

Request for Proposal
RFP No. 66/SHOPS PLUS/2020

IN-CLINIC PROMOTION OF HELPLINE (PILOT PHASE)
FOR SHOPS PLUS INDIA PROJECT

Issue Date	17th July 2020
Reference	RFP No. 66/SHOPS PLUS/2020
Due Date for receiving questions/clarifications on the RFP	21st July 2020 (by 11:59pm IST)
Due Date for Response to questions	23rd July 2020
Proposal Due Date	31st July 2020 (by 11:59pm IST)
RFP Title	In-clinic Promotion of Helpline (Pilot Phase) for SHOPS Plus India Project
Issued By:	Abt Associates India Pvt. Ltd.
This request for Proposal contains the following sections:	
Introduction	
Part 1	Instructions to Offerors
Part 2	Evaluation Factors for Award
Part 3	Statement of Work
Part 4	Annexures Annex 1: Cost Proposal Template (attached excel file) Annex 2: International Representation and Certification Form Annex 3: Bio data sheet template to be submitted by final offeror duly signed by key employee and counter signed by authorized signatory of offeror

Introduction:

Abt Associates Inc. (Abt) invites qualified organizations to submit a technical and cost proposal for **In-clinic Promotion of Helpline (Pilot Phase)**. The objective of this activity is to promote the FP Helpline services to the service providers who are members of the professional organization (provider marketing) as well as to the consumers/ patients of the of service providers (in-clinic marketing).

This RFP is issued under Cooperative Agreement No AID-OAAA-15-00067 entitled Sustaining Health Outcomes through the Private Sector (SHOPS) Plus. Abt anticipates awarding a firm fixed price contract resulting from this RFP.

PART 1: INSTRUCTIONS AND PROCEDURES

I. General Instructions to Offerors

- A. The offeror is requested to submit a proposal directly responsive to the terms, conditions, and clauses of this RFP. Proposals not conforming to this solicitation may be categorized as unacceptable, thereby eliminating them from further consideration.
- B. Proposals must be received no later than the proposal due date listed on Page 1 of this RFP. Proposals must be signed and remain valid for a minimum of ninety (90) days. The Offeror may submit its proposal accordingly:
 1. Electronically - email documents in pdf, unless specifically requested, to rfpresponse@abtindia.net . The Subject line to state **“In-clinic Promotion of Helpline Promotion (Pilot Phase) for SHOPS Plus India Project” RFP no. 66/SHOPS PLUS/2020.**
 2. The Technical Proposal and Cost Proposal must be kept as separate parts of the total proposal package. Accordingly, the overall proposal shall consist of two (2) physically separated parts, as follows: Volume I – Technical Proposal; and Volume II – Cost Proposal. Technical Proposals must not make reference to pricing.
- C. Any proposal received in response to this solicitation will be reviewed as submitted and in accordance with the evaluation criteria specified in Part 2 – Evaluation Factors for Award.
- D. The person signing the offeror’s proposal must have the authority to commit the offeror to all the provisions of the offeror’s proposal.
- E. Abt Associates Inc. is not obligated to make an award or to pay for any costs incurred by the offeror in preparation of a proposal in response hereto.
- F. The Offeror should submit its best proposal initially as Abt intends to evaluate proposals and may make an award without discussions.
- G. Proposals must be clearly and concisely written and must describe and define the offeror’s understanding and compliance with the requirements contained in Scope of Work, which can be found in Part 3. The proposal should clearly address each of the evaluation factors set forth in Part 2 and respond to Part 3. All pages of each volume (cost and technical) must be sequentially numbered and identified with the name of the offeror and the RFP number.
- H. Except as otherwise specifically provided herein, all time periods specified shall be consecutive calendar days.
- I. All documents submitted in response to this RFP, as well as all correspondence in connection with the RFP, shall be in the English language.
- J. Inquiries concerning this RFP must be submitted in via email and sufficiently in advance of the Last Date for Receipt of Further Information by 21st July 2020 by 11:59pm IST to permit a thorough and accurate response by Abt Associates. Inquiry emails should be directed to Attention: Request for Further Information, **“In-clinic Promotion of Helpline (Pilot Phase) for SHOPS Plus India Project” RFP no. 66/SHOPS PLUS/2020** email: rfpresponse@abtindia.net, Abt Associates is under no obligation to consider or respond to questions that are not received in a timely manner. All responses to questions will be issued to Offerors as an amendment to this 23rd July 2020 .

II. Special RFP Considerations

- A. Offerors are informed that by submitting a response to this Request for Proposal, they agree to abide by the Terms and Conditions of this solicitation.
- B. Offerors are informed that Abt Associates Inc. complies with U.S. Executive Order #13224 on Terrorist Financing, which effectively prohibits transactions with persons who commit, threaten to commit or support terrorism. Any person or entity that participates in this procurement process, either as a prime or sub to the prime, must certify as part of the proposal that it is not on the U.S. Department of Treasury Office of Foreign Assets Control (OFAC) Specially Designated Nationals (SDN) List and is eligible to participate. Any proposal received by a person or entity that is found to be on the List or otherwise ineligible will be disqualified.
- C. Requirement for Data Universal Numbering System (DUNS) number: The Offeror selected for the contract must be registered with DUNS and must provide the DUNS number to Abt Associates before the contract can be issued.

If the organization doesn't have a DUNS number at the time of submission of the proposal, indicate on the cover page that you will apply for it.

- D. Abt Associates will issue one contract resulting from this solicitation to the responsible Offeror whose offer conforms to the solicitation and provides the best value to Abt Associates. USAID Standard Provisions will be flowed down the resulting contract. For details visit: <https://www.usaid.gov/ads/policy/300/303mab>

- E. Abt Associates can make available the contents of the contract on request of the offeror.

III. INSTRUCTIONS FOR THE PREPARATION OF THE TECHNICAL PROPOSAL

- A. The Technical Proposal should provide a straightforward, concise delineation of how the offeror intends to carry out and satisfy the requirements of the Statement of Work described in Part 3. No price information is to be included in the offeror's Technical Proposal in order that it may be evaluated only on its technical merit.
- B. Drawing from relevant experience, the offeror shall demonstrate its understanding, ability and overall approach to performing the requirements described in the Statement of Work. Anticipated challenges and potential opportunities to enrich the program should be addressed throughout the response. The Technical Proposal should be a Microsoft Word document. It should be typed, single-spaced, on white paper, and pages must be numbered consecutively. The maximum number of pages or slides for each component of the technical proposal is shown below. The Technical Proposal shall include:
1. Cover Page (Not exceeding 1 page or 1-2 slides)
 - a. State that the proposal is made to Abt Associates Inc.
 - b. Full legal name, address, telephone number, fax number, website and email of contact person of the organization submitting the proposal
 - c. Date of submission
 - d. RFP Reference
 - e. Signed and dated by authorized offeror's employee
 - f. Bid validity period of at least 90 days
 - g. DUNS Number Status: State number or indicate organization will apply

2. Firm Experience and Past Performance (not to exceed 3 Pages)

The Offeror should provide corporate capabilities and past performance experience describing how your firm's past experience makes you uniquely qualified to execute the work outlined in the Statement of Work (Part 3). The offeror must include:

- A summary presentation of the organization, stating its areas of expertise;
- An up-to-date list (of the last 5 years) of clients with reference contacts (please provide the names and phone numbers or current email addresses); and
- Specific experience on the issues included in the Scope of Work and/or in other areas of the study.

The Offeror shall submit two references about completed projects to demonstrate the applicant's ability to conduct similar research studies, preferably using a mystery client methodology. Referral letters from clients who already used the Offeror's services in the past will also be taken into account with particular interest.

3. Technical Approach (Maximum: 22 Pages or 36 slides)

- a. A narrative must be included in the technical approach, describing how the Statement of Work (Part 3) will be implemented and desired outcomes accomplished. The contents of the technical approach should adhere to all instruction and address the requirements and assumptions provided in Part 3. The technical approach should also include a timeline showing the approximate dates when activity milestones will be met and deliverables will be submitted for approval.

4. Communications and Staffing Plan (not to exceed 3 pages, excluding resumes, commitment letters and personnel data)

The Offeror shall propose staff members in key positions who will be responsible for implementing the work outlined in the Statement of Work (Part 3). A team leader shall oversee the technical aspects of the study, supervise all staff members, directly participate in the supervision of field work, monitor work progress, manage budgets and expenses, prepare and submit reports within the agreed timeframe, and be the primary contact for the SHOPS Plus team. The team leader must have enough time to regularly communicate with the SHOPS Plus team throughout the duration of the activities. The Offeror should also designate other key personnel deemed critical to the successful implementation of this scope of work. All staff members in key positions must be fluent in English. Key personnel shall not be substituted without formal approval from Abt Associates.

The proposed staffing plan should include:

- A description of roles and responsibilities for all proposed staff in key positions.
- A brief description of the qualifications and experience of each staff member in key positions.
- A percentage of time spent on this work for each key staff member identified.
- A brief description of roles and responsibilities for all additional personnel.
- An updated CV for each key personnel identified shall be included as an Annex in the Technical Volume. Key Personnel CVs will not count against the page limitation. Please only submit CVs (three page maximum) for Key Personnel. CVs should include 3 references with contact information.

IV. INSTRUCTIONS FOR THE PREPARATION OF THE COST PROPOSAL

- A. The Offeror must propose costs that it believes are realistic and reasonable for the work in accordance with the Offeror's technical approach.

- B. The Offeror shall provide a complete budget by the cost elements described below using the budget proposal template provided in Annex 1. The Excel template must be unlocked, with no hidden cells. Formulae should be used for calculating costs rather than calculating costs elsewhere and typing values into cells. The Offeror shall also provide a Budget Narrative (indicated in the budget proposal template) further explaining the method of calculating costs listed in the budget. The Budget Narrative should include any methodology used for calculating a proposed cost.
- C. Costs shall be presented in INR currency.

Part 2: Evaluation Factors for Award

I.GENERAL – PROPOSAL EVALUATION

- A. Proposals received in response to this RFP will be evaluated using the evaluation factors set forth in this part, Part 2, of this RFP and their responsiveness to Part 3 of this RFP.
- B. Part 1 provides guidance to offerors concerning the documentation necessary to conduct an informed evaluation of each proposal. The Offeror must furnish adequate and specific information in its proposal. A proposal may be eliminated from further consideration before a detailed evaluation is performed if the proposal is considered deficient, unacceptable, incomplete or unreasonable in which prices are inordinately high or unrealistically low.
- C. In conducting its evaluation of proposals, Abt may seek information from any source it deems appropriate to obtain or validate information regarding an Offeror’s past performance.
- D. Abt reserves the right to award one or more contracts under this RFP based on initial offers without discussions or without establishing a competitive range.

II.BASIS FOR CONTRACT AWARD

- A. The criteria/factors presented in III below will serve as the basis upon which proposals will be evaluated. The cost proposal will be evaluated separately with all factors other than cost or price, when taken together, are of more importance than cost or price.
- B. Offerors are reminded that Abt is not obliged to award a contract on the basis of lowest proposed cost or highest technical evaluation score. Abt will make the award to the Offeror whose proposal offers the best value, considering both technical and cost factors. For this procurement technical proposal criteria are considered more important than cost.

III. EVALUATION FACTORS

A. Evaluation Procedures.

Each proposal will be evaluated against a pre-defined set of criteria as follows:

Total out of 100:

- a) Technical: 70
- b) Cost: 30

1. Stage One “Technical Proposal:” Each technical proposal shall be evaluated on its technical rigor, and level of detail provided, and on the basis of its responsiveness to the Statement of

Work. Technical proposal scoring criteria are listed below in Part B. Scoring for technical proposals is out of 70 points.

- a. Offerors must obtain a minimum technical score of 50 points out of 70 to continue to the second stage. Cost Proposals from Offerors that do not successfully pass the first stage will remain unopened.
 - b. The technical proposal is evaluated on the basis of its responsiveness to the Statement of Work (SOW).
2. Stage Two “Cost Proposal” will evaluate price of up to five proposals that have successfully passed the first stage requirements. The cost proposals will be evaluated separately from the technical proposals.
 3. Stage Three: Abt may at its discretion invite shortlisted agencies to make a presentation on their technical and cost proposal. Where the offeror is required to modify the proposal in light of the clarifications on the SOW or to align with comments from the Abt technical team, the offeror may be required to submit a revised technical and cost proposal.
 4. Stage Four “Establishment of Competitive Range and request for Best and Final Offeror (BAFO) proposal”: The most highly rated proposals from Stages One and Two will be considered to have made the competitive range. Abt may enter into discussions or negotiations with one or more offerors and request a BAFO from each Offeror in the competitive range.
 5. Stage Five: Abt Associates will evaluate BAFO technical and cost proposals. Abt will consider technical and price/cost factors together. It will award to the Offeror whose proposal offers the best value, considering trade-offs between price/cost and technical factors.
 6. **Amendments.** If at any time prior to award Abt Associates deems there to be a need for a significant modification to the terms and conditions of this RFP, Abt Associates will issue such a modification as a written RFP amendment to all competing offerors. No oral statement of any person shall in any manner be deemed to modify or otherwise affect any RFP term or condition, and no offeror shall rely on any such statement.
 7. **Extension of Bid Validity Dates.** When necessary and appropriate under the circumstances, Abt Associates may request offerors, in writing, to extend the validity period of their bids. An offeror may refuse to extend; however, its bid will be disqualified. Subject to Section 2.9, an offeror agreeing to extend will not generally be permitted or required to modify its bid in any manner other than to extend it.
 8. **Responsibility.** A successful offeror may be required, in order to be awarded a Contract pursuant to this RFP, to demonstrate to the satisfaction of Abt Associates that it is a responsible firm with regard to the specific transaction described in this RFP. In order to be determined responsible, a offeror must (1) have adequate personnel, financial resources, equipment, and material to perform the Sub-Agreement, or the ability to obtain them; (2) be able to comply with the required or proposed delivery schedule and, (3) have a satisfactory record of performance, business ethics and integrity. Abt Associates reserves the right to request additional information relevant to responsibility at any time prior to award.
 9. **Rejection or Award.** Abt Associates is not bound to accept the lowest priced or any proposal and reserves the right to accept any proposal in whole or in part and to reject any or all proposals. Circumstances in which rejection of all proposals may occur include, without limitation, the following: (1) Offeror is ineligible to tender under this RFP on any grounds laid down by our donors’ procurement laws, regulations and policies, (2) the bid is not accompanied with the required supporting documents, (3) the bid is not substantially responsive to the terms, conditions and specifications in the RFP, and (4) the bid is not otherwise generally in order. A decision by Abt Associates regarding whether or not to reject any bid that is or may be

inadmissible shall not be subject to question by any Offeror whose bid is not itself fully responsive and admissible.

B. Technical Proposal Evaluation Criteria.

The technical proposal is evaluated on the basis of its responsiveness to the Scope of Work (SOW) as follows:

	Criteria	Score
a.	Relevant work over the past 3 years involving health care providers	10
b.	Overall team composition to handle the requirements as stated in the RFP	10
c.	Overall strategy, concept and ideas for promoting the Helpline a) Among Providers b) Among consumers in waiting areas	30
d.	Potential of the proposed concepts to enroll providers and increase calls to the helpline	20

C. Cost Proposal.

- a) All cost and financial data should be supported and organized in a manner that facilitates review and permits cost analysis, if necessary. Please note that the Offeror may be asked to verify/substantiate the proposed costs.
- b) The Cost Proposal shall be typed with each page numbered consecutively. The Cost Proposal shall include:
 - 1. Transmittal Letter
 - i. Transmittal Letter - A statement indicating that the proposal remains available for acceptance by Abt Associates for a minimum of ninety (90) calendar days after the closing date of this RFP. The transmittal letter must include a summary of the offer and its price and be signed by an individual authorized to commit the Offeror.
 - 2. Detailed Budget Breakdown
 - i. The Offeror shall, as part of the Proposal, provide budget breakdown denominated in INR in the format shown in Annex 1, Proposal Budget Template.
 - ii. The Offeror shall provide a complete budget, in Indian Rupees, by the cost elements described in the budget Application template provided in attached excel sheet. **The Excel template must be unlocked, with no hidden cells.** Formulae should be used for calculating costs rather than calculating costs elsewhere and typing values into cells.
 - 3. Budget Narrative

The Offeror shall also provide a Budget Narrative (indicated in the budget proposal template) further include any methodology used for calculating a proposed cost. Include a description on which resources the firm already possesses.
- (ii) The Cost proposal (pdf file duly signed by offeror’s authorized employee) must be realistic for the work to be performed, reflect a clear understanding of the technical requirements, and must be consistent with the methods of performance and materials described in the technical proposal. Please note that the Offeror may be asked to verify/substantiate the proposed costs.

Part 3: STATEMENT OF WORK

In-clinic promotion of the Helpline (Pilot Phase)

About the SHOPS Plus, India project:

The Sustaining Health Outcomes through the Private Sector (SHOPS) Plus project in India is an initiative to increase the use of family planning (FP), maternal, neonatal and child health (MNCH) and tuberculosis (TB) treatment products and services among the urban poor by harnessing the potential of the private sector and catalyzing public-private engagement. The SHOPS Plus India project builds on past successes and lessons learned from the United States Agency of International Development's (USAID) investments in private sector solutions implemented by Abt Associates in India.

These projects have demonstrated the effectiveness of social and behavior change communications (SBCC) in increasing uptake of health products and services, harnessing the innovations and resources of the private sector for improving health outcomes, demonstrating effective public-private engagement approaches, and implementing market-based approaches to reach underserved populations with health products and information sustainably.

The project's strategic objective is to increase use of priority (family planning, maternal, newborn and child health and tuberculosis) health products and services among the urban poor through private sector approaches and partnerships.

- The components of SHOPS Plus India that pertain to this RFP are:

Component 1 – Family Planning

Revitalizing the market for short-acting contraceptive methods to address unmet need of young married couples

Background on Helpline:

Increasing access to family planning and reproductive health counseling

Due to the limited access to quality family planning and reproductive health information, SHOPS Plus has implemented campaigns to promote the adoption of short-acting methods among young, married couples (ages 18-29) in urban areas of Assam, Delhi, Chhattisgarh, Jharkhand, Odisha and Uttarakhand.. While the campaign will have wide reach, it cannot fully address a couples' questions and concerns regarding product use and side effects.

Keeping above context in considerations, the SHOPS Plus program of Abt India currently runs a Family Planning (FP) Helpline which can be accessed by dialing 1800 258 0001. The helpline is available to callers from 9 AM to 9 PM (12 hours) from Monday to Saturday (6 days) in English and Hindi languages. Counselling services are offered by both male as well as female counselors. The helpline is managed for Abt India by a leading information & communication technology group providing BPO and managed services in India and abroad.

The helpline promotes method choice to the callers and provides comprehensive unbiased information on each method that helps the caller make an informed choice that is best suited for his / her needs. All this happens while fostering confidentiality and trust for the caller.

Partnership

SHOPS Plus India has a partnership with a leading professional organization representing health care practitioners in India. It is probably one of the largest membership based organizations of specialized professionals.

The professional organization will endorse and adopt the FP Helpline which is recognized as a support to their member doctors in providing family planning counseling services to patients.

Objective

The objective of this activity is to promote the FP Helpline services to the service providers who are members of the professional organization (provider marketing) as well as to the consumers/ patients of the service providers (in-clinic marketing).

Scale

The pilot for the helpline is proposed for Delhi NCR (Delhi, Noida and Gurugram) and Raipur with 500 service providers who agree to associate with the activity. Details of a larger cohort of providers in these cities who will be approached for participation in the pilot, will be shared by SHOPS Plus project to the agency awarded this assignments. Based on the success of the pilot, the professional organization intends to scale up the helpline promotion amongst its large membership base across India in early 2021.

Scope

The winning offeror will carry out the end to end promotion activities including (but not limited to) the following:

1. **Creative development: Within 14 days of contracting¹**

- Design and roll out (deployment) of an engagement program with providers and patients including concept introduction, onboarding and sustenance (to ensure that the interest does not wean off).
- Designing all provider and consumer directed communication and in clinic promotion materials leading to increase in numbers of calls over helpline
- Adapt appropriate tools, materials used by SHOPS plus in the past for in-clinic promotion².
- Propose ideas for recognizing doctors, who agree to promote the helpline.

2. **Enrollment and distribution of collaterals: Over a 21 day period**

- Enrollment of 500 providers for the program through a web or digital based approach.
- Develop call flow to equip helpline counselor to clarify provider queries on the helpline and this specific initiative.
- Produce collaterals and give away's / merchandise for providers and / or patients.

3. **Continued engagement with the provider and clinic** to increase referrals/ calls to helpline: This will be executed over the life of the project, once the above two activities are completed.

- Advise on frequency and medium of communication for providers and consumers who visit the clinics of the providers, including digital approaches. In discussion with SHOPS Plus, facilitate

¹ Timelines will be fixed upon award based on strategy

² Refer to the following SHOPS Plus documents. Note tools and materials from On Ground Activation ideas that could be used in the clinic. Adapt/ adopt existing promotion materials which could include but not limited to posters, radio spots, QR codes displays leading to digital content on the net, virtual reality games to engage the captive audience in the waiting areas etc

a) Three lessons on sparking behavior change through interpersonal communication

<https://shopsplusproject.org/article/three-lessons-sparking-behavior-change-through-interpersonal-communication>

b) Making behavior change fun

<https://www.shopsplusproject.org/article/making-behavior-change-fun>

c) Entertainment, education, engagement for health

<https://shopsplusproject.org/resource-center/entertainment-education-engagement-health>

continued engagement with providers using digital mediums like WhatsApp, email, out dialers, SMS.

- Advise on activities that could be executed at the clinic without any additional outside support eg Virtual Reality bases games or QR coded posters that lead to helpline micro-site on website of professional association that will be developed by the agency, if deemed necessary.
- Design fortnightly communication for sharing details of calls from patients referred by providers, as reported to helpline counselors. Track referral numbers as self-reported by providers and compare with actual number of callers.
- Use geo tagged advertising with patient’s visiting the clinic to promote helpline and prompt conversation with doctor on helpline.
- Live doctors sessions on SHOPS Plus digital platforms, involving key office bearers of the professional association¹

Considerations for enrolment and distribution

Enroll providers through microsite on website of professional association, whatsapp, webinars or other digital means, obviating the need for physical or human interface, within a two week period². Ascertain suitable time for delivery of collaterals for doctors and in-clinic promotion materials. Restrict physical interface to 1-2 meetings to share provider onboarding kit, in clinic branding etc. Complete delivery and installation of collaterals within a period of 2 weeks among 500 enrolled providers, starting within a week of provider enrollment.

Period of performance

17th August – 23rd December, 2020

Additional Information

Offerors are encouraged to call the helpline number and get the firsthand experience of the same. Dial 1800 258 0001

Deliverables

Anticipated Deliverables	Anticipated Timeline in Days
1. Marketing cum Communication Strategy	14 days
2. Communication Products -Including promotional material such as: Posters, table top materials, prescription pad, batches, referral slips etc - Leaflets, Zig saw puzzles, virtual games, give aways from doctor etc	
3.Enrollement confirmation of upto 500 providers through online or mobile platforms	21 days
4.Delivery of appropriate products to enrolled providers	
5.Execution of communication activities to sustain interest among providers	During the remaining Life of the Project till 15 th Dec, 2020

¹ <https://www.facebook.com/khushiyonkishuruaat/>

²² The agency will be provided API to initially access the database of the professional organization, rather than mobile numbers. The selected agency will need to propose a technology solution which can be executed by the professional organization wherever SMS or WhatsApp messages are involved.

6.Summary report of communication activities to sustain provider interest with recommendation for future scale up	23 rd Dec, 2020
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Deliverables (detailed)

- Communication strategy for a) enrolling providers to promote the helpline b) promote helpline to patients visiting the clinics to enroll promote the helpline and c) sustaining provider interest to increase the number of patients referred by the provider to the helpline month-on-month
- Development of on-boarding kit and collaterals: Indicate list of creative that can be looked for development in your proposal. Illustrative options are listed below:-

a) For Providers: Posters, table top materials, prescription pad, batches, referral slips etc.

b) For Consumers: Leaflets, Zig saw puzzles, virtual games, give aways from doctor etc

The offeror must propose what they think is a cost effective set of materials that can achieve the objective of this scope. Abt reserves the right to choose the combination of minimum materials that it deems is sufficient to meet the objective.

- Enrollment/ sign up of 500 providers with potentially 450 from NCR and 50 from Raipur(Exact enrollment methodology will be proposed by agency. Supporting document to confirm enrollment will be online or mobile based)
- Ensure delivery of all collateral's and activations (based on the materials proposed) to all the enrolled providers.
- Execution of communication activities to sustain interest among providers, geared towards increasing referrals to helpline (*post initial enrollment and distribution of communication materials*)
- [Summary report of communication activities to sustain provider interest with recommendation for future scale up](#)

Timeline

Agency will submit detailed timeline chart of how the scope of work and deliverables will be implemented, assuming a start date of 17th August

Agency will also submit the details of the Work-in-Progress reports that that they are going to submit at specified regular intervals as discussed and agreed with SHOPS Plus team.

Requirements from the agency at the proposal stage for the technical proposal

(Maximum: 22 Pages or 36 slides)

1. Agency Profile

- *Relevant clients, products and work/campaigns over the past three years involving health care providers*
- *Annualized billings over the last 3 financial years*

- *Samples of prior work must be mentioned/provided (online as links)*
 - *Any other relevant information*
2. Personnel on the account:
 - *Overall team composition to handle all the components as stated in the RFP and meet the necessary requirements*
 - *Details of full time or part time, consultants*
 - *Any other relevant information*
 3. Partners
 - *If any portion of the work will be outsourced, give details of the agency you intend to engage. If you are yet to firm up the partnership at the time of the bidding, indicate the agencies that you are considering. Final award of the contract may be contingent on confirmation of the partnership*
 4. Overall marketing cum communications strategy, approach and timeline for executing the SOW
 5. Creative concepts and ideas for providers and patient directed communication
 6. Overall 'look' of the helpline promotion campaign (including key visuals, name, color template, fonts, etc.)
 7. Projections on number of calls that will be generated per month during the period of performance¹

¹ The agency is not accountable for the eventual number of calls but will be a valued partner to increase the call volumes

PART-V ANNEXURES

Annex 1. Cost Proposal

The complete Cost Proposal has to be submitted at the proposal stage (refer attached excel sheet for submission of cost proposal).

1. Summary:

S.NO.	Budget Line Item	Amount (INR)
1	Marketing cum Communication Strategy	0
2	Communication Products -Including promotional material such as: Posters, table top materials, prescription pad, batches, referral slips etc - Leaflets, Zig saw puzzles, virtual games, give aways from doctor etc	0
3	Enrollment confirmation of upto 500 providers through online or mobile platforms	0
4	Delivery of appropriate products to enrolled providers	0
5	Execution of communication activities to sustain interest among providers	0
6	Summary report of communication activities to sustain provider interest with recommendation for future scale up	0
	Grand Total (inclusive of applicable taxes)	0

2. Detailed break up: For each of the category mentioned in the summary sheet, please provide detailed breakup of the mentioned cost such as Human resource time, no of collaterals along with development cost, communication costs and others.

Note:

- All payment will be against the submission of invoices (along with actual proof of spend where applicable).
- Agency should provide detailed costs so that reviewer has full information of how the budget was prepared.

Detailed Budget

The Offeror shall break down proposed costs in sufficient detail in the attached budget template attachment to permit cost analysis. Budget shall be denominated in Indian Rupees.

The Budget must be submitted in Excel format using the budget template **and** in pdf. The excel file must be unprotected and there should be no hidden columns/rows/cells.

The Offeror is required to use the budget template attached to submit their budget breakdown of this activity. The Offeror may amend the budget template, but must provide explanations for the amendments.

Any budget submitted in a different template will not be accepted and the application will not be considered.

Budget Narrative

As part of the Cost Proposal, the Offerors shall include a budget narrative justifying the detailed budget which will be entered in a column specified for it within a detailed budget sheet. Include a description on which resources the firm already possesses and which are the one it will acquire for this bid.

(i) Personnel

The Offeror shall provide the key staff individual's name, position title, the unit (days), the number of units (i.e. the level of effort) and daily rate. Daily rate shall not include overhead costs and profit.

The Offeror on final shortlisting shall submit completed Employee Biographical Data Sheets for each key staff person. The individual and the Offeror in the appropriate spaces must sign the form, with all blocks completed. The proposed position titles must be consistent with the Technical Proposal.

(ii) Consultant fees

The Offeror shall provide the consultant position title, units (i.e. number of day), the number of units (i.e. the level of effort), and daily rate. Daily rate shall not include overhead costs and profit.

(iii) Travel and Transportation

Travel and Transportation includes per diem and shall be broken down by traveller, transportation vehicle, number of trips and the corresponding number of days of per diem. Include a basis of estimate for each trip.

(iv) Other Direct Costs (ODC)

The Offeror shall submit details of all other direct costs (ODCs). ODCs include costs such as communication, training meetings, expendable supplies and materials, report preparation/reproduction and publications. Include a basis of estimate for each item.

ANEXX. 2

ABT ASSOCIATES INC. INTERNATIONAL REPRESENTATIONS AND CERTIFICATIONS

This document is to be used if Bidder's performance is outside the United States, all deliverables are to be received outside the United States, and Bidder is not recruiting employees in the United States to work on this Project.

The Bidder represents and certifies as part of its offer that: *(Check or complete all applicable boxes or blocks.)*

1. **TYPE OF ORGANIZATION.** It operates as an individual, a partnership, a nonprofit organization, a Corporation, other business entity with home offices in the country of _____.

2. **ANTI-KICKBACK.** By submission of this offer, the Bidder certifies that it has not provided, attempted to provide, offered to provide, solicited, accepted, or attempted to accept any kickback; and has not included, directly or indirectly, the amount of any kickback in the offer. "Kickback" means any money, fee, commission, credit, gift, gratuity, thing of value, or compensation of any kind that is provided, directly or indirectly, to any Government prime contractor (e.g., the Company), prime contractor employee, subcontractor at any tier, or employee of a subcontractor at any tier, for the purpose of improperly obtaining or rewarding favorable treatment in connection with a Government prime contractor in connection with a subcontract at any tier relating to a Government prime contract.

3. **CERTIFICATION REGARDING DEBARMENT, SUSPENSION, PROPOSED DEBARMENT, AND OTHER RESPONSIBILITY MATTERS.**

(a) (1) The Bidder certifies, to the best of its knowledge and belief, that:

(i) The Bidder and/or any of its Principals:

(A) Are are not at present debarred, suspended, proposed for debarment, or declared ineligible for the award of contracts by any Federal agency; (B) Have have not , within a three-year period preceding this offer, been convicted of or had a civil judgment rendered against them for: commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a public (Federal, state, or local) contract or subcontract; violation of Federal or state antitrust statutes relating to the submission of offers; or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, or receiving stolen property; and (C) Are are not presently indicted for, otherwise criminally or civilly charged by a governmental entity with, commission of any of the offenses enumerated in subdivision (a)(1)(i)(B) of this provision.

(ii) The Bidder has has not , within a three-year period preceding this offer, had one or more contracts terminated for default by any Federal agency.

(2) "Principals," for the purposes of this certification, means officers; directors; owners; partners; and persons having primary management or supervisory responsibilities within a business entity (e.g., general manager; plant manager; head of a subsidiary, division, or business segment, and similar positions). THIS CERTIFICATION CONCERNS A MATTER WITHIN THE JURISDICTION OF AN AGENCY OF THE UNITED STATES AND THE MAKING OF A FALSE, FICTITIOUS, OR FRAUDULENT CERTIFICATION MAY RENDER THE MAKER SUBJECT TO PROSECUTION UNDER SECTION 1001, TITLE 18, UNITED STATES CODE.

(b) The Bidder shall provide immediate written notice to the Company if, at any time prior to subcontract award, the Bidder learns that its certification was erroneous when submitted or has become erroneous by reason of changed circumstances.

4. PAYMENTS TO INFLUENCE CERTAIN FEDERAL TRANSACTIONS. *(Applicable if offer exceeds \$100,000.)*(a) The definitions and prohibitions contained in the Limitation on Payments to Influence Certain Federal Transactions clause, included in this solicitation, are hereby incorporated by reference in paragraph (b) of this certification. (b) The Bidder, by signing its offer, hereby certifies to the best of his or her knowledge and belief as of as of July 4, 2018, that (1) no Federal appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress on his or her behalf in connection with the awarding of any Federal contract, the making of any Federal grant, the making of any Federal loan, the entering into of any cooperative agreement, and the extension, continuation, renewal, amendment or modification of any Federal contract, grant, loan, or cooperative agreement; (2) if any funds other than Federal appropriated funds (including profit or fee received under a covered Federal transaction) have been paid, or will be paid, to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress on his or her behalf in connection with this solicitation, the Bidder shall complete and submit, with its offer, OMB standard form LLL, Disclosure of Lobbying Activities, to the Company; and (3) he or she will include the language of this certification in all subcontract awards at any tier and require that all recipients of subcontract awards in excess of \$100,000 shall certify and disclose accordingly. (c) Submission of this certification and disclosure is a prerequisite for making or entering into this subcontract imposed by Section 1352, Title 31, United States Code. Any person who makes an expenditure prohibited under this provision or who fails to file or amend the disclosure form to be filed or amended by this provision, shall be subject to a civil penalty of not less than \$10,000, and not more than \$100,000, for each such failure.

5. TRAFFICKING IN PERSONS

The U.S. Government and Abt Associates have a zero tolerance policy regarding trafficking in persons. To that end, USAID ADS303 mab clause M.15, Trafficking in Persons (July 2015) is incorporated herein as a mandatory reference. By signature on this form, Bidder acknowledges that they are responsible for reading, understanding and complying with this Clause.

SIGNED:

ORGANIZATION NAME: _____

SIGNATURE: _____

PRINTED NAME: _____

TITLE: _____

DATE: _____

ANNEX. 3

Contractor Employee Biographical Data Sheet

(to be submitted in stipulated format prior to the award of the contract. Not required at proposal stage)

CONTRACTOR EMPLOYEE BIOGRAPHICAL DATA SHEET The Privacy Act Statement is found at the end of this form.						
1. Name (Last, First, Middle)			2. Contractor's Name			
3. Employee's Address (include ZIP code)			4. Contract Number		5. Position Under Contract	
			6. Proposed Salary		7. Duration of Assignment	
8. Telephone Number (include area code)		9. Place of Birth		10. Citizenship (If non-U.S. citizen, give visa status)		
11. Names, Ages, and Relationship of Dependents to Accompany Individual to Country of Assignment						
12. EDUCATION (include all college or university degrees)				13. LANGUAGE PROFICIENCY (see Instruction on Page 2)		
NAME AND LOCATION OF INSTITUTION	MAJOR	DEGREE	DATE	LANGUAGE	Proficiency Speaking	Proficiency Reading
14. EMPLOYMENT HISTORY (List last three (3) positions held by the individual)						
POSITION TITLE	EMPLOYER'S NAME AND ADDRESS POINT OF CONTACT & TELEPHONE #		Dates of Employment (M/D/Y)			
			From		To	
15. SPECIFIC CONSULTANT SERVICES (give last three (3) years). Continue on a separate sheet of paper, if required, to provide this information.						
SERVICES PERFORMED	EMPLOYER'S NAME AND ADDRESS POINT OF CONTACT & TELEPHONE #		Dates of Employment (M/D/Y)			
			From		To	
16. RATIONALE FOR PROPOSED SALARY (Provide the basis for the salary proposed in Block 6 with supporting rationale for the market value of the position. Continue on a separate sheet of paper, if required) Salary definition – basic periodic payment for services rendered. Exclude bonuses, profit-sharing arrangements, commissions, consultant fees, extra or overtime work payments, overseas differential or quarters, cost of living or dependent education allowances.						
17. CERTIFICATION: To the best of my knowledge, the above facts as stated are true and correct.						
Signature of Employee					Date	
18. CONTRACTOR'S CERTIFICATION (To be signed by responsible representative of Contractor)						
Contractor certifies in submitting this form that it has taken reasonable steps (in accordance with sound business practices) to verify the information in this form. Contractor understands that USAID may rely on the accuracy of such information in negotiating and reimbursing personnel under this contract. Certifications that are false, fictitious, or fraudulent, or that are based on inadequately verified information, may result in appropriate remedial action by USAID, taking into consideration all the pertinent facts and circumstances, ranging from refund claims to criminal prosecution.						
Signature of Contractor's Representative					Date	