

**REQUEST FOR PROPOSAL
No. [HPI20221027]**

Heifer Project Management Manual and Professional Development Courses

RFP Release Date:	October 11, 2021
Performance Period:	6-9 months
Non-disclosure Submission Deadline:	October 15 2021 5:00pm Central Standard Time
Proposal Submission Deadline:	October 27, 2021 12:00pm Central Standard Time
Electronic submission to the attention of:	Alyssa Ivaska, IPMS, Business Process Coordinator
Electronic submission:	Procurement@Heifer.org

Contents

General Information..... 2

Background and Need..... 2

Scope of Work 3

Required Expertise..... 4

Proposal submission requirements:..... 4

Selection Criteria 5

Award Process and Contract Mechanism 6

Validity of Proposals..... 6

Limitations 6

Whistleblower 6

Other Contract Requirements..... 7

Applicable Regulations 7

 Annex A. Non-Disclosure Agreement 8

 Annex B. The minimum standards for project lifecycle and key actions. 10

General Information

Heifer Project International (Heifer) is a global non-profit development organization working to end hunger and poverty while caring for the earth, in partnership with the communities we serve. Heifer works in Africa, Asia and the Americas supporting small entrepreneurs, engaging with local partners and stakeholders and creating lasting change from the ground up. We use sustainable practices when engaging with smallholder farmers in agricultural development to facilitate processes where families and their communities reach a living income.

Heifer is expanding the scope, scale and impact of its work to empower the most vulnerable small holder farmers who most of the times have minimum resources for farming by enabling access to markets and strengthening the markets they are operating in alongside their Social Capital Development. Heifer achieves its objective by implementing its projects in collaboration with partner organizations such as Donor Agencies, Foundations, Private Sector Partners and Host Government Institutions.

This document contains the requirements for procuring a Bidder to propose a solution for developing Heifer's Global Project Management Manual and Professional Development Courses.

Background and Need

In pursuit of achieving its goals, Heifer is developing an Integrated Program Management System (IPMS), a cloud-based system operationalizing business for program and project management. The goal of IPMS, using a customized version of NGO Online, is to provide project managers with real-time data and information that project leadership needs to make decisions for optimum impact and will help organize, compile, store, report and visualize the impact of projects and programs across Heifer's portfolio. The IPMS also encompasses Heifer's data collection platform, SurveyCTO, and our Azure database. Additionally, IPMS has the capability to store resources and tools; therefore, it is expected that IPMS will host the tools for effective and efficient project management.

A few years ago, Heifer adopted PMD Pro, recently updated to Project D Pro, as the methodology to manage projects; however, each Program Area achieved various levels of adaptation and adoption, and overall, there is limited standardization for project management. Building on previous work Heifer has various pieces of business process functions in operation across the project life cycle and knows there are gaps and misalignment with Project D Pro.

To ensure effective alignment between business functions and systems, Heifer is seeking technical expertise to review and assess all current business processes, identify the gaps in the business processes and work collaboratively with Heifer to develop a dynamic and interactive project management manual with online learning tools. The selected vendor will work with Heifer to ensure business processes for project management are clearly described and exemplified. This may require meeting with various teams to document clearly what project management is at Heifer and a review of what is already in place. This work includes ensuring that the manual is fully aligned with Project D Pro methodology, all management functions for project management, IPMS and other software currently used for project management. The online manual and learning tools will standardize project management business processes across the organization. It should be dynamic, interactive and user- focused/friendly.

Specific Objective

To develop a user-focused, interactive, dynamic, and web-based project management manual with online learning modules and user-friendly features.

The final products will be Heifer own, the training modules should be compatible with SCORM 1.2

Scope of Work

It is expected that this assignment will have two overlapping phases:

Phase 1: Project management manual development, and

Phase 2: Develop Heifer owned professional online learning courses (compatible with SCORM 1.2)

Also, it is expected that Heifer will award a one-year *Fixed Price Deliverable-based Contract*.

Table 1: Proposed tasks and deliverable(s) schedule:

No.	Tasks	Deliverable(s)	Responsible
1.0	Review and assess all current project management business policies, processes, guidance and tools and documents in a succinct order following Project D Pro methodology, starting from project setup to project closure. Organize into a one-stop shop (i.e., compliance, HR, finance/administration, etc.), easy –to understand document with actions per project life cycle stage.	1. Outline for the manual	1. Bidder
1.1	Identify gaps and duplications within Heifer’s project management business processes, and propose solutions based on industry standards. Then, work with Heifer project manager on a plan for drafting and completing those gaps.	1. Gap Analysis Report	1. Bidder
1.2	Bidder to present the gap analysis to the IPMS Core Group.	1. Presentation	1. Bidder
2.0	Based on all the information provided, a draft of Heifer project management and operations manual.	1. First draft of Project management manual	1. Bidder
2.1	Review and incorporate Heifer’s feedback into the manual. This may go through several rounds of feedback or may require facilitating meetings with different stakeholders within Heifer to ensure approval.	1. Feedback provided in a timely manner 2. Incorporated feedback 3. Approved manual	1. Heifer 2. Bidder 3. Heifer
2.2	Translate the manual into French and Spanish.	1. Approved translation	1. Bidder 2. Heifer
3.0	Advise and collaborate with Heifer in aligning the business rules within the project management system that reflect the project management manual. This will require integration between the business processes for project management and IPMS.	1. List of business rules per project phase	1. Bidder 2. Heifer
4.0	Based on the approved manual, propose an outline for online learning modules and a suggested learning platform/course structure.	1. Online Course Outline with a clear learning pathway	1. Bidder
4.1	Create a self-paced professional development course for online learning with all accompanying instructional and training materials. Creativity and innovation of the bidder is appreciated. Offline or low bandwidth capabilities required; mobile/tablet friendliness preferred.	1. Online Courses with a menu of modules, aligned to Heifer manual	1. Bidder
4.2	Test the course for effectiveness and modify based on feedback.	1. User Testing 2. Incorporate feedback	1. Heifer 2. Bidder
4.3	Translate the courses into Spanish and French languages.	1. Course Translations completed and shared	1. Bidder

Relationship and Responsibilities

The Bidder will keep Heifer informed of the progress during the implementation via a mutually agreed upon timeframe. The Bidder may directly address all inquiries and communication to the assigned Heifer Project Manager.

Required Expertise

Experience and reliability of the bidder or bidder's organization are considered in the evaluation process. Due to the complexity of the task, the bidder should have deep knowledge of project management business processes, can analyze those processes in a holistic and integrated way and recommend viable cost-effective inputs that improve project operations and lower administrative and operational burdens for staff.

The Bidder is advised to submit the following information:

- a) Evidence of the capacity and capability to perform the work as outlined in the business requirements, including the types of services the bidder or the bidder's firm is particularly qualified to perform.
- b) Contact person(s) in at least three (3) organizations who have employed your services for projects of the nature and scope as outlined in RFP.
- c) Available time commitment and staffing to complete the SOW within less than 1 year from contract signing.
- d) The address from which services will be provided to complete the assignment as described in this RFP.

Required expertise:

- a) Detail-oriented, clear communication and responsiveness and persistence in delivering on time and to a high degree of quality.
- b) Expertise with project management, preferably PMD Pro (Program D Pro and Project D Pro) methodology.
- c) Strong interpersonal communication skills, both verbal and written, with diverse multicultural teams.
- d) User and customer-focused, to be able to meet Heifer needs.
- e) Eagerness to jump into a complex work environment with multicultural teams across different time zones.
- f) Demonstrated proficiency in English, both oral and written; Spanish and French is desirable.
- g) Knowledge of project management systems functionality; familiarity with NGO Online will be a plus.

Proposal submission requirements:

Heifer will *not* be responsible for any costs incurred in submitting a proposal. All interested Bidders will submit their proposals with the following information. The proposal is not to exceed 5 pages:

General Information

- a. Cover page (*not included in the page limit*): Bidder's bio or organization summary, primary and secondary contact information working on this contract, and reference (at least 3) information must include a brief description of work performed.
- b. Capacity statement (*no more than 1 page*): Including past experiences developing project management manuals, performing gap analyses and developing online courses with international development organizations.

Technical Proposal (*no more than 4 pages*)

- a. Detailed methodology on how the SOW will be implemented, including a clear and comprehensive work plan, outlining the major activities, milestones, roles and responsibilities and time schedule. Table 1 is flexible.

- b. List and briefly describe the team and its proposed personnel, indicating what role each proposed individual will have and the qualifying skill set (*no more than 1 of the 4 pages*).

Financial Proposal (*not included in the page limit*)

- a. The Bidder should provide sufficient detail to allow evaluation of costs proposed.

Interested Bidders are requested to submit a PDF proposal typed in Times New Roman font, size 11, and in English by [October X, 2021; 12 p.m. CST] via email: Procurement <procurement@heifer.org>. Subject line of email must state HPI XXX RFP Submission. All pages must be numbered and include the name of the bidding organization at the bottom of each page.

Late submissions and verification:

Proposals received after the submission deadline will *not* be considered. Bidders are responsible to ensure their proposals are submitted according to the instructions stated herein. Heifer retains the right to terminate this RFP or modify the requirements upon notification to the bidders.

Selection Criteria

Submitted proposals must clearly demonstrate alignment with the SOW outlined above with an appropriate level of detail. The award will be made to a Bidder whose proposal receives a favorable evaluation and recommendation from the selection committee.

Finalist(s) Identification: Heifer may utilize the selection criteria to shortlist bidders, therefore Heifer has the right to have a follow-up discussion with each bidder as deemed necessary. Proposals will be evaluated according to the following criteria:

Criteria	Responsiveness to the RFP - Description	Points
Adherence	- Meeting all scope requirements and services requested in the RFP.	15
Technical	- The bidder's understanding of Heifer's objective, proposed management plan, bidder's qualifications and proposed overall resources. - The alignment of the proposed implementation timeline with Heifer's desired timeline. - The bidder's approach to key implementation tasks including gap analysis, interactive manual development, incorporating feedback and online course development. - The bidder's experience to deliver the Proposed Tasks and Deliverables outlined in Table 1.	40
Bidder Management and Experience	- The bidder's experience delivering the services requested in the RFP. - The bidder's experience with similar implementations for comparable organizations. - The bidder's available facilities and resources for the project and the bidder's plan for management and control of the project.	20

Cost Point Allocation: Heifer will evaluate cost proposals based upon these criteria. Cost points may be refined or replaced in the event of a subsequent Request for Clarification or Request for Best and Final Offer (BAFO). Each Proposal will be eligible to be awarded up to 25 points for cost.

Criteria	Description	Points
----------	-------------	--------

Cost	<p>This criterion considers, as applicable, the costs related to Table 1: Proposed Tasks and Deliverables, taking into consideration that there is flexibility for the listed deliverables in Table 1. It should include the cost services proposed in response to the information solicited by this RFP. Bidders will be evaluated on their pricing as well as on their price in comparison to the other proposers.</p> <p>Heifer reserves the right to add their own estimates of the costs (including any anticipated savings) associated with the required level of internal staffing (business users and IT staff) for implementation and for ongoing support, hardware and overhead costs and savings, and may rely on the bidder’s resource estimates as a basis for their calculations.</p>	25
------	--	----

The selection committee will evaluate the technical proposal based upon the criteria listed above and the financial proposal will be evaluated based on the reasonableness of costs and cost-effectiveness.

Award Process and Contract Mechanism

The proposed contracting mechanism is Milestones/Fixed Price Contract. The following award process is subject to change if Heifer deems necessary.

No.	Activity	Due date
1	Posting of RFP	October 11, 2021
3	Signed and submitted NDA 5:00 pm CST	October 15, 2021
5	Proposal deadline 12:00pm CST	October 27, 2021
6	Selection Committee review	October 28- November 5, 2021
8	Reference checks	October 28- November 5, 2021
9	Notification of award	November 8, 2021
10	Award agreement negotiation	November 8-19, 2021
11	Signing award	November 22, 2021
12	Work begins	November 29, 2021

Heifer will issue a Contract based on submission and Heifer acceptance of deliverables. The contract will include payment schedule with deliverables specified above. The non-disclosure agreement must be signed and submitted prior to the **October 13, 2021**; latest 5 pm CST by email to procurement@heifer.org.

Validity of Proposals

Proposals submitted shall remain open for acceptance for 90 days from the last date specified for receipt of the proposal. This includes but is not limited to pricing, terms and conditions, service levels and all other information. If you or your organization is selected, all information in this document and the negotiation process are contractually binding.

Limitations

This RFP does not represent a commitment to award a contract, to pay any costs incurred in the preparation of a response to this RFP or to procure or to contract for services. Heifer reserves the right to accept or reject in its entirety and absolute discretion any proposal received because of the RFP.

Whistleblower

This policy was created in connection with Sections 806 and 1107 of the Sarbanes-Oxley Act. Heifer implemented this policy to maintain high standards of conduct and ethical behavior. Heifer staff, Board members and Vendors should report suspected waste, abuse, fraudulent or dishonest conduct and/or violations of Heifer’s Policies or applicable law (i.e., act as a Whistleblower). Heifer will

investigate such claims and will protect Whistleblowers who report them from retaliation, in the manner described in this policy.

Other Contract Requirements

Standard Contract: The awarded contractor will be expected to enter a contract that is in compliance with [Heifer's standard contract](#). Proposals should include any desired changes to the standard contract. It should be noted that there are many clauses which Heifer cannot change. Heifer shall perform a background check on the vendor before signing the contract.

Applicable Regulations

Bidders must be legally registered/licensed to operate and provide the required services.

Annex A. Non-Disclosure Agreement

This MUTUAL CONFIDENTIALITY AGREEMENT (“MCA”) is entered into as of _____, 20__ (“Effective Date”), by and between HEIFER PROJECT INTERNATIONAL, an Arkansas nonprofit corporation (“Heifer”), and _____, a(n) _____ (“Company”). For good and valuable consideration, the receipt and sufficiency of which are hereby acknowledged, the parties hereto (singularly a “Party” and collectively the “Parties”) agree as follows:

Section 1. Relationship/Warranties. Parties contemplate a relationship whereby Company may complete certain work and/or projects for Heifer (“Project”). In order for Company to complete the Project each Party (the disclosing Party is known hereinafter as the “Discloser”) must provide to the other Party (the receiving Party is known hereinafter as the “Recipient”) certain proprietary, secret, confidential and/or other information not generally available to the public, which may include but not be limited to trade secrets, project participant information, donor information, fundraising and business strategies, materials, processes, procedures, systems, computer programs, devices, operations, personnel records, and financial information (the “CI”). THE CI IS PROVIDED “AS IS”, AND DISCLOSER MAKES NO WARRANTIES, EXPRESS, IMPLIED OR OTHERWISE, REGARDING THE ACCURACY, COMPLETENESS, OR PERFORMANCE OF THE CI.

Section 2. Confidentiality/Damages. No license is granted hereby, and the CI shall remain Discloser’s property. The CI is being disclosed to Recipient solely for the express purpose of allowing Recipient to complete the Project, and Recipient shall not use the CI for any other purpose. Recipient agrees it will hold the CI in strict confidence and (a) shall not misappropriate or mishandle the CI, or otherwise disseminate, divulge, or disclose, or cause, assist, or allow any other party to disseminate, divulge, or disclose, all or part of the CI to any third party, other than Recipient’s third party professionals also bound by a duty of confidentiality at least as comprehensive as that contained in this MCA (“Authorized Individuals”), and (b) shall not take any other steps to prevent or circumvent the broad goals and intentions of this MCA. If Recipient finds it necessary to disseminate the CI to Authorized Individuals, it shall inform them of the confidential nature of the CI, and Recipient shall be responsible for any and all damages caused to Discloser if said Authorized Individuals do not abide by this MCA. Recipient agrees irreparable damage may result from a breach of this MCA, and that a breach may be remedied by specific performance, immediate injunction, and any other remedies allowed by law. Within ten (10) days of Discloser’s request, Recipient shall return all CI to Discloser, and will not retain any copies thereof. CI shall not include any information which Recipient can establish (a) was publicly known and made generally available in the public domain prior to the time of disclosure to Recipient, (b) becomes publicly known and made generally available after disclosure to Recipient by Discloser through no action or inaction of Recipient, or (c) is in the possession of Recipient, without confidentiality restrictions, at the time of disclosure by Discloser as shown by Recipient’s files and records prior to disclosure. Notwithstanding anything herein to the contrary, Recipient may disclose CI to the extent necessary to comply with any law, regulation, or court order; provided Recipient must promptly notify Discloser of such proposed disclosure or delivery prior thereto. In addition, Recipient shall, if requested by Discloser, use its best efforts to lawfully cooperate with Discloser to seek a protective order or other appropriate remedy to prevent the disclosure of CI. This **Section 2** shall survive the termination or expiration of this MCA.

Section 3. Miscellaneous. This MCA may be executed in multiple counterparts which, when read together, shall constitute and comprise a single document. Facsimile signatures hereto shall be as enforceable and binding as manual signatures hereto. This MCA shall be governed by the laws of the State of Arkansas, and all disputes that might arise hereunder shall be adjudicated exclusively in Pulaski County, Arkansas. This MCA may only be modified or amended by a written document executed by and between the Parties. This MCA constitutes the entire agreement and understanding between the Parties relating to the subject matter contained herein, and supersedes any prior or contemporaneous terms, representations, statements, or agreements, whether made orally or in writing, with respect to the subject matter contained herein. Each party executing this MCA covenants that he/she has the power to enter into this MCA and bind his/her principal, if any, thereto. Each provision of this MCA is severable and to the extent any provision is deemed invalid or unenforceable, such invalidity or unenforceability shall not affect the validity or enforceability of the remaining provisions of the MCA. Parties are independent contractors, and this MCA is neither intended to, nor shall it be construed as, creating a joint venture, partnership, agency, employment relationship, or any other relationship that may result in vicarious

liability. Nothing in this MCA shall obligate the Parties to enter into any further agreements with one another. A Party may not assign this MCA in whole or in part without the prior written consent of the other Party. Either Party may terminate this MCA upon ten (10) days' prior written notice sent to the other Party.

IN WITNESS WHEREOF, the Parties execute this MCA as of the Effective Date.

HEIFER PROJECT INTERNATIONAL
(COMPANY)

Signature: _____

Signature: _____

Name: _____

Name: _____

Title: _____

Title: _____

Date: _____

Date: _____

Annex B. The minimum standards for project lifecycle and key actions.

Shared after the NDA is received from the bidder.