

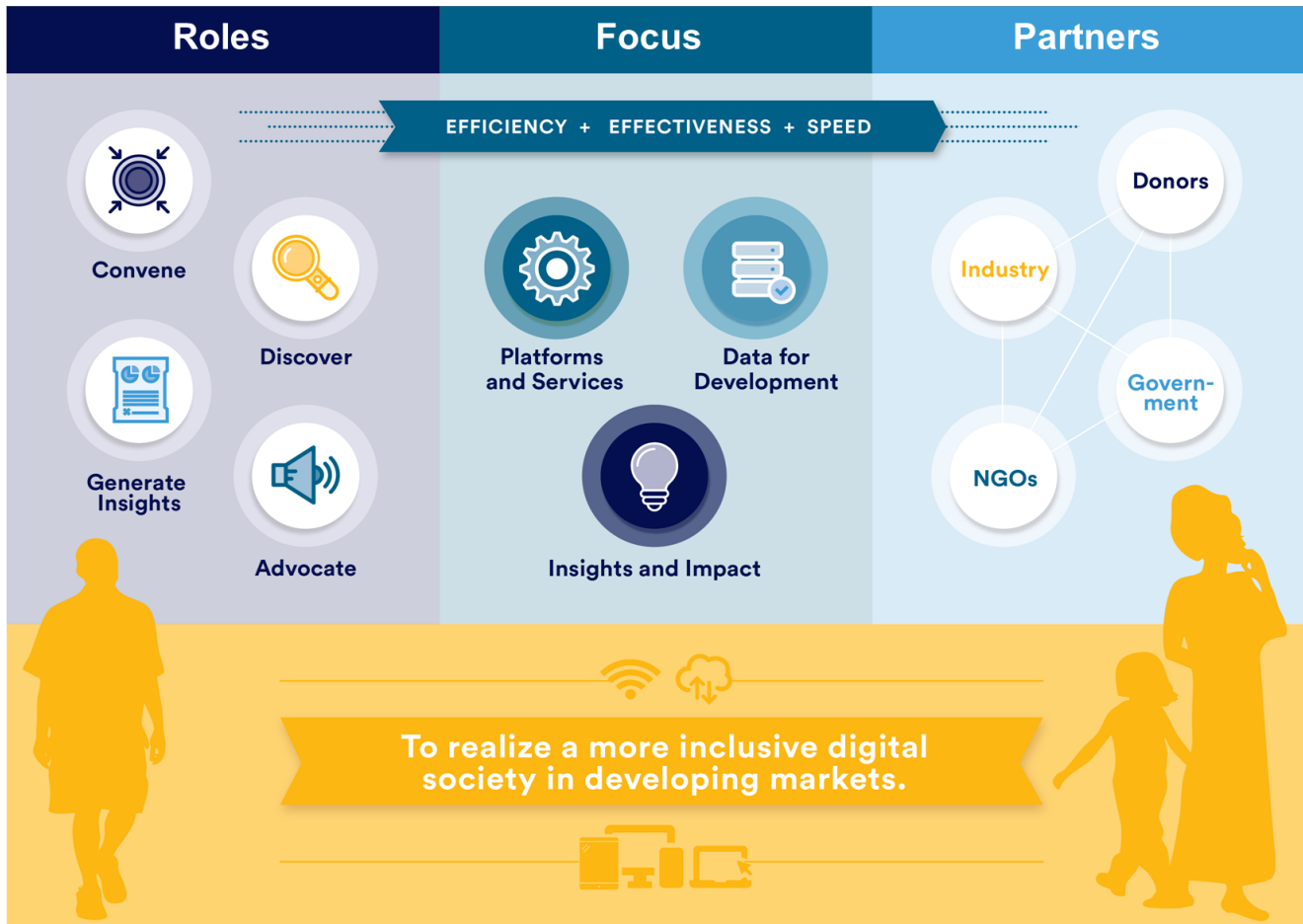
Request for Proposals

Messenger Platforms for Development
May 25, 2017



Background Summary

The Digital Impact Alliance (DIAL) originated to bring together the public and private sectors to realize an inclusive digital society that connects everyone to life-enhancing and life-enabling technology. DIAL is staffed by a global team of technology researchers, developers and investors. It is supported by world-class foundations and development agencies and guided by a board of leading emerging market entrepreneurs, technologists, and development experts. With this leadership, DIAL is positioned to serve as a neutral broker, bring together government, industry, and other development stakeholders to promote new solutions to old problems.



DIAL's role is to convene the community, discover what works and what doesn't, generate insights to help strengthen ecosystem partners, and advocate best practice recommendations.

DIAL is focusing its work in three areas:

- **Platforms and Services (P&S):** DIAL addresses reach and capacity challenges, working to help digital service providers design and deploy their services faster, at a lower cost, and to a wider audience in development markets.

- **Data for Development (D4D):** DIAL accelerates shared value scenarios in technology and economic models, working closely with MNOs and digital data holders. DIAL also supports discussions tackling sensitive privacy and security questions that hinder the public sector and development community's access to and use of data to improve communications and services provided to the people they service.
- **Insights and Impact (I&I):** DIAL produces, curates, and disseminates evidence-based good practices packaged in easy to understand guidance so that governments, technology companies, the development community, and other implementers can quickly use it to inform ongoing efforts to fund, design, and deploy digital services to more people. DIAL then convenes these groups that share advocacy agendas to drive collective impact.

The work outlined below is managed by Insights and Impact in close conjunction with Platform and Services' leadership. It is intended to support Platform and Services' strategic investigation into new platforms for development service delivery.

Scope of Work

1. Problem Statement

Digital service providers are increasingly using internet messengers such as WhatsApp, Telegram, WeChat and Facebook Messenger as channels for delivering digital development services. Advantages include scale, cost and flexibility: WhatsApp and Facebook Messenger have user bases greater than one billion, while the others range from 500 to 900 million users. They do not have per-message fees and their user interfaces are robust, offering menus and multimedia capability (images, voice and video). The platforms also offer APIs for automation (bots), analytics and marketing. Recent studies show that these communications tools are among the most common uses of the internet in developing countries, providing evidence that when people in underserved markets do get online, they do so to use these tools.

Messenger platforms vary, however, in their suitability for development programs. Each offers different capabilities, adaptability, privacy protections and user reach. Development professionals would benefit from greater information on how messenger platforms have been used by others in development programs, and to what effect. They would also gain from a framework through which to consider which platform is best used under what circumstances, and with what advantages and drawbacks. Finally, while adoption is growing quickly, internet messaging is not ubiquitous. Clarity on the challenges that limit development organizations' ability to use messengers to deliver services to more people could inform advocacy efforts with messenger producers to help remove those obstacles.

2. Goals of the Overall Project

The goals of this work are to:

- 1) Understand how messenger platforms are being used for development work;
- 2) Understand whether messenger platforms are effective tools for teams deploying them in development programs, and if so which methodologies, techniques and applications for using messengers appear most effective under what circumstances;

- 3) Provide specific feedback to messenger companies on how their products are being applied in development projects, and what adjustments or additions would make them more effective for the development community.

3. Approach, Project Timeline and Deliverables

We have divided the scope of work into four phases. **Please note that this RFP is for Phases 1, 2 and 3 only.** The timing and execution of Phase 4 will be determined at a later date and will be influenced by the results of Phases 1, 2 and 3. We outline all four here, however, to give a sense of the ultimate goal of the overall project.

Phase 1: Landscape Review

- Develop and deliver a review of approximately 10-12 projects that are using internet messenger platforms in international development programs. This review should cover a diversity of sectors, geographies and target audiences.

The deliverable will be a catalogue of these projects which includes, but is not limited to:

- How the application was used, including program details (how the application fit into the overall program context) and specific details of implementation (including means of interaction, sign-up/registration/adoption, app deployment, training, cost etc.)
 - Strengths and weaknesses of the messenger platform from a **programmatic** view point, looking at the platform's fit within the context, goals, sector and geography for the program (for example, whether it was difficult to train operators to use the platform, or whether people preferred to talk on the phone.)
 - Strengths and weakness from the **technical** perspective (for example, whether a particular API made it difficult to send bulk outbound updates.)
- The review should include programs in which the messenger platform was considered successful and those in which the results fell short of what was anticipated.
 - After developing a list of possible projects to review but before commencing the full research, the consultant should consult with experts not associated with any of the projects to assess whether this list should be adjusted. Reasons for adjusting may be to make it more comprehensive, diverse in geographies or sectors, or representative of the range of experiences using messenger platforms in development programs.

This catalogue and supporting materials, including data collected and interview notes, will be saved in a shared repository with the DIAL team and will feed into Phases 2, 3 and 4 below, as well as potential future exploratory research.

Phase 2: Case Studies

- **Case studies:** Of the initial 10-12 projects reviewed during Phase 1, DIAL will choose 4 - 5 in conjunction with the selected consultant and experts mentioned above to develop into more robust case studies. The case studies should build on the information collected in Phase 1 to further explain details about impact of the messenger platform on the outcomes for the project, and the pros and cons of 1) using a messenger platform in the projects and 2) using that

messenger platform. This work should highlight specific, technical advantages or disadvantages about the messenger platform used that can feed into Phase 3 below.

- **Feedback gathering:** The consultant will conduct in-depth discussions with the digital development experts tapped into in Phase 1 to review the findings of the case studies. In particular, the experts will review the strengths and weaknesses identified for particular messenger platforms.

Phase 3: White paper with Guidance around Features and Uses for Messengers in Development

- **Dedicated guidance** to development practitioners on the effective use of messenger platforms for their programs, and under which circumstances some platforms excel over others. This will take the shape of a brief white paper building upon the results of Phases 1 and 2 and benefiting from the feedback of the experts consulted above.
- **Dissemination:** Presentation of the case studies, white paper and selected material from Phases 1, 2 and 3 on a dedicated microsite. In addition to the material for the microsite, the consultant will write a series of communications that highlight this work with a range of stakeholders, including, but not limited to, blog posts, webinars, TechSalon, etc.

Phase 4: Feedback and Advocacy (not covered by this RFP but included here to show the full possible reach of this effort)

- **Feedback to companies:** Outreach to messenger companies to provide feedback garnered during the above research. Conduct face to face meetings of development implementers and messenger product teams and seek improvement to address certain drawbacks.

4. Project Timeline

The following table reflects the anticipated deliverables and schedule required for this project. Respondents may suggest amendments as part of their proposals, for approval prior to contracting. All deliverables must also be submitted in widescreen format.

#	Deliverable	Description	Estimated completion date
1	Kick off meeting	Kick off meeting, initial charting of projects to cover in Phase 1	Week 1
2	Landscape Catalogue	Initial meeting with expert group and complete landscape review (Phase 1)	Weeks 2-4
3	Case studies	Identification of programs to highlight for Phase 2, discussions and writing case studies	Week 5-8

4	White paper	White paper with guidance around features and uses for messengers in development	Weeks 9-11
5	Dissemination materials	Series of communications that highlight this work with a range of stakeholders	Weeks 9-13
6	Advocacy	As described above	TBD

Role of Consultant

The consultant will be responsible for delivering the above scope of work and deliverables. The consultant will collaborate with the DIAL team on a regular basis, with standing weekly check-ins and weekly reports. It is expected that the consultant will solicit constructive, timely feedback from the DIAL team, specifically on research direction and progress, development projects covered, results presentation and dissemination.

Proposal submission requirements

Proposal submissions, which may be created in Word, PowerPoint, or a combination of the two, must include the following components. Respondents may include additional elements as needed.

- Proposed approach
 - Demonstrate understanding of the project objectives
 - Describe approach and methodologies, as applicable
 - Describe project management approach, including timeline and any recommended updates to timeline provided above, including timing and level of effort on the part of the DIAL team, e.g. to participate in scoping and requirements workshops, iteration junctures, etc.
- Staff and team structure
 - Identify the team structure, including roles, responsibilities, and level of effort of staff and any sub-contracted resources
 - Provide rationale and background on any sub-contracted firms or individuals
- Relevant experience
 - Demonstrate firm and key participants' experience relative to the scope of work
 - Provide at least 3 examples of similar work
- Budget
 - Provide a detailed budget, including assumptions and costs and level of effort for staff and any sub-contractors
 - Provide professional fees budget, including cost and level of effort per staff member
 - Provide separate line item for any sub-contractors
 - Provide expenses budget by type of expenses, e.g. travel, research, etc. Travel estimates should indicate the anticipated destination and duration of each trip
- References
 - Provide names and email addresses of at least two prior clients willing to discuss their experiences working with you.

Submission format and timeline

- All submissions are due on Tuesday, June 13, 2017 by 6:00pm EDT. We expect the submissions to be in the 5-7 page range but will not penalize submissions that are above or below this range.
- Questions and clarifications will be communicated to Respondents between June 14-15, 2017 with a kind request for prompt turnaround on part of the Respondents.
- The selected Respondents will be notified on Monday, June 26, 2017 by 6:00pm EDT
- Please send all EOs and email submissions to RFP@digitalimpactalliance.org
- In case Respondents encounter a problem submitting, please contact Carolyn Florey at cflorey@digitalimpactalliance.org

Questions and answers

Please forward any questions to RFP@digitalimpactalliance.org by Friday, June 2, 2017. DIAL will make every effort to respond to questions within 24 hours, and may choose to share the questions and answers from these bilateral discussions with other Respondents.

Evaluation Process

DIAL will review all written proposals, and may request a phone or in-person interview and/or updated submission to address questions or provide clarification. The evaluation committee will use the following criteria to evaluate candidates' response.

The selection decision will be based on the following criteria:

Criteria	Score (1-5)
1. Approach	
<ul style="list-style-type: none"> • The analytical framework and methodology is capable of answering the project's key questions and deliverables 	
2. Subject Matter Expertise	
<ul style="list-style-type: none"> • Solid understanding of the key dynamics and trends in the relevant substantive areas 	
<ul style="list-style-type: none"> • Appropriate level of understanding of the key stakeholders and dynamics within the ecosystem 	
<ul style="list-style-type: none"> • Key participants can speak with authority and credibility on the key project issues 	
<ul style="list-style-type: none"> • Experience working with emerging markets and the field of global development 	
3. Project Management	
<ul style="list-style-type: none"> • Demonstrated understanding of their proposed scope of work, including overall project structure and how their scope of work relates to other consultants 	
<ul style="list-style-type: none"> • Achievable action plan that will deliver the project on time and on budget 	
<ul style="list-style-type: none"> • Effective staffing and/or team structure 	

Criteria	Score (1-5)
<ul style="list-style-type: none"> Thoughtful risk identification and mitigation strategies 	
4. Capabilities and Experience	
<ul style="list-style-type: none"> Demonstrated firm experience with similar projects 	
<ul style="list-style-type: none"> Team members with demonstrated skills and experience with similar projects and activities 	
<ul style="list-style-type: none"> High-quality sub-contractors and external advisors, if relevant 	
<ul style="list-style-type: none"> Appropriate access to resources and knowledge centers 	
5. Value	
<ul style="list-style-type: none"> The proposed pricing is within budget 	
<ul style="list-style-type: none"> The proposed pricing demonstrates a competitive price and good value for the money 	
<ul style="list-style-type: none"> Development and Emerging Market Experience 	
<ul style="list-style-type: none"> Experience working with emerging markets and the field of global development 	

Intent and disclaimer

This RFP is made with the intent to identify a consultant to deliver results as described in this RFP. DIAL will rely on Consultant's representations to be truthful and as described. DIAL assumes it can be confident in Consultant's ability to deliver the product(s) and/or service(s) proposed in response to this RFP.

If DIAL amends the RFP, copies of any such amendments will be sent to all Respondents.

Contract terms

DIAL will negotiate contract terms upon selection. A copy of the contract terms and conditions will be provided upon selection. All contracts are subject to review by UN Foundation's Business Services Budget Reporting (BSBR) team. Once a draft contract is reviewed by BSBR, DIAL's Grants Manager will contact the Consultant. The project will start upon the execution of the contract. The contract will outline terms and conditions, scope, budget, and applicable flow-down terms.

Release

Consultant understands that DIAL has chosen to solicit an RFP for consulting services, and that Consultant's response does not guarantee that DIAL will enter into a new contract with Consultant or continue any current contract(s) with Consultant.

Consultant agrees that DIAL may, in its sole discretion:

- Amend or cancel the RFP, in whole or in part, at any time
- Extend the deadline for submitting responses
- Determine whether a response does or does not substantially comply with the requirements of the RFP
- Waive any minor irregularity, informality or nonconformance with the provisions or procedures of the RFP

- Negotiate with all consultants UNF deems acceptable
- Issue multiple awards
- Copy the responses

This RFP is not an offer to contract. DIAL assumes no responsibility for Consultant's cost to respond to this RFP. All responses become the property of DIAL.

The Consultant, by submitting a response to this RFP, waives all right to protest or seek any legal remedies whatsoever regarding any aspect of this RFP.

Consultant represents that it has responded to the RFP with complete honesty and accuracy. If facts provided in Consultant's response change, Consultant agrees to supplement its response in writing with any deletions, additions, or changes within ten (10) days of the changes. Consultant will do this, as necessary, throughout the selection process. Consultant understands that any material misrepresentation, including omissions, may disqualify it from consideration for a contract award.

Consultant understands it may receive proprietary and confidential information from DIAL during the RFP process ("Confidential Information"). Consultant agrees to not use Confidential Information for any purpose other than its participation in the RFP process and to not reveal Confidential Information directly or indirectly to any other person, entity, or organization without the prior written consent of DIAL. Consultant further agrees to exercise all reasonable precautions to maintain the proprietary and confidential nature of Confidential Information where it can best demonstrate its value and capacity to delivery ecosystem-wide, meaningful value.