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| **MERCY CORPS**  Request for Proposal- CONSULTANT TO UNDERTAKE **STRATEGY AND LOGISTICS TECHNOLOGY ADVANCEMENT**  **RFP NUMBER – HQ517**  Date; 8th February 2024 |

**Contents**

[1](#_Toc158213625)

[I. Mercy Corps Overview 3](#_Toc158213626)

[II. Project Background and Context 3](#_Toc158213627)

[III. Desired Services & Scope of Work 3](#_Toc158213628)

[IV. Analysis of applications 5](#_Toc158213629)

[V. Quotation Format & Requirements 6](#_Toc158213630)

[VI. Other Terms & Conditions 7](#_Toc158213631)

# Mercy Corps Overview

Mercy Corps Northwest, through a grant from Clackamas County, facilitates the distribution of ARPA funds to qualifying community-based organizations (CBOs) within Clackamas County, Oregon. The goal for the $4,000,000 allocation is to address the negative economic impacts from the COVID-19 public health crisis weathered by community-based organizations (“CBOs”). CBOs have expressed significant negative economic impacts from the pandemic, including but not limited to: increased demand for services, changing operational needs and insufficient staffing and funding to address those changes. Additionally, CBOs have cited capacity building needs in technology, strategic planning, and staff learning and development. The CBOs have increased their communications to underserved communities while also pivoting to the demands of COVID-19 protocols. Recognizing the significant contributions of CBOs in pandemic recovery efforts, these dollars are intended to support CBOs in their recovery, resiliency, and sustainability so that they can continue to serve Clackamas County residents negatively affected by the pandemic.

These funds will be critical to address the negative economic impacts experienced by the CBOs and increase their capacity to meet increased service needs.

# Project Background and Context

The focus of the CBRA program is to provide financial support to a pre-set (e.g. 12) CBOs operating in Clackamas Country and to build organizational capacity coming out of Covid-19 and to improve their sustainability, resilience and ability to recover from shocks. As the manager of the program, Mercy Corps used its ASPIRE-lite process to work with the 12 CBOs to draft and finalize with their Boards of Directors a Capacity Development Plan (“CDP”) for this CBRA Program. MCNW’s Program Manager then aggregated the priorities and needs within all CDPs so that MCNW has a master list of capacity building needs. Our plan to address those needs is to work through MCNW staff and consultants to provide the content and information to each CBO based on the needs reflected in their Capacity Development Plan.

Of the 12 CBOs in MCNW’s cohort, 10 CBOs have identified capacity building needs in at least 1 of the following areas listed below:

1. Strategy / Strategic Planning:
   1. 3-5 Year Strategic Plan identification and documentation
   2. Stakeholder List documentation and identifications for use
2. Stakeholder Engagement
   1. Stakeholder Mapping and Stakeholder Experience Mapping
3. Technology Transformation
   1. Telephone and Text Messaging system improvements
   2. Logistics and Service tracking software improvements

Through this Scope of Work, we hope to identify external bodies who have the capacity, expertise, interest and availability to provide informational materials and/or one-to-one consulting to the 10 CBOs in those pre-defined areas referenced above.

# Desired Services & Scope of Work

**Contractor Activities:**

The Contractor will:

* For work related to strategy, strategic planning and stakeholder engagement planning:
  + Meet with CBRA Program Manager to ensure activity alignment with program objectives
  + Review each CBO CDP and any informational materials already sent to CBO by CBRA Program Manager
  + Create and deliver written instructional guidance (1-2 pager) on up to all of the non-profit capacity-building topics listed in the Purpose section above
  + Create and deliver instructional/training videos on up to all of the non-profit capacity-building topics listed in the Purpose section above
  + Create and deliver tools and/or templates on up to all of the non-profit capacity-building topics listed in the Purpose section above using Microsoft Office Suite (Word, Excel, Powerpoint, etc.)
  + Identify overlapping progress and consulting needs between organizations and determine if a group workshop session is more efficient than 1:1 sessions
  + Prepare, organize and schedule 1:1 sessions and/or group workshops including taking notes to report and confirm services provided
  + Facilitate remote training or guidance 1:1 and/or with group workshops with CBOs, ensuring individual CBO goals are met
  + Maintain a repository of all deliverables via central Mercy Corps SharePoint/Google Drive folder
* For work related to technology transformation:
  + Meet with CBRA Program Manager and Executive Director to ensure activity alignment with program objectives
  + Review CBO CDP and any meeting notes reflecting capacity building discussions with the CBO and MCNW
  + Conduct site visits and analysis of existing operations and the technology used
  + Provide assistance in identifying low cost or free license software that improves the operational efficiency and reporting accuracy of the organization
  + Prepare recommendation for the approval of the Executive Director and Board of Directors
  + Design systems, transfer existing data and initiate operational implementation
  + Provide in-person and remote training for all appropriate staff, board members and volunteers
* Training dates, times and locations must be approved by Executive Director and scheduled at least three (3) weeks in advance
* Prepare, organize and schedule 1:1 sessions with Executive Director pre, during and post implementation, including taking notes to report and confirm services provided
* Maintain a repository of all deliverables via central Mercy Corps SharePoint/Google Drive folder

**Contractor Deliverables:**

The Contractor will:

* For work related to strategy, strategic planning and stakeholder engagement planning:
  + Review any informational materials already sent to CBO by CBRA Program Manager
  + Create written instructional guidance (2 pages maximum) on up to all of the non-profit capacity-building topics listed in the Purpose section above. Guidance shall be written and submitted in Microsoft Word as step-by-step instructions on how to implement each topic area across an organization. Guidance shall include the following:
    - Background Instructional Information:
      * Up to 5 short (up to 2-5 minute) videos explaining the basics of the topic area. Links to existing content is encouraged.
      * Up to 5 expanded resource written materials (articles, blogospheres, resource libraries). Links to existing content is encouraged.
    - Up to 20-step Step-by-Step Action Plan with Tools & Templates:
      * Each action step must include the following:
        + Title of action step
        + Step action type (i.e. Team Meeting, Written Exercise, etc.)
        + Estimated time for action
        + Up to 5 tools and/or templates using Microsoft Office Suite (Word, Excel, Powerpoint, etc.)
  + Submit draft of instructional guidance in Word format to CBRA Program Manager for final expectation alignment check via central Mercy Corps Program Sharepoint folder
  + Review and revise instructional guidance based on CBRA Program Manager’s comments of draft
  + Submit final instructional guidance in PDF format, along with all linked materials referenced in the instructional guidance via central Mercy Corps Program Sharepoint folder and via email to CBO Executive Director
  + Provide up to 360 hours of direct capacity building technical assistance (workshops or 1:1 training or guidance with CBOs)
  + Provide up to 80 hours of administration time in scheduling and preparing for 1:1 sessions, and documenting outcomes to report and confirm services provided
  + Maintain a repository of all deliverables via central Mercy Corps SharePoint/Google Drive folder
* For work related to technology transformation:
  + Meet with CBRA Program Manager and Executive Director to ensure activity alignment with program objectives
  + Coordinate with Executive Director to conduct up to 6 hours of site visits on peak service days
  + Spend up to ten (10) hours to provide analysis of existing operations, the technology used and prepare an evaluation and recommendation report which shall include but not limited to:
* At least three (3) recommendations for low-cost or free license software that improves the operational efficiency and reporting accuracy of the organization, and including specific procedural examples
* An implementation and training plan and timeline that ensures all work to be completed by August 30, 2024, and within the allowable budget
* Receive approval from the Executive Director and Board of Directors on implementation and training plan and timeline, including any additional approvals to purchase recommended technologies
* Design systems, transfer existing data and initiate operational implementation (up to 50 hours)
* Provide up to twenty (20) hours of in-person and/or remote workshops/training and troubleshooting for all appropriate staff, board members and volunteers
* Spend up to 12 hours over the course of the engagement to take notes to report and confirm services provided
* Maintain a repository of all deliverables via central Mercy Corps SharePoint/Google Drive folder

The contractor shall complete the duties described from on or about January 25, 2024 to August 30, 2024 for Mercy Corps Northwest throughout the year, which may include weekdays, evenings and weekends.

# Analysis of applications

Applications will be analyzed based on firms' capability and experience of the proposed team, firm experience with similar scope of assignment, similar projects handled and the cost reasonableness.

Evaluation Criteria:

1. Management/Organizational Capacity Criteria (35% weight):
2. Technical Criteria (25% weight):
3. Adherence to RFP requirements (15% weight):
4. Cost (in range, reasonable, market analysis) (25% weight)

We reserve the right to interview short listed applicants to determine the best fit.

# Quotation Format & Requirements

Standard Quotations formats are acceptable provided the following information is included:

1. Name, address, telephone number and email address for the bidding firm.
2. A duly registered firm – attach copy of certificate of incorporation.
3. Evidence of being complaint with tax obligation in the country where incorporated
4. A detailed methodology and understanding of SoW
5. Broken down financial proposal clearly indicating daily rates for proposed positions and any other cost
6. Time plan
7. UEI and EIN
8. Must be able to receive ACH electronic bank payments
9. Company Profile, 2 page max
10. References from previous similar work projects (including contact information)

Required qualifications and experience of the Consultant:

* A duly registered firm.
* Compliance with tax requirements

**Required Experience & Skills:**

* Past history working with nonprofits relating to strategic planning
* Past history working with nonprofits relating to stakeholder planning and engagement
* Past history working with nonprofits relating to technology transformation, including analysis of existing systems, recommending low-cost or free solutions to implement, maintain, use and integrate
* Past history training nonprofit staff, volunteers and board members on technologies

RFP CALENDAR/TIMELINE

* RFP release date 8th February 2024
* Last day of receiving questions  15th Feb 2024 at 5PM Pacific time
* Response to questions (website) 21st Feb 2024 at 5PM Pacific time
* RFP responses due 26th Feb 2024 at 5PM Pacific time

All proposals and submissions to be sent to tenders@mercycorps.org clearly indicate tender number and description in the subject line.

All questions or request for clarification to be sent to lkagai@mercycorps.org and all consolidated responses will be uploaded on the website along with the RFP.

# Other Terms & Conditions

**WITHDRAWAL OF RFP**

Applications may be withdrawn before the RFP submittal deadline by submitting a written request to the Contact Person. Re-submittal before the RFP submittal deadline can be made; however, they may not be re-submitted after the deadline.

**RFP COSTS**

All costs incurred in the preparation and presentation of quotations to the RFP shall be completely absorbed by the responding party to the RFP. All documents submitted as part of the RFP will become property of the Mercy Corps. Requests for specific material to be returned will be considered. Any material submitted that is confidential must be clearly marked as such.

**AWARD BASIS**

At the option of the Mercy Corps, finalists for the Agent designation may be selected for a final round of negotiations; however, applicants are encouraged to present their best offers with their initial submission. Mercy Corps reserves the right to accept or reject any and all quotations, to waive any irregularities in any quotation process, and to make an award of contract in any manner in which Mercy Corps, acting in the sole and exclusive exercise of its discretion, deems to be in Mercy Corps best interest.

**CONTRACTUAL DEVELOPMENT**

Once an applicant is approved as the exclusive Agent, the successful respondent will enter into a contract with the Mercy Corps. Contract discussion and negotiation will follow the award selection. Bidders must be amenable to inclusion, in a contract, of any information provided whether herein or in response to this RFP or developed subsequently during the selection process.

**CONTRACT TERMS**

Firms that are selected as the exclusive Agent are eligible to enter into a service contract. Mercy Corps may terminate the contract upon written notice to the Agent of not less than thirty (30) days.

**EQUAL OPPORTUNITY**

Mercy Corps emphasizes that all respondents will receive full consideration without regard to race, color, religion, sex, national origin, sex, disability, age or sexual orientation. Minority and women-owned firms are especially encouraged to respond to this RFP.

**LIMITATIONS**

Mercy Corps reserves the right to reject any and all proposals and to waive any informality in the solicitation process. Total proposal length excluding cover letter, details of professionals who will provide services, and contact information of client references, should not exceed 12 pages.