

Section IV: Schedule of Requirements

IATI Data Use Working Group Activity:

Activity to scope content for a 'Virtual training for CSOs and national-level actors in partner countries on how to access, understand and use IATI data.'

Background:

The [International Aid Transparency Initiative \(IATI\)](#) is a voluntary, multi-stakeholder initiative that seeks to increase the transparency of development cooperation and humanitarian activities and increase their effectiveness in tackling poverty and achieving the Sustainable Development Goals. IATI was launched at the Third High Level Forum on Aid Effectiveness in Accra in 2008 and was designed to support donors in meeting their Accra commitments on transparency and simultaneously serve the information needs of developing countries to enable the planning and management of national budgets, based on more accurate and timely information on resource flows.

Since then, the IATI community has expanded considerably, bringing together donor and developing countries, civil society organizations, and other experts in aid information. At the center of IATI is the [IATI Standard](#), a format and framework for publishing data on development cooperation and humanitarian activities.

The initiative is governed by a multi-stakeholder Governing Board, and the Members Assembly, formed of all members of IATI. The Governing Board is supported by a Secretariat located in multiple locations and led by UNDP, which also includes UNOPS and the UK-based organization Development Initiatives.

More than 1,250 organisations have now published data using the IATI Standard, and IATI aims to continually improve the quality of data to support stakeholders to use this information for better decision-making. At the same time, while IATI has been successful in increasing the supply of data since its launch, there is still a need to increase and diversify the usage of the data to inform evidence-based, systemic decision-making at the country level. Likewise, the [2020-2025 IATI Strategic Plan](#) highlights that strengthening the 'demand side', e.g. the use of IATI data, especially from partner countries, should be a strategic priority for IATI programming.

In order to address data use challenges and implement the recommendations from an independent evaluation, in 2017 the IATI Governing Board established an IATI Data Use Fund (DUF). The DUF is administered by UNDP on behalf of the IATI Data Use Working Group (DUWG), a multi-stakeholder group of IATI community members interested in promoting the systemic use of IATI data. In the 2020 the DUWG released a new work plan, which aligns its data use activities to five objectives:

- 1 Understand barriers to data use
- 2 Ensure all users can access the data they need
- 3 Strengthen data literacy and capacity for use
- 4 Document real use cases

Justification of Services:

IATI data provides an essential window into what projects are taking place where, who's funding them and what results are being achieved - and this data is free and openly available for anyone to use, including partners from civil society. Civil society can be understood as a third sector of society, distinct from government and business. Civil society organizations (CSOs) include community

groups, non-governmental organizations (NGOs), labor unions, indigenous groups, charitable organizations, faith-based organizations, and professional associations, among others.

When mobilized, civil society has the power to influence the actions of elected policy-makers and businesses, and thus civil society is an important partner for achieving IATI's mission of improving the transparency of development and humanitarian resources worldwide. Civil society organisations can use IATI data to hold authorities to account, to coordinate efforts and avoid duplicating services, and to signpost local people to other civil society organizations that can help them. In addition, civil society organisations can also use IATI data to see how transparent donors are about their spending and to campaign for improvements.

To date, the focus of IATI's engagement with civil society has largely been focused on the demand side: supporting civil society organizations to publish data on their own budgets, expenditures, and activities to IATI. However, given the focus of the DUWG and rationale for strengthening ties with civil society as outlined above, increasing training opportunities for civil society and other local partners in developing countries around how to access and use IATI data is paramount for achieving better transparency of development and humanitarian resources worldwide.

Scope of Work:

As such, IATI is seeking to engage a service provider to design the concept and content for a comprehensive (virtual) introductory course on development cooperation / IATI data and its uses for members of civil society organizations, specifically those who are located in developing countries with limited or no previous IATI knowledge.

The virtual training course will have three main aims:

- 1 To introduce members of civil society in developing countries to the conversation around transparency of development cooperation resources, including through an overview of national and global sources for development cooperation data.
- 2 To familiarize members of civil society in developing countries with IATI, what types of IATI data is available, how they can access and use it, and for what purposes it can be used.
- 3 To familiarize members of civil society in developing countries with IATI's data access tools (TBD in consultation with the Secretariat) and provide a basic understanding of how to access, analyze, interpret and understand the data for their own needs, including finding data with local relevance.

Guiding Principles for Course Development:

- The online course should be developed as a 4-6 week, self-paced introductory course with a total time commitment of 16-20 hours. The course should be organized into specific "modules", beginning with an overview page that outlines all readings, tasks and assignments required for each module.
- The location of reading materials, assignments, tasks, collaborative opportunities, etc. should always be in the same location and format. In addition, each module should look like the previous modules, with updated content and learning outcomes.
- To the extent possible, the course should be "self-sufficient," meaning that little to no manual intervention is necessary by the IATI Secretariat for learners to complete the course.
- Students should demonstrate their understanding of the content as well as heighten their engagement with the content throughout the course. Course design should incorporate activities that connect real-world relevance and content knowledge (e.g. examining case studies, creating problem-based scenarios in which the students research the problem and create solutions or address gaps within the problem, etc.).

Outputs and Activities (note: submissions and final deliverables are requested in English as the primary project language):

- **Series of interviews with relevant IATI and non-IATI community members from civil society organizations in developing countries and complementary desk research to understand and outline the most relevant course content (i.e. what are the most critical learning needs for civil society in partner countries in regards to the main aims outlined above?).**
- **Inception report detailing outcomes from interviews and desk research, including a proposal for the course outline for review / approval by the IATI Secretariat and Data Use Working Group.**

The inception report should detail what was learned from the desk review / series of interviews with IATI stakeholders in regards to CSO learning needs. It should also include at a minimum:

- An assessment of any anticipated challenges with delivering the training, given current availability of IATI data access tools¹;
- Analysis of and recommendation for the most appropriate format for delivering training (e.g. Moodle, MOOC, tailored country-specific activities, etc.);
- A proposal for the most relevant course content (i.e. what are the most critical learning needs for civil society in developing countries in regards to the main aims outlined above?); and
- The proposed outline for the course and details of what would be covered under each module (e.g. module aims and relevant interactive activities - quizzes, assignments, readings, etc.).
- . For instance, a *possible* course outline, could be:
 - [Module 1] What is the role of civil society in using development cooperation data to increase transparency (IATI data and beyond)?
 - Sub-topic A
 - Sub-topic B
 - [Module 2] What is IATI and what kind of data can I find?
 - Sub-topic A
 - Sub-topic B
 - [Module 3] How can civil society actors use IATI data and for what purposes?
 - Sub-topic A
 - Sub-topic B
 - [Module 4] How do I use IATI tools to access and understand the data I need (i.e. data for local context)? What challenges should I be aware of when analyzing IATI data?
 - Sub-topic A
 - Sub-topic B

- **Final course content in line with the guiding principles outlined above.**

This content should be delivered in a Word document in English or other easily shareable format in English, as a vendor will be engaged to design / implement the course. As such, the document should be as comprehensive as possible - i.e. it should contain at a minimum:

- The course outline, fully fleshed out with comprehensive course text and other content (e.g. quizzes, assignments, readings, etc.).
- Overview pages for each “module” that outline all readings, tasks and assignments required.
- Course design should incorporate activities that connect real-world relevance and content knowledge (e.g. examining case studies, creating problem-based scenarios in

¹ The IATI Secretariat will provide the supplier with pointers about how to download a subset of data containing extracts from different tools in CSV or Excel format.

which the students research the problem and create solutions or address gaps within the problem, etc.).

- *Note:* the IATI project team may request up to four revisions to the course content and will facilitate sign off from the DUWG.

Timeline

- *By 27-28 May:* Kickoff with project team.
- *By 17 June:* Series of interviews with relevant IATI and non-IATI community members from civil society and complementary desk research to understand and outline the most relevant course content.
- *By 14 July:* Inception report detailing outcomes from interviews and desk research, including a proposed course outline for review / approval by the IATI Secretariat and Data Use Working Group.
- *By 18 August:* Fully developed course content delivered.

Schedule of Payments

Outputs	Percentage of total Contract Value
The first payment will be realised after the inception report (deliverable) has been reviewed and approved by UNDP and UNOPS	40%
The final payment will be realised after review and approval of the final course content (deliverable) by UNDP and UNOPS.	60%

Minimum requirements/qualifications of the successful team / organisation

- Previous experience conducting needs assessments to understand core issues to be included in instructional design or training materials, evaluated from statement of experience, team members' CVs and provision of links to previous courses or trainings (required)
- Methodology outlining how the bidder intends to implement this project. (required)
- Team leader with 10+ years of experience in international development, transparency, development cooperation and / or open data. (required)

- 3+ years' demonstrated ability providing training or support to civil society organizations or similar, including in online / e-learning (e.g. including statement of experience and provision of links to previous courses or trainings). (required)
- 3+ years' experience creating training resources / materials (e.g. multi-week learning courses, etc.) for civil society audiences or similar (e.g. including statement of experience and provision of links to previous courses or trainings). (preferred)
- Previous experience or familiarity with the International Aid Transparency Initiative (IATI), preferably gained through working with publishers, data users or similar, to be evaluated from provision of team members' CVs. (preferred)
- Excellent network of civil society organizations at different levels (e.g. regional to local) to leverage for the desk research and interview stage, evaluated based on CVs, statements of experience, and / or past projects submitted. (preferred)

Evaluation Methodology and Qualifying Criteria

The panel will evaluate proposals using the cumulative analysis methodology by completing the following steps of the evaluation process:

1. Preliminary screening of proposals, including an assessment of whether proposals comply with the formal and eligibility criteria. All proposals substantially compliant at this stage will go through the subsequent evaluation stages. Proposals will be evaluated based on Pass/Fail criteria. During preliminary evaluation panel may require bidders to provide any additional clarifications.

2. Evaluation against qualification criteria, determining which proposals are substantially compliant to the qualification criteria, and rejecting non-compliant proposals. Only proposals meeting or exceeding the qualification criteria shall qualify for further technical evaluation. Proposals will be evaluated based on Pass/Fail criteria.

3. Technical evaluation (technical criteria), determining the technical points achieved by each proposal, as per the scale assigned per criterion. Only proposals that meet the minimum technical threshold of 70% of the maximum potential score shall be considered for financial bid opening. Thus, the minimal technical threshold shall constitute 49 (forty-nine) points.

4. Financial evaluation will be performed only for proposals that achieve the minimum technical threshold. Proposals will be checked for any arithmetical errors.

The maximum number of points for the Financial Proposals is 30.

This maximum number of points will be allocated to the lowest price financial proposal.

Financial proposals from other technically compliant offerors will receive points in reverse proportion according to the following formula: $30 \text{ points} \times \text{lowest price} / \text{quoted price}$. The winning proposal will be the one with the highest number of points after the points obtained in both technical and financial evaluations. The contract will be recommended to the Bidder that submitted the winning proposal.

Evaluation Matrix with Technical Criteria

Summary of Technical Proposal Evaluation Form		Maximum obtainable points	Company		
			A	B	C
1	Clear methodology outlining how the bidder intends to implement this project. Max 18 points	18			

2	Previous experience conducting needs assessments to understand core issues to be included in instructional design or training materials, evaluated from statement of experience, team members' CVs and provision of links to previous courses or trainings. Max 10 points	10			
3	Team leader with 10+ years of experience in international development, transparency, development cooperation and open data prior to this tender Max 10 points.	10			
4	3+ years' demonstrated ability providing training or support to civil society organizations or similar, including in online / e-learning (e.g. including statement of experience and provision of links to previous courses or trainings) Max 10 points.	10			
5	3+ years' experience creating training resources / materials (e.g. multi-week learning courses, etc.) for civil society audiences or similar (e.g. including statement of experience and provision of links to previous courses or trainings). Max 10 points	10			
6	Previous experience or familiarity with the International Aid Transparency Initiative (IATI), preferably gained through working with publishers, data users or	7			

	similar, to be evaluated from provision of team members' CVs. Max 7 points.				
7	Excellent network of civil society organizations at different levels (e.g. regional to local) to leverage for the desk research and interview stage, evaluated based on CVs, statements of experience, and / or past projects submitted. Max 5 points.	5			
		70			

Recommended Presentation of Offer

- Maximum 5 page offer setting out a clear methodology showing how the bidder will implement the task, detailing the company / individual's key qualifications and how they align to the minimum requirements and evaluation requirements detailed here, including links to previous work as available / appropriate.
- Detailed budget for the services described above, presented in USD. Budget shall be itemized and demonstrate separately personnel (rates, number of man-days/weeks/months and total) and other costs.
- CVs on all members of the intended project team. There is no maximum number of project team members, however it should be indicated which of the team will be the main focal point for engaging with UNOPS / UNDP.
- Statement of experience and links to previous work to support evaluation criteria as outlined above.
- All returnable bidding forms and other supporting documents as indicated in the esourcing

Gender and other considerations:

- Woman owned businesses and companies with qualified female key personnel are strongly encouraged to apply to this tender.
- Companies from different regions are encouraged to apply. The bidder is encouraged to demonstrate how the organization plans to integrate sustainability measures in the execution of the contract, if selected.