# CALL FOR PROPOSALS

## HUMANITARIAN INNOVATION FUND (HIF)

## ADOPTION LEARNING PARTNER

December 2023

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**elrha**

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# 1  Introduction

## 1.1  Overview of Elrha

We are Elrha. A global charity that finds solutions to complex humanitarian problems through research and innovation. We are an established actor in the humanitarian community, working in partnership with humanitarian organisations, researchers, innovators, and the private sector to tackle some of the most difficult challenges facing people all over the world.

We equip humanitarian responders with knowledge of what works, so that people affected by crises get the right help when they need it most. We have supported more than 200 world-class research studies and innovation projects, championing new ideas and different approaches to evidence what works in humanitarian response.

Our Programmes

Elrha has two successful humanitarian programmes; Research for Health in Humanitarian Crises (R2HC) and the Humanitarian Innovation Fund (HIF).

**R2HC:**
The R2HC programme aims to improve health outcomes for people affected by humanitarian crises by strengthening the evidence base for public health interventions.
This globally recognised research programme focuses on maximising the potential for public health research to bring about positive change in humanitarian response and helps inform decision making in humanitarian response. Since it was established in 2013, it has funded more than 50 research studies across a range of public health fields, bringing together researchers and humanitarian practitioners to undertake vital research.

**The HIF:**
The HIF programme improves outcomes for people affected by humanitarian crises by identifying, nurturing, and sharing more effective, scalable solutions.

The HIF is a globally recognised programme leading on the development and testing of innovation in the humanitarian system. Established in 2011, it was the first of its kind: an independent, grant-making programme open to the entire humanitarian community. It now leads the way in funding, supporting, and managing innovation at every stage of the process.

The HIF's portfolio of funded projects has informed a more detailed understanding of what successful innovation looks like, and what it can achieve for the humanitarian community. This work is leading the global conversation on innovation in humanitarian response.

Further information on Elrha and the work that we do is available from Home - Elrha.

## 1.2  Scope of the Adoption Learning Partner Procurement

**Background**

A significant portion of HIF's funded innovations are in the pilot stage of development and share a common challenge in progressing beyond this initial stage to achieve broader adoption and impact. Overcoming this challenge requires collaborative efforts beyond the individual innovation teams.

Recognising the need to address this bottleneck, the HIF has designed Adoption Challenges as a funding mechanism to strategically work with the *demand side* for new solutions: the potential adopters of innovation – operational humanitarian actors – rather than individual

innovators. The core objective of this mechanism is to incentivise and support humanitarian organisations to integrate effective innovations into their programming. The mechanism also seeks to facilitate the adaptation of these innovations to diverse settings and the subsequent evaluation of their effectiveness. By shifting the focus from innovators to adopting organisations, the Adoption Challenges aim to catalyse the scaling and integration of innovative solutions within the broader humanitarian sector to improve outcomes for people affected by crises.

We are currently running two Adoption Challenges. One aims to support the adoption of Water, Sanitation & Hygiene (WASH) innovations, while the other supports the adoption and scaling of humanitarian innovation in very high severity contexts. The WASH adoption Challenge grantees began implementation in 2023 and will finish mid-2024, whereas the Scale High Severity Challenge began implementation in late 2023 and will run for 12 months. Each challenge resulted in three grants:

| Challenge | Innovation | Adopter | Innovator | Location | Partners |
|---|---|---|---|---|---|
| WASH Challenge | Faircap Open Water Filter | Action Against Hunger UK | Faircap | Marandi & Tahoua, Niger + Afgooye, Somalia | Niger: Adkoul, Regional Directorate of Hydraulics and Sanitation (DRHA). Somalia: Juba Foundation (JF), Ministry of Energy and Water Resources (MOEWR) |
| WASH Challenge | Waterscope (Water quality testing kit) | Action Against Hunger UK | Waterscope | Sekota Woreda, Ethiopia & West-Pokot County, Kenya | Ethiopia: Organisation for Rehabilitation and Development in Amhara (ORDA). Kenya: Yangat |
| WASH Challenge | User-centered community engagement approach to design child-friendly WASH facilities | Village Education Resource Center (VERC) | Save the Children | Cox's Bazaar, Bangladesh | Village education Research Centre (VERC), Dhaka Bangladesh Save the Children UK Eclipse OXFAM |
| Scale in High Severity Challenge | Reemi (Menstrual hygiene pack) | Oxfam GB | Reemi | Mali, CAR, Somalia | Oxfam in Central African Republic Oxfam in Somalia Oxfam in Mali |
| Scale in High Severity Challenge | PM+ (Mental health diagnosis) | SOS Children's Village | WHO | Haiti | SOS Children's Villages Haiti SOS Children's Villages Italy |
| Scale in High Severity Challenge | uniMUAC (Malnutrition assessment) | Mercy Corp | MSF | Yemen | Mercy Corp Yemen |

As the grantees advance in implementing their grants, the HIF would like to strategically assess the effectiveness of scaling humanitarian innovation through partnerships between innovators and adoption partners, referred to in this document as scaling through adoption.

## Objectives

### Key research question:
### *Is adoption an effective strategy to scale up humanitarian innovations?*

The overarching objective of this Call for Proposals (CfP) is to commission an evaluation of the effectiveness of adoption as a scaling strategy for humanitarian innovation. Through delivery of the objectives below, we aspire to contribute substantively to the ongoing discourse

on humanitarian innovation, fostering a nuanced exploration of adoption's potential and challenges within the humanitarian sector.

**Objective 1: Evaluate existing grants**

To evaluate the overall progress of the six adoption grants in terms of what worked well and what were the enablers, in addition to what did not work well and what were the barriers. Prior to the start of their adoption journey, the grantees have identified success metrics or 'adoption thresholds' (a level of performance of the solution that they would consider sufficient to scale the innovation further). These metrics will be used to measure success of the adoption, scaling and implementation of the innovation. Grantees have been collecting primary data throughout their project to evaluate their progress against these thresholds.

We would like to go beyond surface-level observations to understand the technical intricacies that shape the success or hurdles encountered in the adoption process. We would also like to evaluate the selection and use of the metrics themselves. This involves:

- Evaluate grantees' progress compared to the pre-determined success metrics, the challenges they face, the benefits they deliver for the targeted beneficiaries, and any unfavourable outcomes that may have arisen along the way.
- The evaluation should extend to the ethical dimensions inherent in their adoption journey, contemplating the broader implications and responsibilities.
- Conduct a comparative analysis and synthesis to identify common trends, similarities, differences among the different grants.
- Assess sustainability to identify to what extent the adopter is likely to use the innovation beyond the grant's duration and scope.
- The evaluation may address the element of efficiency in implementation, flagging any potential good practices or notable inefficiencies.
- An assessment of the metrics selected, including level of ambition, validity (are we measuring the right thing), and efficiency and rigour of data collection practices.
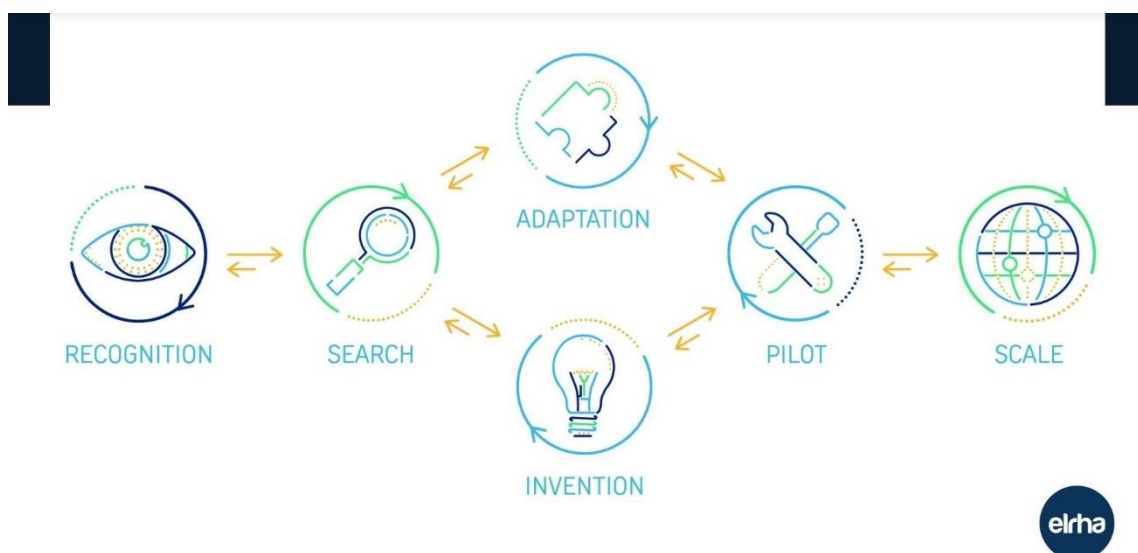


Figure 1: Stages of Innovation

**Objective 2: Evaluate the role of partnership**

Scaling innovation through adoption requires strong partnerships. We would like to dive deep into the complex partnership dynamics which develop and evolve between the different stakeholders involved, particularly the innovation teams and the adopters. This involves

scrutinising the collaborative frameworks and interactions that characterise these partnerships, discerning the ways in which they influence the overall innovation process.

In evaluating the role of partnerships, we place a particular emphasis on their impact on the effectiveness of adoption as a scaling strategy. This includes:

- A nuanced assessment of how these partnership dynamics could contribute to or, conversely, impede the scalability of innovative solutions within the humanitarian sector.
- Shed light on best practices, potential pitfalls, and the overall influence that collaborative relationships have on the success and sustainability of adoption strategies.
- Conduct a comparative analysis and synthesis to identify common trends, similarities, differences among the different partnerships in their relevant contexts.

This exploration aims to inform future collaborative endeavours, providing valuable insights that contribute to the strategic refinement of partnerships as an integral component of the scaling process in humanitarian innovation.

## Objective 3: Recommendations for humanitarian innovation programming

Learning from the experience of our grantees. We would like to translate the nuanced understanding of the position that scaling through adoption occupies within the broader spectrum of humanitarian innovation scaling into actionable recommendations. Through analysing the evaluation outcomes (finding of objectives 1 and 2), we would like to identify specific areas in the humanitarian sector's programming where enhancements can be made. These recommendations shall be designed to be pragmatic, offering tangible and implementable changes that can be integrated into existing practice.

## Objective 4: Inform and engage

To plan and implement a suitable dissemination plan that reflects the depth and breadth of the learning outcomes. We recommend leveraging a range of channels to keep the HIF team informed, and to engage a wide array of stakeholders effectively. As well, we recommend that any plan of convening event to aim for creating a dynamic and inclusive dialogue between the multiple actors in the humanitarian sector. Such actors may include donors, cluster coordinators, lead agencies, local programme coordinators, practitioners, field implementers, and academics.

## Activities

Activities for objective 1 – Evaluate existing grants:

a. Documents review and data synthesis:
Scrutinise project documents, including progress reports, documented findings and impact assessments. Assess the alignment of actual progress with initial plans, identifying any deviations and the reasons behind them. The consultant is responsible for gathering the existing data which grantees collected and working with the grantees to identify the appropriate methods to fill the gaps within time and budget, in close coordination with the HIF team and the grantees.

b. Data triangulation:
Engage with key stakeholders, including representatives and partners from each grant, through key informant interviews. We expect a minimum of five engagements per grant, including at least 2 stakeholders external to the project team. Those engagements should capture diverse perspectives on impacts, challenges, and overall progress of the adoption initiatives to complement the data sets the grantees provide.

c. Ethical review:
Engage with project teams in reflective discussions on the ethical dimensions of their work. Explore the perceived ethical implications, unintended consequences, and the measures in place to mitigate potential ethical challenges. As well, the consultant is expected to manage ethical issues that may arise when carrying out their activities. We suggest the use of Elrha's Ethics Toolkit to facilitate these discussions.

We expect the consultant to reflect on non-discrimination and inclusion: Who benefited during the adoption of this innovation and who is excluded, and why? Taking into consideration intersecting identities, are there any barriers facing specific sub-groups, including women and girls, people with disabilities and older people, or other characteristics that prevent them from fully benefiting from this innovation? To what extent these challenges were due to the design of the innovation, or they came up based on the specific adoption context?

d. Adoption thresholds analysis:
Identify and analyse the adoption thresholds outlined in the project plans. Evaluate the efficiency of implementation by comparing what was achieved against the plan. As grantees have different adoption thresholds, it will be helpful to do a meta-analysis across grants to evaluate the validity of what the grantees are measuring (are they measuring the "right things"?), as well as what they are not measuring.

If appropriate, an element of cost-benefit analysis to assess the economic efficiency of the projects may be considered (to evaluate the benefits delivered for targeted beneficiaries in relation to the resources invested). Finally, if applicable, map out the implementation processes of each grantee to identify potential inefficiencies through conducting efficiency analysis to pinpoint areas for improvement and recommend streamlined approaches.

Activities for objective 2 – Evaluate the role of partnership:

a. Stakeholder mapping and network analysis:
Identify and map out all stakeholders involved in partnership, including inventors/adaptors, adopters, and any other relevant actors. Understand the roles, interests, and expectations of each stakeholder using network analysis techniques, or similar, to visualise and analyse the relationships between stakeholders. Identify key influencers, information flow patterns, and potential bottlenecks in the partnership network.

b. Consultations:
Conduct interviews with the identified key stakeholders to explore their perspectives on the partnership dynamics. Use focus group discussions to facilitate interactions and gather collective insights. We are expecting the consultant to use the same time and resources used in activity (b) of objective 1. The consultant may develop and administer a survey to stakeholders, if appropriate, to collect data and gauge their satisfaction with the current partnership dynamics.

c. Collaborative framework assessment:
Analyse partnership agreements, MoUs, and other relevant documents to understand the formal structures and expectations set forth in the collaborations.
Evaluate the existing collaborative frameworks, examining how roles and responsibilities are distributed among partners. Assess the clarity of communication channels and decision-making processes.

d. Impact assessment:
Evaluate the impact of partnership dynamics on the scalability of innovative solutions. Examine how collaborative relationships contribute to or hinder the adoption process and

scalability of innovations within the humanitarian sector. As well, support grantees, if needed, to identify difficulties in existing partnerships and to develop mitigation strategies for future adoption opportunities.

e. Case studies of successful partnerships:
Document at least one brief (1-2 pages) case study of successful partnership. Analyse the factors contributing to their success and extract lessons learnt and best practices. The case studies will be part of the full report (objective 3, activity b).

Activities for objective 3 – Recommendations:

a. Synthesis workshop:
Organise an online workshop with key stakeholders, including the grantees, relevant partners, the HIF team, and experts in humanitarian innovation (e.g., members of Elrha's WASH Technical Working Group). Facilitate discussions to synthesise objectives 1 and 2 findings and identify overarching themes. Collect post-session feedback from the participants about the synthesised outputs.
If the recommendations are extensive, we recommend carrying out a prioritisation exercise in the session to determine which recommendations carry the most significant impact and feasibility.

b. Report production:
Produce a summary report (no more than 25 pages) that consolidates the methodologies, progress, findings, evidence, case studies, and recommendations derived from this work. The main purpose of this report is for internal consumption at Elrha; however, some parts may be selected for sharing publicly (e.g., the case studies). Additionally, the consultant is requested to create a distinct executive summary for external publication that emphasises recommendations for potential humanitarian innovation funders.

Activities for objective 4 – Inform and engage:

a. Dissemination planning
Work with the HIF team to identify and analyse key stakeholders within the humanitarian sector who would benefit from or contribute to the project findings. Evaluate various communication channels (e.g., reports, articles, social media, webinars, conferences) to determine the most effective ways to disseminate the findings.

b. Conduct at least two dissemination activities. A third activity is advisable is time and budget allow. Suggestions of such activities may include (we are open for suggestions):
   • Webinars and virtual conferences: organise webinars or virtual conferences to present the findings and engage with stakeholders in real-time. Facilitate Q&A sessions to encourage active participation.

   • Peer-reviewed paper: produce an article addressing the research question about the effectiveness of scaling through adoption with focus on the element of partnership.

   • Knowledge sharing platforms: Publish findings on knowledge-sharing platforms, such as online forums, research repositories, or humanitarian databases, to ensure accessibility for a wider audience.

   • Present findings in the Humanitarian Innovation Forum planned in November 2024.

   Remark: the consultant is expected to tailor dissemination methods to consider the localised contexts. Engage with local organisations and communities to ensure relevance and cultural sensitivity in communication.

c. Feedback mechanism:

Establish a feedback mechanism, such as surveys or dedicated email channels, to gather responses and insights from stakeholders in response to the findings. Use this feedback to refine your dissemination strategies.

d. Documentation and reporting:
Create documentation of the dissemination process, including a summary of activities, feedback received, and lessons learned. This will inform future projects and enhance the effectiveness of dissemination strategies.

## Key Deliverables

| No. | Deliverable | Description | Completion Date |
|-----|-------------|-------------|-----------------|
| 1 | Kick-off meeting | Meet with Elrha's Innovation Managers | March 2024 |
| 2 | Inception report and presentation to the HIF team | Final detailed scope, method and approach. The report will include detailed budget and workplan (to be approved by Elrha) as well as suggestions/preference for the three dissemination activities. | April 2024 |
| 3 | Consultation outcomes presentation | Present to the HIF team about the consultations' key findings (objective 1 - activity (a) and objective 2 - activity (b)). This should also include the main conclusions of the conducted reviews (objective 1 - activities (b) and (c)). | June 2024 |
| 4 | Adoption thresholds analysis | Produce a brief outlining analysis of preliminary findings (objective 1 - activity (d)). | June 2024/ |
| 5 | Partnership assessment presentation | Present to the HIF team about the partnership assessment key findings (objective 2 - activity (a) to (d)), including a clear structure of the case study (objective 2 - activity (e)) | July/August 2024 |
| 6 | Synthesis workshop | Organise a workshop to synthesis the recommendation and gather feedback as explained in objective 3 - activity (a). | September 2024 |
| 7 | Recommendations presentation | Present to the HIF team about the outcomes of objective 3 activities (a) and (b) | October 2024 |
| 8 | Refinement | Refine the preliminary analysis and recommendations considering the additional inputs from Scale in High Severity Challenge grantees | November 2024 |
| 8 | Humanitarian innovation forum (optional) | Present preliminary findings in the innovation forum | November 2024 |

| 8 | Recommendation Executive summary | Produce an executive summary targeting the humanitarian innovation actors outlining the key recommendations to integrate scaling through adoption into the humanitarian innovation programming. | January 2025 |
|---|---|---|---|
| 9 | Full report draft | Produce the first draft of the comprehensive report (objective 3 - activity (b)) and share with the HIF team for review. | January 2025 |
| 10 | Full report | Produce the comprehensive report's final version (objective 3 - activity (b)) based on the review received. | February 2025 |
| 11 | Dissemination plan presentation | Present to the HIF team about the details of the dissemination plan (objective 4 – activity (a)). | September 2024 |
| 12 | Dissemination activity 1 | Deliver the first dissemination activity. | September 2024 – January 2025 |
| 13 | Dissemination activity 2 | Deliver the second dissemination activity. | |
| 14 | Dissemination activity 3 (optional) | Deliver the third dissemination activity if time and budget allow. | |
| 15 | Dissemination activities brief | Produce a brief outlining the main dissemination outcomes (objective 4 – activity (d)). | February 2025 |

## 2   Instructions for Submitting a Proposal

### 2.1   Indicative Procurement Timetable

| | Task | Date |
|---|---|---|
| **1** | Call for Proposal (CFP) issued | 18 December 2023 |
| **2** | Deadline for return of Proposals | 24 January 2024 |
| **3** | Evaluation of Proposals | Completed by 29 January 2024 |
| **4** | Expected dates for interviews with short listed bidders (if applicable) | 30-31 January 2024 |
| **5** | Contract awarded (pending due diligence and contracting) | 01-02 February 2024 |
| **6** | Due diligence and contracting | 02 February to 08 March 2024 |
| **7** | Contract start | 08 March 2024 |

**Elrha reserves the right to amend the procurement timetable.**

## 2.2  General Call For Proposals Information

2.2.1  These instructions are issued to ensure that all received Proposals are given equal and fair consideration. It is important therefore that bidders provide all information asked for in the format and order specified in this CFP. If the bidder has any doubts as to what is required or has difficulty in providing the information requested, please direct these by email to contracts@elrha.org OR hif@elrha.org, putting the title of the contract as the subject.

2.2.2  Proposals shall be submitted in accordance with these instructions and, save as may be allowed elsewhere in the issued document, without alterations or qualifications.

2.2.3  Proposals that do not comply with any mandatory requirement (i.e., where the words "shall" or "must" are used) will not be considered.

2.2.4  This CFP does not constitute an offer and Elrha does not bind itself to accept any Proposal. Elrha reserves the right to accept a Proposal in part, rather than in full and Elrha reserves the right and to award a Contract to more than one bidder.

## 2.3  Issued Documents

2.3.1  Apart from the formal Contract between Elrha and the successful bidder arising from Elrha's written acceptance of proposal, the following documents referred to in these Instructions as the incorporated documents forming the contract will comprise:
- These Instructions
- The Proposal Form to be completed by the bidder
- Non-collusive Proposal Certificate to be signed by the bidder
- The Terms and Conditions
- The Specifications
- Response Documents and Schedules

## 2.4  Confidential Nature of Call for Proposal Documentation

2.4.1  Documentation in relation to this CFP and any Proposals received by Elrha in response to it shall be treated as private and confidential save where the disclosure is required by law.

2.3.2  Bidders shall not:

- Disclose that they have been invited to submit a proposal;
- Release any information relating to the CFP or the Proposal that they intend to make; other than with professional advisers who need to be consulted with regards to the preparation of the Proposal;
- Canvass directly or indirectly with any other bidder concerning the CFP;
- Canvass directly or indirectly with staff of Elrha (including its trustees, volunteers, and contractors) concerning the award of the contract or who has directly or indirectly obtained or attempted to obtain information from the said individuals.

## 2.5  Preparation of Proposal

2.5.1  No alteration or addition shall be made by bidders to any part of the CFP except where expressly allowed herein or in the other issued documents.

2.5.2  Proposals shall not be subject to any pre-condition or otherwise qualified or

accompanied by statements which might be construed as rendering the Proposal equivocal. Only unconditional Proposals will be considered. Elrha's decision as to whether or not a submitted Proposal is in an acceptable form will be final.

2.5.3   A fully compliant Proposal must be submitted. Where a bidder wishes to submit a modified or alternative Proposal this must be in addition, and submitted separately, to the compliant Proposal and may or may not be considered by Elrha. Any modified or alternative Proposal must also be free of qualifications, fully priced and complete.

2.5.4   Bidders must obtain for themselves at their own responsibility and expense all information necessary for the preparation of their Proposal. Information supplied to bidders by Elrha is supplied only for general guidance in the preparation of the Proposal and no warranty is given, unless specified elsewhere in the issued documents to its accuracy. Bidders are strongly advised to satisfy themselves by their own investigations as to the accuracy of such information and no responsibility is accepted by Elrha for any loss or damage of whatever kind or howsoever caused arising from the use by bidders of such information.

2.5.5   Proposals and supporting documents shall be in English and any Contract subsequently entered into and its formation, interpretation and performance shall be subject to and in accordance with the law of England.

## 2.6   Call for Proposal Response

2.6.1   Section 1-6 and Appendix 1 of this document set out the base information needed to understand Elrha's requirements (**The Specification**).

2.6.2   Section 7 and Schedules 1 and 2 (**Response Documents**) are where the bidder is asked to respond directly to requirements and set out their proposal and associated assumptions and conditions. All bidders are requested to use the forms and follow the formats set out in Sections 7 and Schedules 1 and 2 when preparing their responses. Please be clear, succinct, and unambiguous in all narrative responses.

2.6.3   Where necessary, you should attach supporting documents with the Proposal marking clearly your organisation's name and the number of the response that the document supports. Cross-referencing is permitted, i.e., you can reference the same piece of supporting material as evidence for more than one question.

2.6.4   The complete Proposal submission must be supplied in electronic format. The Response Documents must not be saved in PDF format (with the exception of the forms that require the bidder's authorised signature and supporting information such as copies of policy documents, certificates or operating procedures) and Elrha must be able to edit the Word and Excel forms submitted. Electronic files must be set out and named in such a way that Elrha evaluators can easily find the information relation to each question in Section 7.

2.6.5   **Proposals must be emailed to [hif@elrha.org](mailto:hif@elrha.org) with the subject line: "Adoption Learning Partner – [Your Organisation]". Proposals emailed to any other Elrha email address will not be considered.**

2.6.6   In order to evaluate the Proposal all required Response Documents must be included with the Proposal. If any of the required documents are not submitted with the Proposal, Elrha reserves to itself the right to reject such Proposal.

2.6.7   All Proposals shall be delivered not later than **24 January 2024 at 1pm GMT**.

2.6.8   It is the bidder's responsibility to ensure that their Proposal arrives in accordance with these Instructions. Proposals received after the date and time for delivery will not be considered.

2.6.9   Elrha reserves the right to reject any proposal that fails to comply fully with the Instructions for Proposals set out in this Section 2, or that makes any misrepresentation in supplying any information requested.

## 2.7   Questions

2.7.1   Bidders will have the opportunity to ask questions by e-mail to Elrha at contracts@elrha.org OR hif@elrha.org. Elrha will use best endeavours to provide such explanation as a matter of assistance to the bidder, but it shall not be construed to add to modify or take away from the meaning and intent of the proposed contract and or the obligations and liabilities of the bidder.

2.7.2   No representation, explanation or statement made to the bidder or anyone else by or on behalf, or purportedly on behalf of Elrha as to the meaning of the CFP documents, or otherwise in explanation as aforesaid, shall be binding on Elrha in the exercise of its obligations under a subsequently awarded contract.

2.7.3   Where the enquiry is beneficial to all bidders, both the original enquiry and the response will be sent to the other bidders anonymously.

# 3   Appraisal of proposals

## 3.1   Evaluation

3.1.1   Elrha is committed to ensuring its resources are used as efficiently as possible, in order that it can focus them on achieving maximum impact for children. Proposals will therefore be evaluated against the criteria set out below.

3.1.2   Bidders must provide information, which demonstrates and supports their understanding of, and ability to meet, the Specification contained within this document.

3.1.3   Bidders who submit a Proposal with arithmetical errors leading to a revised Proposal sum when the errors are corrected will be given the opportunity to accept the revised Proposal sum or withdraw the Proposal. A Proposal containing major arithmetical errors, or a large number of arithmetical errors may be rejected on the ground that there is serious doubt about the competence of the bidder.

## 3.2   Elrha Not Bound

3.2.1   Elrha will consider the bidder's Proposal on the basis of obtaining the best value for money having regard to the pre-defined evaluation criteria.

3.2.2   Elrha does not bind itself to accept the lowest priced or any Proposal.

## 3.3   Evaluation Criteria

3.3.1   The following criteria are those on which Elrha will evaluate the Proposals and base its Contract award decision:

| 1. General company information OR Eligibility Screening and review of Due Diligence Questionnaire | Pass / Fail |
| --- | --- |

| 2. Quality Criteria | Weighting |
|---|---|
| • Approach and methodology (extent to which the proposal adheres to the objectives, methodology, guiding principles and ethics requirements set out in the scope of work – sub-section 1.2) | **40%** |
| • Evidence of applicant's experience of having provided services similar to those required by Elrha (within not-for-profit sector) as detailed in **sub-section 3.4**.<br>• The experience and qualifications of the proposed team as detailed in **sub-section 3.4**. | **30%** |
| **3. Cost** | |
| • Days and day rates to complete all activities<br>• Costs of translation/interpretation associated with conducting any research activity | **30%** |
| **Total** | **100%** |

3.3.2 Bidders' responses in Section 7 should directly answer the question and provide clear and concise answers which directly evidence the bidder's understanding of and ability to meet the Specification of Service Requirements. Do not feel that providing more wording and complex answers will enhance your score.

3.3.3 Proposals will be scored by a cross functional evaluation panel.

## 3.4 Quality Evaluations

- Personnel/Team qualifications:
  - Experience in conducting monitoring, evaluation and learning projects (essential)
  - Experience in working with international projects in the development and/or humanitarian sectors (essential)
  - Experience in designing and implementing thorough research methods (essential)
  - Experience managing ethical issues in research, developing effective strategies for mitigating ethical issues, including ethical approvals, approaches to informed consent, and data management.
- Sector experience
  - Experience in working with organisations that are active in humanitarian settings (essential)
  - Experience in working with WASH projects and/or innovation projects aiming to scale (preferred)
  - Experience in working with projects working in high severity settings (preferred)
- Evidence of similar work/publications

In evaluating the quality element of the Proposals, each criterion shown above and reflected in the response documents will be awarded an evaluated mark in accordance with the following table:

| 0 Points | Wholly unsatisfactory, fails to demonstrably meet specified requirements or not answered. |
|---|---|

| 1 Point | Poor, only partially demonstrably meets specified requirements. |
|---------|------------------------------------------------------------------|
| 2 Points | Satisfactory, demonstrably meets specified requirements in full. |
| 3 Points | Good, demonstrably exceeds the specified requirements and provides significant added value to Elrha. |

### 3.5 Cost Evaluations

3.5.1 Cost evaluation will take into account the cost to deliver the required service for the duration of the contract.

3.5.2 The lowest cost proposal to a bid of acceptable quality for the work will be awarded full marks. The more expensive proposals will be ranked and scored in direct proportion to how much more expensive they are than the lowest cost acceptable quality bid.

## 4 Contract Award

4.1 At the conclusion of the evaluation process and subject to the provisos contained in these instructions, Elrha will decide to whom the Contract will be awarded, and the successful bidder will be expected to enter into a formal agreement. Elrha's letter of acceptance together with the documents stated in paragraph 2.3.1 above and all other documents jointly agreed by Elrha and the bidder as being included, will form the Contract between the successful bidder and Elrha.

4.2 Acceptance of the Proposal shall only be signified in writing from Elrha Procurement and no other purported method of acceptance, (i.e., Telephone call, correspondence from any other Elrha staff) shall be binding on Elrha. In addition, any action on the part of the successful bidder shall be of no contractual effect and not binding on Elrha without an acceptance letter from Elrha being issued to the bidder.

4.3 The formal contract agreement will be in a form prepared by Elrha.

## 5 Conflicts of Interest

5.1 In order to ensure a fair and competitive procurement process, Elrha requires that all actual or potential conflicts of interest are identified and resolved to Elrha's satisfaction.

5.2 Bidders should notify Elrha in writing of any actual or potential conflicts of interest in their response to this CFP. If the bidder becomes aware of an actual or potential conflict of interest following submission of this CFP it should immediately notify Elrha in writing providing details of such actual or potential conflict of interest.

5.3 Without limitation, Elrha may perceive conflicts of interest to arise where a bidder or their sub-contractors proposes to provide services or advice to, or is otherwise connected with, more than one bidder in relation to this CFP; and/or a bidder or their sub-contractors or any person employed or engaged by or otherwise connected with bidder or their sub-contractors, or the spouse or partner of such person, is or has within the last two years been engaged or employed by, or is currently discussing matters relevant to this CFP, with Elrha or has within the last two years been engaged or employed by, or otherwise connected with Elrha.

5.4     Elrha reserves the right to exclude bidders from the procurement process should actual or potential conflicts of interest be found to confer an unfair competitive advantage on one or more bidder or to otherwise undermine a fair and competitive procurement process and, following consultation with the bidder, such actual or potential conflicts are not resolved to the satisfaction of Elrha.

# 6    Ways of Working

Elrha requires the successful provider to adopt an agile and collaborative approach to working with Elrha and remain accessible to Elrha throughout delivery.

Elrha requires a provider that is aligned with Elrha, accessible and effectively resourced throughout the programme phases, providing the additional skills and capabilities Elrha needs to deliver effectively.

The successful provider shall transfer all documentation and findings to Elrha in a professional and timely manner.

Delivery of the objectives will be managed following an approach adapted from Agile Project Management to offer the highest possible levels of flexibility and collaboration through iterative based dynamics. The main reasons to use this approach are:

- Uncertainty and complexity: although the scope is clear, this project involves a degree of uncertainty and complexity. An iterative and flexible approach allows both the involved parties to adapt to changing circumstances and outcomes.

- Continuous Learning: agile encourages regular reflection and adaptation, which aligns with this work's iterative nature. This will allow for adjusting expectations based on the findings of each objective before proceeding to the next.

- Collaboration: Agile encourages collaboration among the various involved parties, fostering a culture of shared responsibility.

- Documentation: Agile practices include documentation that captures essential information. This is advantageous to document methods, findings, and results.

# 7    Response Documents

Please include the following information in your Proposal.

## 7.1   General Company Information

Please complete the Supplier Questionnaire and [if applicable; Data Security Questionnaire] attached in Schedule 1.

## 7.2   Quality and Technical Capability

a)  Evidence your experience of having provided services similar to those required by Elrha (within not-for-profit organisations if possible), covering where relevant the required and desirable experience.
b)  Set out the approach for how you would deliver adoption learning partner role. Please describe:
- Work stages that would need to be undertaken (please include a workplan).
- The information and resource you would require from Elrha.
- Your approach to how you would undertake the activities and produce

- deliverables.
- Any dependencies or assumptions you have made.

## 7.3   Ways of Working

a) Set out the structure of the team you would propose for delivering the work, including an organogram showing both supplier and Elrha roles with a description of the key roles and responsibilities.

b) Provide a brief resume of the key staff that you would propose to deploy onto this contract, evidencing their experience in successfully providing services similar to those required by Elrha.

c) Please set out how you would manage this contract and your escalation process.

## 7.4   Cost

The prices and rates quoted shall be the fully inclusive value of the services, **excluding VAT**, including all costs and expenses which may be required to provide the complete services together with all general risks, liabilities and obligations, set out or implied, necessary to comply with the CFP conditions, the conditions of Contract, the Specification, all Schedules and Appendices there to.

In order for bids to be compared bidders must follow the format of the attached Schedule 2. Additional rows and columns may be added where necessary, although bidders should ensure any calculations are amended accordingly.

Additional pricing breakdowns may be appended in support of quoted costs.

**Please note that only proposals under £35,000 including VAT will be considered.**

All prices should be in GBP.

7.3.1   In the attached Schedule 2, please provide your proposed costs for the required activities as detailed in sub-section 1.2.

7.3.2   Please indicate whether your proposal is fixed price.

7.3.6   Please set out any clarifications or assumptions that relate to your proposed costs.

7.3.7   If there are any additional costs that Elrha may be liable for that you have set out in Schedule 2, please provide further details.

7.3.9   Elrha is committed to reducing the charity's operating costs so that maximum resource can be spent on programmes which directly benefit people affected by crises.

Should you be willing to provide any element of the service on a pro bono basis, offer a cost reduction, service enhancement or any other charitable support to the organisation, please set out your proposal.

# 8  CFP Response document – Proposal Form for the Adoption Learning Partner Contract

I/We having carefully examined and considered without limitation, the **Specification** and **Terms and Conditions**, the **Instructions for Submitting a Proposal**, the Budget Breakdown (Model Financial Offer) (**Schedule 2**) and the other issued documents and in consideration of Elrha considering this CFP, we offer to provide the services required to meet the Specification and other issued documents including the terms and conditions for the price specified in the attached pricing schedule.

We further confirm that We are able to provide the services as required by the Specification.

We confirm that, if our Proposal is accepted, we will upon demand:

- Produce written evidence that the relevant insurances and compliance certificates with relevant legislation and policy are held and are in force and will remain in force for the duration of the intended Contract; and

- Execute and deliver the necessary contract documents to Elrha.

We agree that this Proposal shall constitute an irrevocable, unconditional offer which may not be withdrawn for a period of six (6) months from the date of this Proposal.

We agree that Elrha's Letter of Acceptance and our acknowledgement shall constitute a binding contract between us and Elrha. We further acknowledge Elrha require us to enter into an agreement in a form prepared by Elrha.

We understand that Elrha is not bound to accept any Proposal that it receives.

Signed for the Proposal:

Name: ………………………………………………………………………………………..

Title: ……………………………………………………………………………………….

Organisation: ………………………………………………………………………………

Date: ………………………………………………….

## 9 Non-collusive Proposal certificate for the Adoption Learning Partner contract

Bidders are required to certify their Proposal in the following terms (the certificate should be signed by the same individual(s) who signed the Proposal Form):

We certify that this is a bona fide Proposal, intended to be competitive and that we have not (either personally or by anyone acting on our behalf):

- Fixed the amount of the Proposal (or the rate or prices quoted) by agreement with any other person, company, or Organisation/Individual.

- Communicated to anyone, other than Elrha, the amount or approximate amount or terms of our Proposal (other than in confidence in order to obtain quotations, professional advice or insurance necessary for the preparation of the Proposal).

- Entered into any agreement or arrangement with any other person, company, or Organisation/Individual that they shall refrain from bidding or as to the amount of or terms of any Proposal to be submitted by them.

- Canvassed or solicited any employee, trustee, or agent of Elrha in connection with the award of this or any other contract with or tender to Elrha.

- Offered, given, or agreed to give any inducement or reward in respect of this or any other contract with or tender to Elrha.

Signed for the Proposal:

Name: ………………………………………………………………………………………………………………

Title: ………………………………………………………………………………………………………………

Organisation: …………………………………………………………………………………………………..

Date: ………………………………………………………

## 10 Terms and Conditions for Adoption Learning Partner contract

Bidders are required to indicate whether they accept the Terms and Conditions, (sent with this Attached at Appendix 1), or whether there are any clauses in the Terms and Conditions which they would invite Elrha to consider. It is crucial that bidders identify any significant contract issues and make alternative suggestions as appropriate. Please note that if a bidder's submission contains Conditions of Contract different to those contained in this Call the submission may be deemed non-conforming.

A form appears below which should be used as a model for such indications (if any):

"To Elrha"

We accept the Terms and Conditions

*or*

We would invite Elrha to consider revising the following items in the contract terms and conditions as indicated below:

| Clause Number | Concerning | Suggested Revision |
|---|---|---|
|  |  |  |
|  |  |  |
|  |  |  |

Signed for the bidder:

Name: ………………………………………………………………………………………………….

Title: …………………………………………………………………………………………………

Organisation: …………………………………………………………………………………………..

Date: …………………………………………………………