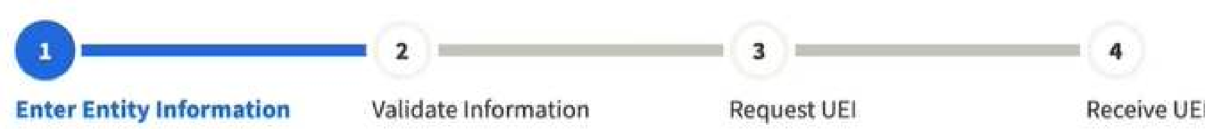
3. Select “Get Started” on the Getting Started with Registration page.



4. Select “Get Unique Entity ID” on the Get Started page.



5. Enter Entity Information.

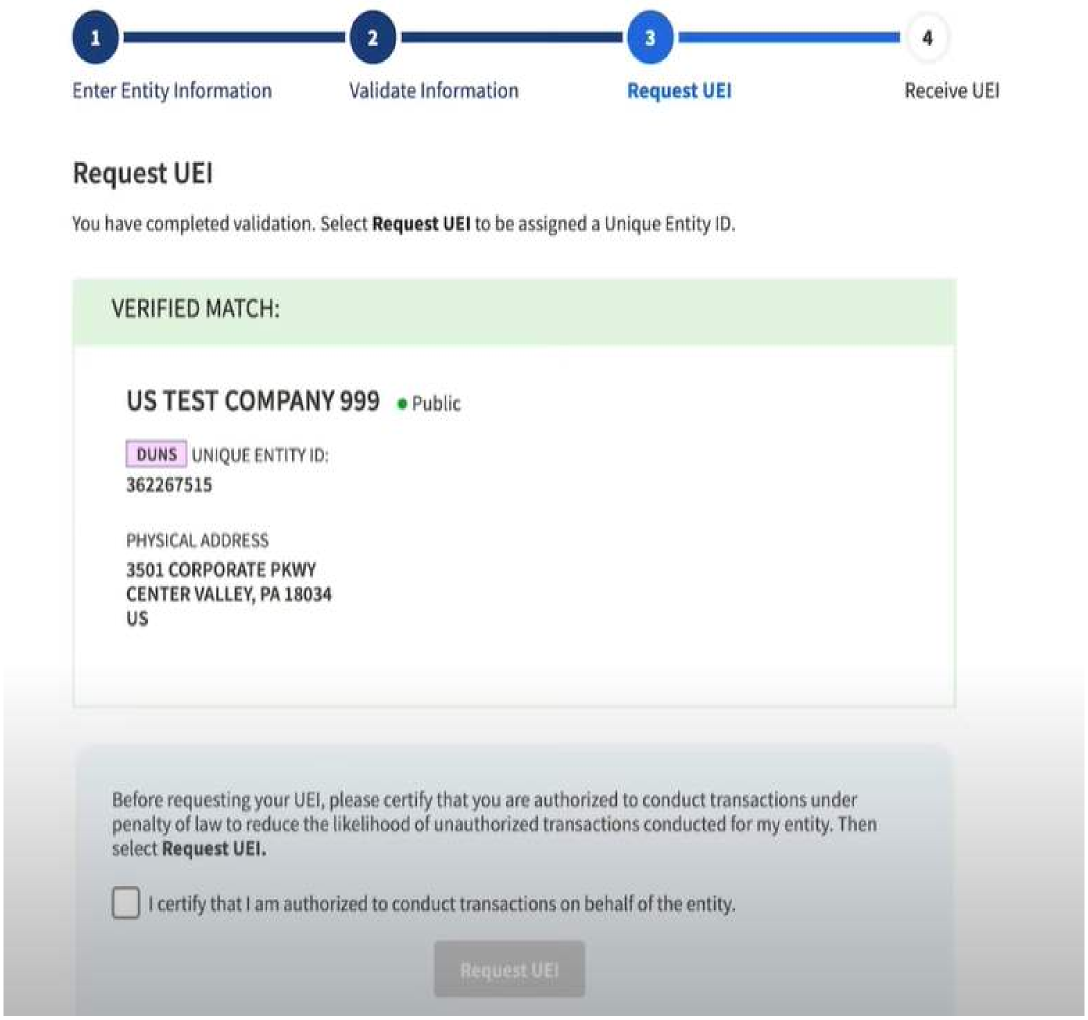


a. If you previously had a DUN Number, make sure your Legal Business Name and Physical Address are accurate and match the Entity Information, down to capitalization and punctuation, used for DUNS registration.

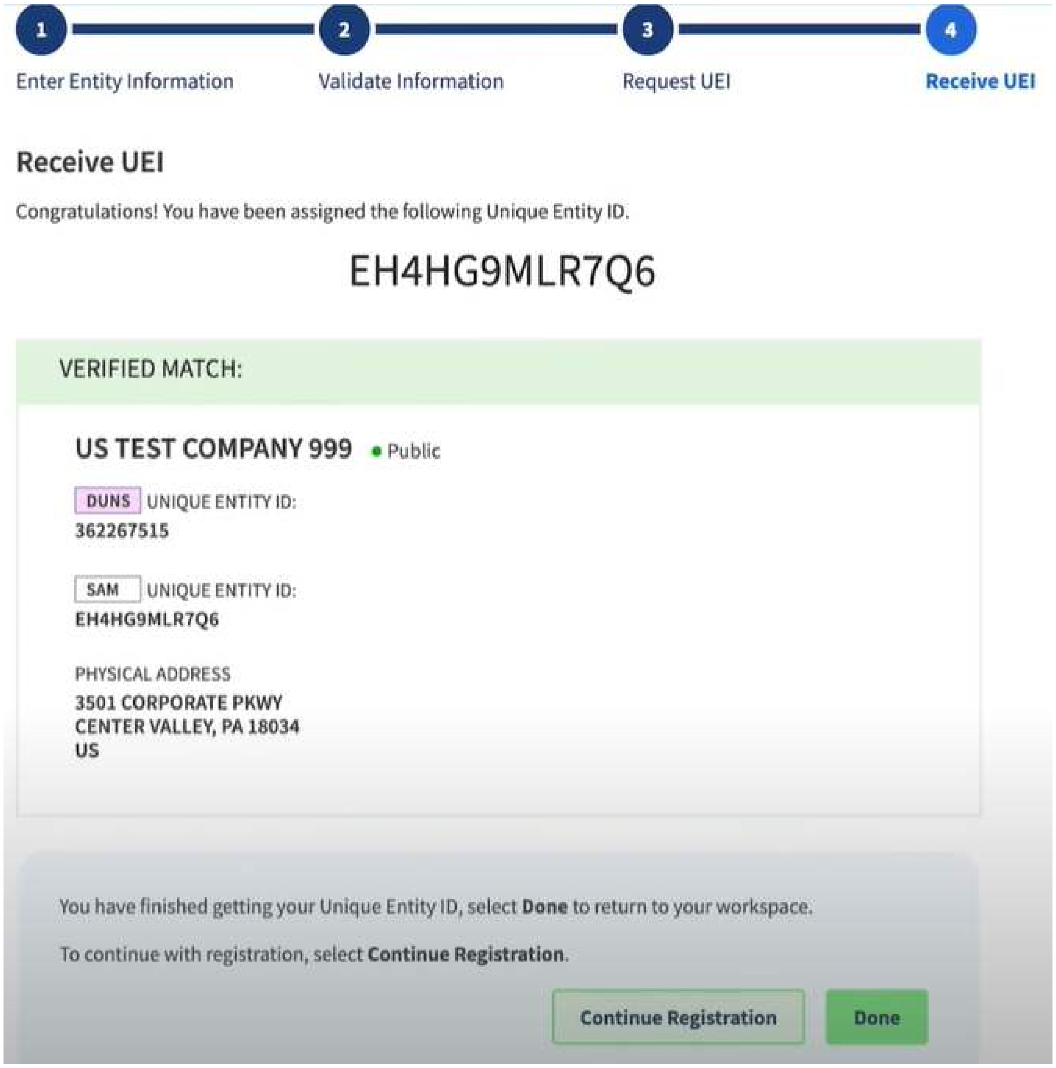
6. When you are ready, select “Next”
7. Confirm your company’s information.

a. On this page you will have the option to restrict the public search of this information. “Allow the selected record to be a public display record.” If you uncheck this box, only you and the federal government users will be able to search and view the entity information and entities like DAI will not be able to independently verify that you have an Unique Entity Identifier (SAM).

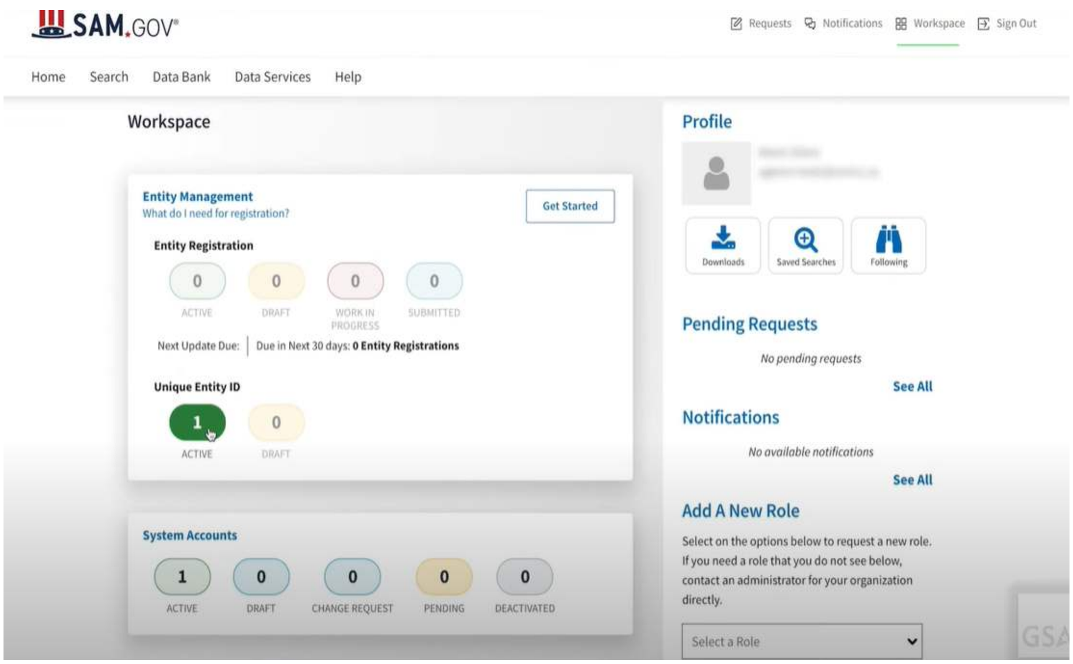
8. When you are ready, select “Next”
9. Once validation is completed, select “Request UEI” to be assigned an Unique Entity ID (SAM). Before requesting your UEI (SAM), you must certify that you are authorized to conduct transactions under penalty of law to reduce the likelihood of unauthorized transactions conducted for the entity.



10. The Unique Entity ID will be shown on the next page. SAM.gov will send an email confirmation with your Unique Entity ID.



11. If you need to view the Unique Entity ID from SAM in the future or update the organization's information, sign into SAM.gov and go to "Entity Management" widget.


SAM.GOV
Requests
Notifications
Workspace
Sign Out
Home
Search
Data Bank
Data Services
Help
Workspace
Entity Management
What do I need for registration?
Get Started
Entity Registration
0 ACTIVE
0 DRAFT
0 WORK IN PROGRESS
0 SUBMITTED
Next Update Due:
Due in Next 30 days: 0 Entity Registrations
Unique Entity ID
1 ACTIVE
0 DRAFT
System Accounts
1 ACTIVE
0 DRAFT
0 CHANGE REQUEST
0 PENDING
0 DEACTIVATED
Profile
Downloads
Saved Searches
Following
Pending Requests
No pending requests
See All
Notifications
No available notifications
See All
Add A New Role
Select on the options below to request a new role. If you need a role that you do not see below, contact an administrator for your organization directly.
Select a Role

10.5 Attachment E: Self Certification for Exemption from Unique Entity ID (SAM)Requirement

Self Certification for Exemption from Unique Entity ID (SAM)
For Subcontractors and Vendors

Legal Business Name: ______________________________

Physical Address: ______________________________

Physical City: ______________________________

Physical Foreign Province (if applicable): ______________________________

Physical Country: ______________________________

Signature of Certifier ______________________________

Full Name of Certifier (Last Name, First/Middle Names): ______________________________

Title of Certifier: ______________________________

Date of Certification (mm/dd/yyyy): ______________________________

The sub-contractor/vendor whose legal business name is provided herein, certifies that we are an organization exempt from obtaining an **Unique Entity ID (SAM)**, as the gross income received from all sources in the previous tax year is under USD $300,000.

*By submitting this certification, the certifier attests to the accuracy of the representations and certifications contained herein. The certifier understands that s/he and/or the sub-contractor/vendor may be subject to penalties, if s/he misrepresents the sub-contractor/vendor in any of the representations or certifications to the Prime Contractor and/or the US Government.

The sub-contractor/vendor agrees to allow the Prime Contractor and/or the US Government to verify the company name, physical address, or other information provided herein. Certification validity is for one year from the date of certification.

10.6 Attachment F: Past Performance Form

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

Instructions: Offerors must provide at least two professional references for consideration as part of the award determination.

Name of the Organization	Activity	Name, Email and Phone Number	Amount Executed	Execution period
		Name: Email: Phone:		
		Name: Email: Phone:		
		Name: Email: Phone:		

10.7 Attachment G: Representations and Certifications of Compliance

1. Federal Excluded Parties List - The Bidder Select is not presently debarred, suspended, or determined ineligible for an award of a contract by any Federal agency.

2. Executive Compensation Certification- FAR 52.204-10 requires DAI, as prime contractor of U.S. federal government contracts, to report compensation levels of the five most highly compensated subcontractor executives to the Federal Funding Accountability and Transparency Act Sub-Award Report System (FSRS)

3. Executive Order on Terrorism Financing- The Contractor is reminded that U.S. Executive Orders and U.S. law prohibits transactions with, and the provision of resources and support to, individuals and organizations associated with terrorism. It is the legal responsibility of the Contractor/Recipient to ensure compliance with these Executive Orders and laws. Recipients may not engage with, or provide resources or support to, individuals and organizations associated with terrorism. No support or resources may be provided to individuals or entities that appear on the Specially Designated Nationals and Blocked persons List maintained by the US Treasury (online at www.SAM.gov) or the United Nations Security Designation List (online at: http://www.un.org/sc/committees/1267/aq_sanctions_list.shtml). This provision must be included in all subcontracts/sub awards issued under this Contract.

4. Trafficking of Persons – The Contractor may not traffic in persons (as defined in the Protocol to Prevent, Suppress, and Punish Trafficking of persons, especially Women and Children, supplementing the UN Convention against Transnational Organized Crime), procure commercial sex, and use forced labor during the period of this award.

5. Certification and Disclosure Regarding Payment to Influence Certain Federal Transactions – The Bidder certifies that it currently is and will remain in compliance with FAR 52.203-11, Certification and Disclosure Regarding Payment to Influence Certain Federal Transactions.

6. Organizational Conflict of Interest – The Bidder certifies that will comply FAR Part 9.5, Organizational Conflict of Interest. The Bidder certifies that is not aware of any information bearing on the existence of any potential organizational conflict of interest. The Bidder further certifies that if the Bidder becomes aware of information bearing on whether a potential conflict may exist, that Bidder shall immediately provide DAII with a disclosure statement describing this information.

7. Business Size and Classification(s) – The Bidder certifies that is has accurately and completely identified its business size and classification(s) herein in accordance with the definitions and requirements set forth in FAR Part 19, Small Business Programs.

8. Prohibition of Segregated Facilities - The Bidder certifies that it is compliant with FAR 52.222-21, Prohibition of Segregated Facilities.

9. Equal Opportunity – The Bidder certifies that it does not discriminate against any employee or applicant for employment because of age, sex, religion, handicap, race, creed, color or national origin.

10. Labor Laws – The Bidder certifies that it is in compliance with all labor laws.

11. Federal Acquisition Regulation (FAR) – The Bidder certifies that it is familiar with the Federal Acquisition Regulation (FAR) and is in not in violation of any certifications required in the applicable clauses of the FAR, including but not limited to certifications regarding lobbying, kickbacks, equal employment opportunity, affirmation action, and payments to influence Federal transactions.

12. Employee Compliance – The Bidder warrants that it will require all employees, entities and individuals providing services in connection with the performance of an DAI Purchase Order to comply with the provisions of the resulting Purchase Order and with all Federal, State, and local laws and regulations in connection with the work associated therein.

By submitting a proposal, offerors agree to fully comply with the terms and conditions above and all applicable U.S. federal government clauses included herein, and will be asked to sign these Representations and Certifications upon award.