

Request for Quote/Proposal (RFQ/RFP)

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| Commodity/Service Required: | Rapid Education Risk Analysis for the Lebanon’s Education Sector |
| Type of Procurement: | Consultancy Agreement |
| Type of Contract: | Fixed Price |
| Term of Contract: | December 2023 – March 2024 |
| Contract Funding: | USAID |
| This Procurement supports: | USAID/Quality Instruction Towards Access and Basic Education Improvement (QITABI) 3 |
| Submit Proposal to: | Hannah Olmstead – holmstead@rti.org and copy Melody Cacas – mcacas@rti.org |
| Date of Issue of RFP: | November 23, 2023 |
| Date Questions from Supplier Due: | November 28, 2023 Send your questions to: Hannah Olmstead – holmstead@rti.org and copy Melody Cacas – mcacas@rti.org |
| Date Proposal Due: | December 4, 2023 |
| Approximate Date Purchase Order Issued to Successful Bidder(s): | December 8, 2023 |

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| Method of Submittal: Email | |
| Email to: Hannah Olmstead – holmstead@rti.org and copy Melody Cacas – mcacas@rti.org | |
| Respond via e-mail with attached document in MS Word / pdf format. The Bidder/Lessor agrees to hold the prices in its offer firm for 90 days from the date specified for the receipt of offers unless another time is specified in the addendum of the RFP/RFQ. | |
| Solicitation Number: | RFP-QITABI-2024-002 |

Attachments to RFP:

- Attachment “A” – Commodity Specifications
- Attachment “B” – Instructions to Bidders/Sellers
- All PO Terms and Conditions are listed on our website at forth at:
<https://www.rti.org/sites/default/files/rti-purchase-order-terms-and-conditions-v1.16.pdf>,
http://www.rti.org/files/PO_FAR_Clauses.pdf or for commercial items:
http://www.rti.org/files/PO_FAR_Clauses_Commercial_Items.pdf (hereinafter the “Terms”).
 Supplier’s delivery of products, performance of services, or issuance of invoices in connection with this purchase order establishes Supplier’s agreement to the Terms. The Terms may only be modified in writing signed by both parties.



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All bidders/sellers are responsible to carefully review each attachment and follow any instructions that may be relevant to this procurement.

Attachment A
Commodity Specifications or Statement of Work

Statement of Work to Conduct a Rapid Education Risk Analysis (RERA) for Lebanon's Education Sector

I. BACKGROUND

Under the USAID-funded Quality Instruction Towards Access and Basic Education Improvement (QITABI) 3 Activity, Research Triangle Institute (RTI) is seeking the services of a local consultant/s to conduct an education situation analysis. QITABI 3 is a 5-year Activity that aims to, in collaboration with the Ministry of Education and Higher Education (MEHE) and Center for Educational Research and Development (CERD), improve the national-level service delivery of inclusive education and improve instruction resulting in gains in literacy, numeracy, and social-emotional skills across all grades.

II. SCOPE OF WORK

The situation analysis will utilize USAID's Rapid Education Risk Analysis (RERA) toolkit. The consultant will carry out the situation analysis in close collaboration and partnership with RTI Lebanon and RTI Home Office team, who will provide technical support and review the deliverables.

The RERA is a rapid but comprehensive situation analysis of educational institutions, learners, and communities, treating them as a dynamic network of relationships encompassing assets and various contextual risks. It includes essential components from rapid education needs assessment along with contextual risk analyses like conflict analysis, disaster risk assessment, and resilience analysis. The primary focus of a RERA is to: (1) examine the impact of risks on the school community; (2) determine the reciprocal influence of education on risks; and (3) analyze how different contextual risks influence each other.

PURPOSE

The purpose of the situational analysis is to investigate how contextual risks, such as the financial crises, school closures resulting from teacher strikes; and insecurity and volatile context in the country have impacted education. The research will investigate:

- (1) Broader contextual risks to education;
- (2) Groups affected by those risks;
- (3) Existing resilience and coping strategies among different groups, offering chances to strengthen community resilience; and
- (4) Opportunities to address risks, building self-reliance and promoting sustainable solutions that draws on local culture and norms.

The situation analysis will build on QITABI 2's RERA conducted in 2020 in response to the pandemic. The end-product of this consultancy is an extensive analysis report aimed at bolstering the Lebanon's path to self-reliance. It will focus on enhancing the education system and addressing the factors impacting the education outcomes, thereby mitigating programmatic, fiduciary, and institutional risks.

RESEARCH QUESTIONS

Below are research questions that will serve as a starting point for the RERA:

- How has the crisis or emergency affected access to and availability of education for different population groups? What kind of barriers have prevented vulnerable children such as girls or children with disabilities, from accessing education?
- How have actors at different levels (macro [ministries, organizations, donors], meso [local NGOs, teacher training programs, community groups] and micro [schools, home]) responded to different crises since 2020?
- What is the status of teaching and learning materials, curriculum delivery, and teacher training? How has the financial crisis impacted the quality of education, including the availability of qualified teachers?
- Which groups of learners are most vulnerable during the financial crisis, and what are their specific needs? Do any displaced populations or children with disabilities require specific support?
- What protection risks do children face in the education environment during the crisis? (e.g., gender-based violence, child recruitment). Are safe learning spaces and mechanisms in place to protect children from harm?
- To what extent are education services continuing during the crisis? What alternative education modalities are being used, and how effective are they?
- What is the condition of education infrastructure, including schools and learning facilities? Have schools been damaged or repurposed for other uses during the crisis?
- How are local communities and parents involved in supporting education during the crisis? Are community-based initiatives in place to ensure education continuity?
- What is the capacity of the government and education authorities to respond to the education needs of affected populations? What policies or measures have been put in place to address education risks?
- What are the potential long-term effects of the crisis on the education system and the prospects of learners?
- Are follow-up mechanisms being used so that the trainings and implementation are carried out in meaningful ways to ensure the safety of all children?

Sample:

The sample will encompass a representative group of key informants from various education stakeholders, formal and non-formal, including:

- Officials from the MEHE and CERD along with heads of departments, academic specialists, coaches, and trainers.
- Education personnel from both public and private schools, including principals, teachers, and administrators.
- Students across all grades from both public and private schools, with a specific focus on displaced population.
- Representatives from the low-cost schools' associations and non-formal education

Regional Representation:

To promote inclusivity, key informants will be selected to represent various regions, ensuring regional diversity. Each governorate, including Mount Lebanon, Beirut, Nabatieh/South Lebanon, North Lebanon/Akkar, and Baalbek-Hermel, will have proportionate representation.

This approach will capture the nuances and challenges of different regions for a comprehensive understanding of the education landscape across different regions.

LEVEL OF EFFORT AND TIMELINE

This consultancy is scheduled to be carried out from mid-December 2023 to March 2024, with the Level of Effort distributed over a maximum of 30 working days.

LOCATION

The consultancy and associated work are planned to take place in Lebanon. In-country presence is strongly advised to effectively carry out the tasks and engage with the local context.

REPORTING

The consultant/s will report to QITABI3 DCOP.

APPLICATION SUBMISSIONS GUIDELINE

Interested candidates should submit the following:

- A written proposal outlining clear data collection methodology, tools, and work plan.
- CV and cover letter covering the intention and the interest of the applicant, and the skills, expertise the applicant offers to ensure the success of the study.
- A clear budget and budget narrative explaining the expected costs.
- A writing sample demonstrating the applicant's prior experience in similar work.

Product or Service Expectations (both if applicable):

Qualifications required:

- Minimum of five years' experience in leading and conducting a study.
- Experience and expertise in basic education with a strong understanding of education in conflict and crisis environments.
- Established relationships with networks, research/academic institutions, and implementing organizations in the field of research, conflict analysis, and gender equality.
- Knowledge of risk assessment, context analysis, situation analysis methodologies.
- Strong knowledge of USAID programs.

Skills required:

- Ability to write high-quality technical documents in Arabic and English.
- Ability to conduct literature search and desk reviews involving academic and grey literature.
- Ability and experience in conducting primary data collection (should this be needed).
- Skilled in working under pressure in high-risk situations within fragile states in MENA.
- Skilled in working in a collaborative, multicultural environment involving multiple stakeholders.
- Fluency in written and spoken Arabic and English; master's degree in a related field.

Location and Timeline

- This consultancy is scheduled to be carried out from mid-December 2023 to March 2024, with the Level of Effort distributed over a maximum of 30 working days.
- The consultancy and associated work are planned to take place in Lebanon.

Deliverables, Timelines, Special Terms and Conditions:

Delivery to :

RTI QITABI 3 6th floor, Azar Building, Hayek roundabout, Sin El Fil, Beirut, Lebanon

Timeline :

December 2023 to March 2024

Payment :

Payment via wire transfer within 30 days receipt of invoices after delivery.

If the supplier proposes alternative payment terms-please specify them in the quotation.

Pricing

Please provide a clear budget and budget narrative explaining the expected costs.

Additional Information for Delivery Schedule:

By signing this attachment, the bidder confirms he has a complete understanding of the specifications and fully intends to deliver items that comply with the above listed specifications.

Signature:

Title:

Date:

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**Attachment “B”
Instructions to Bidders/Sellers**

1. **Procurement Narrative Description:** The Buyer (RTI) intends to purchase commodities and/or services identified in Attachment A. The Buyer intends to purchase the quantities (for commodities) and/or services (based on deliverables identified in a Statement of Work). The term of the Ordering Agreement shall be from Award Date to the Delivery date of the Offeror unless extended by mutual agreement of the parties. The Buyer intends to award to a single “approved” supplier based on conformance to the listed specifications, the ability to service this contract, and selling price. We reserve the right to award to more than one bidder. If an Ordering Agreement is established as a result of this RFQ/RFP, the supplier understands that quantities indicated in the specifications (Attachment A) are an estimate only and RTI does not guarantee the purchase quantity of any item listed.
2. **Procuring Activity:** This procurement will be made by **Research Triangle Institute (RTI International)**, located at

RTI QITABI 3 6th floor, Azar Building, Hayek roundabout, Sin El Fil, Beirut, Lebanon

who has a purchase requirement in support of a project funded by

USAID LEBANON

RTI shall award the initial quantities and/or services and any option quantities (if exercised by RTI) to Seller by a properly executed Purchase Order as set forth within the terms of this properly executed agreement.

3. **Proposal Requirements.** All Sellers will submit a quote/proposal which contains offers for all items and options included in this RFQ/RFP. All information presented in the Sellers quote/proposal will be considered during RTI’s evaluation. Failure to submit the information required in this RFQ/RFP may result in Seller’s offer being deemed non-responsive. Sellers are responsible for submitting offers, and any modifications, revisions, or withdrawals, to reach RTI’s office designated in the RFQ/RFP by the time and date specified in the RFQ/RFP. Any offer, modification, revision, or withdrawal of an offer received at the RTI office designated in the RFQ/RFP after the exact time specified for receipt of offers is “late” and may not be considered at the discretion of the RTI Procurement Officer. The Seller’s proposal shall include the following:
 - (a) The solicitation number:
 - (b) The date and time submitted:
 - (c) The name, address, and telephone number of the seller (bidder) and authorized signature of same:
 - (d) Validity period of Quote:
 - (e) A technical description of the items being offered in sufficient detail to evaluate compliance with the requirements in the solicitation. This may include product literature, or other documents, if necessary.
 - (f) If RTI informs Seller that the Commodity is intended for export and the Commodity is not classified for export under Export Classification Control Number (ECCN) “EAR99”

of the U.S. Department of Commerce Export Administration Regulations (EAR), then Seller must provide RTI the correct ECCN and the name of Seller's representative responsible for Trade Compliance who can confirm the export classification.

- (g) Lead Time Availability of the Commodity/Service.
 - (h) Terms of warranty describing what and how the warranties will be serviced.
 - (i) Special pricing instructions: Price and any discount terms or special requirements or terms (special note: pricing must include guaranteed firm fixed prices for items requested.
 - (j) Payment address or instructions (if different from mailing address)
 - (k) Acknowledgment of solicitation amendments (if any)
 - (l) Past performance information, when included as an evaluation factor, to include recent and relevant contracts for the same or similar items and other references (including points of contact with telephone numbers, and other relevant information)
 - (m) **Special Note:** *The Seller, by his response to this RFQ/RFP and accompanying signatures, confirms that the terms and conditions associated with this RFQ/RFP document have been agreed to and all of its attachments have been carefully read and understood and all related questions answered.*
4. **Forms:** Sellers (potential bidders or suppliers) must record their pricing utilizing the format found on Attachment "A". Sellers must sign the single hardcopy submitted and send to address listed on the cover page of this RFQ/RFP.
5. **Questions Concerning the Procurement.** All questions in regards to this RFQ/RFP to be directed to
- Hannah Olmstead and copy Melody Cacas
- at this email address:
- Holmstead@rti.org and mcacas@rti.org
- The cut-off date for questions is *(insert date)*.
- November 28, 2023
6. **Notifications and Deliveries:** Time is of the essence for this procurement. Seller shall deliver the items or services no later than the dates set forth in the contract that will be agreed by both parties as a result of this RFQ/RFP. The Seller shall immediately contact the Buyer's Procurement Officer if the specifications, availability, or the delivery schedule(s) changes. Exceptional delays will result in financial penalties being imposed of Seller.

7. **Documentation:** The following documents will be required for payment for each item:
 - (a) A detailed invoice listing Purchase Order Number, Bank information with wiring instructions (when applicable)
 - (b) Packing List
 - (c) All relevant product/service documentation (manuals, warranty doc, certificate of analysis, etc.)
8. **Payment Terms:** Refer to RTI purchase order terms and conditions found in <https://www.rti.org/sites/default/files/rti-purchase-order-terms-and-conditions-v1.16.pdf> , http://www.rti.org/files/PO_FAR_Clauses.pdf, or http://www.rti.org/files/PO_FAR_Clauses_Commercial_Items.pdf. Payment can be made via wire transfer or other acceptable form. Sellers may propose alternative payment terms and they will be considered in the evaluation process.
9. **Alternative Proposals:** Sellers are permitted to offer “alternatives” should they not be able to meet the listed requirements. Any alternative proposals shall still satisfy the minimum requirements set forth in Attachment A Specifications.
10. **Inspection Process:** Each item shall be inspected prior to final acceptance of the item. All significant discrepancies, shortages, and/or faults must be satisfactorily corrected and satisfactorily documented prior to delivery and release of payment.
11. **Evaluation and Award Process:** The RTI Procurement Officer will award an agreement contract resulting from this solicitation to the responsible Seller (bidder) whose offer conforms to the RFQ/RFP will be most advantageous to RTI, price and other factors considered. The award will be made to the Seller representing the **best value** to the project and to RTI. For the purpose of this RFQ/RFP, price, delivery, technical and past performance are of equal importance for the purposes of evaluating, and selecting the “best value” awardee. RTI intends to evaluate offers and award an Agreement without discussions with Sellers. Therefore, the Seller’s initial offer should contain the Seller’s best terms from a price and technical standpoint. However, RTI reserves the right to conduct discussions if later determined by the RTI Procurement Officer to be necessary.

The evaluation factors will be comprised of the following criteria:

- (a) **PRICE.** Lowest evaluated ceiling price (inclusive of option quantities).
- (b) **DELIVERY.** Seller provides the most advantageous delivery schedule.
- (c) **TECHNICAL.** Items/Services shall satisfy or exceed the specifications described in RFQ/RFP Attachment A.
- (d) **PAST PERFORMANCE** - Seller can demonstrate his/her capability and resources to provide the items/services requested in this solicitation in a timely and responsive manner.
- (e) **OTHER EVALUATION CRITERIA.**

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12. **Award Notice.** A written notice of award or acceptance of an offer, mailed or otherwise furnished to the successful supplier within the time acceptance specified in the offer, shall result in a binding contract without further action by either party.

13. **Validity of Offer.** This RFP in no way obligates RTI to make an award, nor does it commit RTI to pay any costs incurred by the Seller in the preparation and submission of a proposal or amendments to a proposal. Your proposal shall be considered valid for 90 days after submission.
14. **Representations and Certifications.** Winning suppliers under a US Federal Contract are required to complete and sign as part of your offer RTI Representations and Certifications for values over \$10,000.
15. **Anti- Kick Back Act of 1986.** Anti-Kickback Act of 1986 as referenced in FAR 52.203-7 is hereby incorporated into this Request for Proposal as a condition of acceptance. If you have reasonable grounds to believe that a violation, as described in Paragraph (b) of FAR 52.203-7 may have occurred, you should report this suspected violation to the RTI's Ethics Hotline at 1-877-212-7220 or by sending an e-mail to ethics@rti.org. You may report a suspected violation anonymously.
16. **The John S. McCain National Defense Authorization Act for fiscal year 2019 - section 889.** RTI cannot use any equipment or services from specific companies, or their subsidiaries and affiliates, including Huawei Technologies Company, ZTE Corporation, Hytera Communications Corporation, Hangzhou Hikvision Digital Technology Company, and Dahua Technology Company ("Covered Technology"). In response to this request for proposal, please do not provide a quote which includes any Covered Technology. Any quote which includes Covered Technology will be deemed non-responsive. Additionally, if the United States Government is the source of funds for this RFP, the resulting Supplier shall not provide any equipment, system, or service that uses Covered Technology as a substantial or essential component

Acceptance:

Seller agrees, as evidenced by signature below, that the seller's completed and signed solicitation, seller's proposal including all required submissions and the negotiated terms contained herein, constitute the entire agreement for the services described herein.

By: *(Seller Company Name)*

Signature: _____

Title:

Date: