14 June 2018

**Request for Proposal and Quotation: Programme Funding Consultant Framework**

**INSTRUCTIONS TO BIDDERS**

**Request for Proposal Pack**

The RFP pack for this Service is comprised of:

1. These Instructions to Bidders
2. Terms of Tendering
3. The Request for Proposal, outline service requirements
4. ActionAid UK Standard Supplier Contract Terms
5. New Supplier Pre-Qualification Questionnaire

**Introduction to ActionAid UK**

ActionAid is a leading international charity working in over 45 countries. We work with the poorest women and girls in the world, changing their lives for good.

ActionAid UK (AAUK) raises money to support ActionAid’s programme work to transform communities; we influence policy to change the systems and structures that keep people poor; we carry out research and put pressure on governments and key decision makers to effect global change.

Further details can be found on our website: [www.actionaid.org.uk](http://www.actionaid.org.uk)

**Background to Services**

ActionAid UK is part of the ActionAid Federation, and as such plays a key role in global fundraising to support the work of the global federation. As part of the 2017-2022 strategy, ActionAid UK has committed to increase annual income significantly by 2022 through three primary fundraising teams within ActionAid UK.

• **International Development Policy and Practice (**IDPP) plays a key role in securing and managing ActionAid UK’s institutional funding for development programmes and projects from donors including the UK Department for International Development (DFID), the Big Lottery Fund, Comic Relief and the European Commission Directorate General for International Cooperation and Development (DG DEVCO).

• **Philanthropy and Partnerships** (P&P) leads ActionAid UK’s work to secure and manage funding from trusts, foundations, corporate partners and major donors.

In order to deliver the strategy, these teams need to scale up the quantity, quality and value of grant and contract proposals that are submitted on behalf of ActionAid UK. To this end, ActionAid UK will establish a Consultant Framework of highly skilled, professional consultants to support our programme funding work over the next three years (September 2018 – August 2021). We expect to tender upward of 30 opportunities per year, with minimum value of £70,000 per year.

**Evaluation Process and Award Criteria**

***Pre-Qualification:*** All bidders must first pass minimum standards of financial viability, probity, and legal compliance. This will be assessed based on independent credit checks, sanctions screening, and information provided in the New Supplier Pre-Qualification Questionnaire (PQQ) which must be returned together with proposals. We may request evidence of any information set out in the PQQ document and reserve the right to reject any proposals where evidence cannot be provided.

The Consultant Framework will include three lots:

* **Lot 1: Bid Management**. Through Lot 1 we will tender opportunities for bid management, including coordination, writing and submission of grant and contract proposals to institutional donors, trusts, foundations, corporate partners, and major donors.
* **Lot 2**: **Budget/financial Management.** Through Lot 2, we will tender opportunities for financial/budget management of bids, including developing and refining budgets and budget narratives, contributing to commercial narratives and value for money arguments, and payment by results frameworks.
* **Lot 3**: **Monitoring and Evaluation**. Through Lot 3, we will tender opportunities for monitoring and evaluation support to proposal development, including designing logical frameworks, monitoring and evaluation frameworks and approaches, and approaches to payment by results.

We are seeking the following skills and experience at a minimum. Consultants may bid to participate in multiple lots, providing they meet the requirements outlined in each.

**Lot 1 (Bid Management):**

We would welcome consultants with experience in one or more of the areas below:

* Experience leading all aspects of bid development for grants, including:
  + **DFID grant** concept notes and proposals (experience with UK Aid Match, UK Aid Direct, UK Aid Connect, GEC or Amplify Change preferred);
  + **Comic Relief** concept notes and proposals;
  + **Big Lottery Fund** concept notes and proposals;
  + **DG DEVCO** concept notes and full applications;
  + **High value donors** concept notes, full applications and reports

This would include all aspects of bid development, including as an illustrative list:

* + Overall bid coordination and stewardship of bid team;
  + Analysis of Call for Proposals, Terms of Reference, Guidelines or other donor documents;
  + Supporting
  + Partner/consortium analysis and assessment against donor priorities and requirements, and development and execution of a strong partnership strategy to identify and secure the best partners;
  + Negotiation of scope of work and budget with partners, and formalizing through agreements;
  + Facilitating programme design workshops and discussions;
  + Proposal writing (for high value donors experience of translating complex information into simpler language suitable for the relevant high value audience);
  + Advising on programme governance and management;
  + Advising on logical frameworks and M&E frameworks;
  + Preparation of work plans, work orders, action plans, etc.;
  + Preparation of track record/previous experience evidence and write-up;
  + Proposal-based recruitment, staffing and CVs as required as part of the proposal process;
  + Supporting value for money, budget narrative and alignment of budget to proposal; and
  + Ensuring proposal and programme design are aligned with DFID priorities, compliance and contracting requirements.
* Experience leading all aspects of bid development for **DFID commercial tenders**, including all bullet points above, with the addition of:
  + Preparation of Supplier Selection Questionnaire (SSQ) responses, including selecting and writing up programmatic track records, organizational and programmatic capacity and experience, and commercial and financial requirements;
  + Overall coordination and management of Invitation To Tender (ITT) documents, including: technical narrative; commercial narrative; proposal-based recruitment, programme management, payment by results planning.

**Lot 2 (Budget/Financial Management):**

We would welcome consultants with experience in one or more of the areas below:

* + **DFID commercial tenders:** Comprehensive experience leading the development of DFID pro forma and commercial tenders as a consortium member or lead supplier, including:
    - Preparation of internal budgets and *pro formas* for submission to DFID
    - Developing appropriate risk management structures to support payment by results;
    - Experience successfully negotiating programmatic deliverables and budgets with a lead supplier (when part of a consortium).
  + **Grant proposals for DFID, DEVCO, Comic Relief, Big Lottery Fund, or other donors above:** Comprehensive experience leading the development of proposal budgets, including analysis of call for proposal documents, alignment to work plans, logframes and proposals and donor requirements.

**Lot 3 (Monitoring and Evaluation**

We would welcome consultants with experience in one or more of the areas below:

* **DFID commercial tenders:** Preparation of MEL frameworks, payment-by-results plans and milestones, logical frames and overall support to programme design to ensure a strong MEL approach;
* **Grant proposals for DFID, DEVCO, Comic Relief, Big Lottery Fund:** Comprehensive experience leading the development of theories of change, logical frameworks and M&E frameworks.

All consultants will be expected to sign up to and adhere to AAUK Safeguarding Policy and Code of Ethical Business Conduct.

***Evaluation Methodology:*** The evaluation of each proposal will be based upon the following criteria:

|  |  |
| --- | --- |
| Criteria | Weighting - % |
| Depth of previous experience | 50% |
| Availability to work | 10% |
| Cost | 10% |
| Historical success rate in topic area/s (i.e. how many proposals created have been funded and ratio to overall proposals submitted) | 15% |
| Provided reference results | 15% |

***Shortlisting and Interviews***

Bidders who are able to meet ALL our Requirements will be invited to interview with a panel of ActionAid stakeholders. The purpose of the interview will be to answer any questions in relation to the proposed services and address any concerns which the panel may have arising from the proposals.

In the event that more than three bidders are able to meet all our Requirements, we reserve the right to invite no more than the three highest scoring suppliers to interview. We may invite less than three suppliers if the difference in scores is considerable; this is to avoid wasting the time of suppliers who are highly unlikely to be successful irrespective of the outcome of an interview.

After interviews, the initial proposal scores will be re-visited and adjusted in light of relevant information received at interview.

**Contract**

The contract will be for a period of 3 years, to be updated quarterly with new consultants. Any contract awarded will be on a non-exclusive basis. A copy of AAUK’s standard consultant and consultancy contracts’ terms are attached.

**Timetable**

The key indicative dates for this tender process are set out below. AAUK reserves the right to modify this timetable at any time. Any changes to the timetable will be communicated to all bidders who have expressed an interest in delivering the Services

|  |  |
| --- | --- |
| Process step | Date |
| RFP & Tender documents distributed to vendors | 15/08/2018 |
| Deadline for RFP responses  Note that any responses received after the quarterly deadlines will be considered in the next quarter’s review. | 02/09/2018, and then quarterly thereafter:  Q4 2018: 31/12/2018  Q1 2019: 31/03/2019  Q2 2019: 30/06/2019  Q3 2019: 30/09/2019  Q4 2019: 31/12/2019  Q1 2020: 31/03/2020  Q2 2020: 30/06/2020  Q3 2020: 30/09/2020  Q4 2020: 31/12/2020  Q1 2021: 31/03/2021  Q2 2021: 30/06/2021  Q3 2021: 30/09/2021 |
| Vendor interviews | 03/09/2018 – 07/09/2018, and then as needed each quarter |
| Selection of vendor/contract negotiation | w/c 9th September, and then quarterly thereafter |
| Contract begins | 14/09/2018, and then quarterly thereafter |

Any questions concerning aspects of the RFP’s requirements should be directed by e-mail only to Eve Mosley, Head of Business Development, IDPP ActionAid UK, [Eve.Mosley@actionaid.org](mailto:Eve.Mosley@actionaid.org), and/or Louise Sowden, Head of Research and Project Information, P&P, [Louise.Sowden@actionaid.org](mailto:Louise.Sowden@actionaid.org).

**Submitting your Proposal**

Bidders should complete the proposal using their own template. Please return a completed copy of the New Supplier Pre-Qualification Questionnaire and the completed proposal in response to the RFP to the PoC by the Deadline for Proposal Submissions.

Proposals should be clearly marked as: **Request for Proposal and Quotation: Programme Funding Consultant Framework**

Proposals will be accepted before the Deadline, but no Proposal will be considered if received after the Deadline unless there is evidence that the Proposal was delivered (such as email delivery or read receipt) or other extenuating circumstances, which it shall be at AAUK’s absolute discretion to reject.

**Point of Contact (PoC), Expressions of Interest, and RFP Process Queries**

The point of contact (PoC) for this tender process shall be:

Katherine Griffis, Contracts and Procurement Manager

The PoC can be contacted at the following email address:

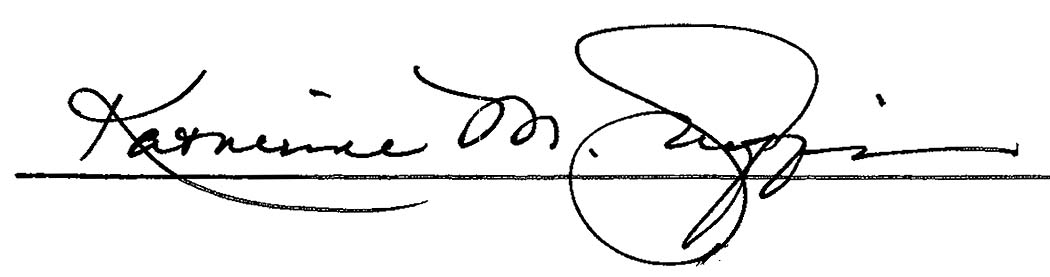
commercialuk@actionaid.org

Please submit expressions of interest (EoI) to the PoC. You are not required to submit an EoI as a pre-requisite to submitting a proposal, however, submitting an EoI will ensure that we are able to notify you of any changes to these documents, the process, or our Requirements.

In addition, any queries related to this process and our Requirements should be addressed to the PoC. The deadline for the receipt of any clarification questions is Thursday 30 August 2018.

We look forward to hearing from you.

Best wishes,



Katherine Griffis

Contracts and Procurement Manager