

REQUEST FOR PROPOSAL

**Title: Population-based HIV Impact Assessments (PHIA) Project Products and Data Visualization**

**Due Date/Time: July 6th, 2020, 11:59pm**

**ICAP Representatives:**

**Natazia Fistrovic, Senior Program Officer; Apala Guhathakurta, Communications Officer**

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**Note:** Please include “RFP” in the subject for all inquiries and submissions.

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# INFORMATION AND INSTRUCTIONS TO BIDDERS

## Section 1: General Information for Bidders

**Introduction**:

Subject to the conditions set forth in this Request for Proposal, ICAP at Columbia University is requesting Bids for the following project:

**Bid Name**: Population-based HIV Impact Assessments (PHIA) Project Products and Data Visualization

**Bid Deadline**: July 6th, 2020 11:59pm EST

**Submission of Bids:** Natazia Fistrovic, Apala Guhathakurta, Jacqueline Maxwell as above

Bidders must submit their Bids by email. ***Faxed or paper Bids will not be accepted.***

### Definitions

Except as otherwise specifically provided, definitions are set forth as follows:

***ICAP –*** *Refers to ICAP at Columbia University.*

***Columbia***— Refers to Columbia University.

***Request for Proposal (RFP)*** - Refers to the document named ICAP’s Request for Proposal of Population-based HIV Impact Assessments (PHIA) Project Products and Data Visualization.

***Addenda*** — Refers to the written or graphic instruments issued by the ICAP Representative prior to the Bid Deadline, which modifies or interprets the RFP by additions, deletions, clarifications, or corrections.

***Bidder*** – Refers to the firm that is interested in and/or responds to the RFP.

***Bid***- Refers to all documents that the Bidder must submit to the ICAP Representative prior to the Bid Deadline.

***Bid Deadline*** - Refers to the date and time indicated in the RFP as the latest date and time that a Bid will be accepted.

***Contract*** *–* Refers to the final agreement reached between the successful Bidder and Columbia University.

***Contractor*** - The term Contractor shall mean the successful Bidder awarded the Contract.

***Subcontractor***— The term Subcontractor shall mean any individual, company, or corporation to whom the Contractor assigns any part of the Contract.

### Code of Conduct and Fair Competition

It is the responsibility of the Bidder to notify the ICAP Representatives in writing of any possible conflict of interest as set forth below. Columbia/ICAP will investigate the matter and determine if an actual conflict of interest exists.

A conflict of interest arises when a Columbia employee, officer, or agent involved in the RFP process or Contract has a financial or any other interest in a Bidder. If a conflict of interest exists, the Bidder may not submit a Bid.

Columbia employees, officers, and agents may neither solicit nor accept gratuities, favors, or anything of monetary value from Bidders, Contractors, or parties to sub-agreements. Any such actions must be reported to the Columbia Representatives immediately.

Columbia /ICAP reserves the right to cancel the award if, in its sole discretion, it determines that any interest disclosed from any source could give the appearance of a conflict or cause speculation as to the objectivity of the program to be developed by the Bidder. Columbia /ICAP’s determination regarding any questions of conflict of interest shall be final.

### Compliance with Federal, State and Local Laws

Bidder warrants in submitting a Bid and in the performance of an award as a result of the Bid, that Bidder has complied with, or will comply with, all applicable federal, state, University, and local laws, ordinances and all lawful orders, rules and regulations hereunder. The Bidder, by submitting the Bid or performance that results from an award by Columbia, agrees not to discriminate against any employee or applicant based on an individual's race, color, religion, religious creed, ancestry, national origin, age (except minors), sex, sexual orientation, marital status, medical condition (cancer-related) and disability, and otherwise as required or permitted by law. Bidder further agrees that any sub-contract will contain a provision requiring non-discrimination in employment as specified above. Any breach of this provision may be regarded as material breach of contract and cause for cancellation.

### Limitation of Liability

ICAP makes no representations, warranties, or guarantees that the information contained herein is accurate, complete, timely, or that such information accurately represents the conditions that would be encountered in pursuing the work or at the site(s) of work now or in the future. The furnishing of such information by ICAP shall not create or be deemed to create any obligation or liability upon it for any reason whatsoever and each Bidder, by submitting its Bid, expressly agrees that it has not relied upon the foregoing information, and that it shall not hold Columbia/ICAP liable or responsible therefore in any manner whatsoever. Accordingly, nothing contained herein and no representation, statement, or promise, of Columbia, its directors, officers, agents, representatives, or employees, oral or in writing, shall impair or limit the effect of the warranties of the Bidder required by this Request for Proposal and that it shall not hold Columbia/ICAP liable or responsible therefore in any manner whatsoever.

Neither the Trustees of Columbia, nor any officer, agent, or employee thereof shall be charged personally with any liability by a Bidder or another or held liable to a Bidder or another under any term or provision of this RFP or any statements made herein or because of the submission or attempted submission of a response hereto or otherwise.

### Qualification of Bidder

Bidder must possess the potential ability to perform successfully under the terms and conditions set forth in the RFP. Consideration shall be given to such matters as Bidder integrity; record of past performance; and financial and technical resources*.*

ICAP shall make such investigations as deemed necessary to determine the ability of a Bidder to provide the specified equipment and perform professional services.

ICAP reserves the right to reject any Bid if the evidence submitted by, or investigation of, such Bidder fails to satisfy ICAP that said Bidder is properly qualified to carry out the obligations of the final Contract.

## Section 2: Submission of Bids

### Intent to Bid

Bidders must notify both ICAP Representatives indicated above by email, regarding the following:

* State your organization’s intent to bid, by June 29th, 2020

### Preparation of Bid

By submission of its Bid, the Bidder agrees that the Bid is predicated upon the acceptance of all the terms and conditions stated in the RFP, unless specifically excluded by the Bidder in its Bid. Part or all of the RFP and the successful Bid may be incorporated into the Contract.

Each Bidder shall furnish the information and documents required by the RFP. Failure to submit all required information may deem a Bid as non-responsive. Columbia is exempt from Federal Excise Taxes and is also exempt from New York State and local sales or use taxes. All costs associated with the Contract must be stated in United States currency. By submitting a Bid, Bidder certifies that the prices proposed have been arrived at independently, without consultation, communication, or agreement for the purpose of restricting competition as to any matter relating to such prices with any other Bidder or competitor. Bidders are cautioned to write all descriptions and prices clearly so there is no doubt as to the intent and scope of the Bid.

A person who is legally authorized to bind the Bidder to a Contract shall sign the Bid. A Bid submitted by an agent shall have a current Power of Attorney attached, which evidences the agent’s authority to bind the Bidder. The person signing the Bid shall initial erasures or other changes.

Unnecessarily elaborate Bids beyond what is sufficient to present a complete and effective Bid are not desired and may be construed as an indication of the Bidder’s lack of cost consciousness. Elaborate artwork is neither necessary nor desired. The cost incurred for the preparation of the Bid is the sole responsibility of the Bidder. Columbia does not assume any liability for any pre-contract activity and/or cost incurred by Bidders responding to this RFP.

Bid information is not considered confidential or proprietary. Trade secrets and other proprietary data contained in Bids may be held confidential if the Bidder requests, in writing, that ICAP does so, and if ICAP agrees, in writing, to do so. Material considered confidential by the Bidder must be clearly identified. Such confidential/proprietary information must be easily separable from the non-confidential sections of the Bid. Marking the entire Bid as proprietary will be neither accepted nor honored. Notwithstanding any of the foregoing, ICAP reserves the right to use any of the ideas presented in any reply, Bid, discussion, negotiations, or presentation related to the RFP.

If a Bidder intends to use subcontractor(s), the Bidder must identify in its Bid the names of the subcontractors and the portions of the work the subcontractors will perform.

### Communications Regarding the RFP

**Requests for clarification and interpretations of the RFP must be made in writing during the period of June 29 to July 2, 2020 to Natazia Fistrovic and Apala Guhathakurta.**

All questions regarding the RFP shall be directed to the ICAP Representatives by e-mail. Two types of questions generally arise. One may be answered by directing the questioner to a specific section of the RFP. Other questions may be more complex and may require a written amendment to the RFP. The ICAP Representatives will make that decision.

The ICAP Representatives shall make clarifications, interpretations, corrections, and changes to the RFP by written Addenda as specified below. **Questions will not be answered and clarification will not be given after July 2, 2020.**

### Addenda to RFP

Addenda to the RFP will be issued in writing and will be communicated to all Bidders by e-mail and shall become part of the RFP. If the RFP is amended, all terms and conditions that are not modified by the Addenda remain unchanged and in effect as written. If an addendum is issued after Bids have been received and/or after a short list has been developed, the addendum may be provided only to those who submitted Bids or only to those on the short list, in the sole discretion of ICAP.

Each Bidder shall be responsible for making sure it has received all issued Addenda prior to submitting a Bid. **Addenda may be issued through July 2, 2020.**

ICAP reserves the right to change the RFP schedule and to issue addenda. ICAP also reserves the right to cancel, reissue, or to make corrections or amendments to the RFP due to errors or changes identified by ICAP or suggested by a Bidder, and to otherwise modify the terms of the RFP at any time in its sole discretion.

### Proposal Format

The Bid must include all Bid Parts indicated below. Declaration and contract acknowledgement should be completed (but otherwise unchanged), printed, signed, and scanned. Other sections must be filled in as indicated. Bidder should include all necessary attachments when submitting their proposal.

### Submission of Bids

Bids are to be received at the designated email addresses on or before the date and time specified as the Bid Deadline in the RFP. **Oral, telephone, paper, or facsimile Bids will not be considered**. Bidder assumes full responsibility in assuring that its Bid is received by the Bid Deadline.

Bids shall be submitted as follows:

1. Emailed to the ICAP Representatives specified on the cover page of this RFP,
2. Contain “RFP” in the Subject: field,
3. Show the Bid Name, **“Population-based HIV Impact Assessments (PHIA) Project Products and Data Visualization”**,
4. Give the Bidder’s name, primary contacts address, and
5. Show the date and time of the Bid Deadline as specified in this RFP

ICAP, or any ICAP representatives, will not be held responsible for the pre-opening of, post-opening of, or the failure to open a Bid not properly addressed and identified.

### Alternate or Substitute Bids

Bidders may submit more than one Bid. Alternate or substitute Bids must comply with the terms and conditions of the RFP and must contain all required documents as specified in the RFP.

ICAP is seeking Bids that meet its **minimum** requirements as outlined in the Scope of Work. If more than one method of meeting these requirements is proposed, each should be labeled primary, secondary, etc., submitted separately, and they will be evaluated in the specific priorities.

### Late Submissions, Modifications, and Withdrawals of Bids

*Late Bids*: Bids received after the specified Bid Deadline will not be considered and shall be deleted without being read.

*Bid Modifications:* Prior to the Bid Deadline, a submitted Bid may be modified by email notice, signed by a duly authorized person on behalf of the Bidder, to the ICAP Representatives. The notice shall be worded as not to reveal the amount of the original Bid.

Bid Modifications must contain all required documents as specified in the RFP. Failure to submit all required information can deem the Bid Modification as non-compliant and the contents of the Bid Modification will not be considered.

A previously submitted Bid will not be returned, unless written notice, signed by a duly authorized person, from the Bidding Company is received by the ICAP Representative.

*Bid Withdrawal Notifications*: Prior to the Bid Deadline, a submitted Bid may be withdrawn by written notice to the ICAP Representative up until the Bid Deadline. Written requests to withdraw must be signed by a duly authorized person on behalf of the Bidder and shall not reveal the amount of the Bid. Bids may not be modified or withdrawn after the Bid Deadline.

A withdrawn Bid may be resubmitted prior to the Bid Deadline. All resubmitted Bids must fully comply with the RFP. ICAP will only consider the latest version of the Bid.

## Section 3: Evaluation of Bids

### Opening of Bids

The assigned ICAP Representatives will not accept Bids after the specified date and time. Bid services and pricing will not be publicly announced. Bids will be reviewed and evaluated by ICAP. At any time, and from time to time after the opening of the Bids, ICAP may give oral or written notice to one or more Bidders to furnish additional information relating to its Bid and/or qualifications to perform the services contained in the RFP, or to meet with designated representatives of ICAP. The giving of such notice shall not be construed as an acceptance of a Bidder’s Bid.

All materials submitted in response to this RFP become the property of ICAP. Selection or rejection of a response does not affect this right. All copyright of materials produced under any contract or subcontract awarded as a result of this RFP shall be retained by ICAP. All forms of documents and data generated as a result of this contract are owned by and shall be delivered to ICAP at the direction of the ICAP Representative. During the period of performance, the information may not be disclosed by the Bidder to third parties, except as expressly provided in the Contract, without the written permission of the Executive Director of Purchasing.

### Postponement of Bid Opening

If an emergency or unanticipated event interrupts normal University processes to cause the postponement of the scheduled Bid opening or the issuance of an addenda, the ICAP Representative will issue, in writing, to all Bidders, the new timeline and process.

### Bid Evaluation and Selection Criteria

**Evaluation Criteria**

ICAP may use a variety of procedures and techniques in evaluating Bids and Bidders, including, but not limited to: creating a short list of Bidders; using upset levels, banding, comparative pairing, and price conversion techniques; requesting Best and Final Offers; conducting discussions, oral interviews and presentations, site visits, and negotiations; checking references; determining financial capability; and performing reevaluations of Bids as necessary. Through use of any procedure or technique, ICAP may limit the number of Bids to one or more that it will continue to consider. ICAP reserves the right to reject any Bid that does not meet prerequisites or minimum requirements or which scores below average on any of the criteria.

**Selection**

ICAP reserves the right to make an award without further discussion of the Bids submitted; there may be no best and final offer procedure. Interviews and negotiations may be conducted with one or more of the Bidders, but there shall be no obligation to receive further information from any Bidder. Therefore, each initial offer should contain the Bidder’s best terms from a cost or price, service, and technical standpoint.

ICAP may consult references familiar with the Bidder regarding its prior operations and projects, financial resources, reputation, performance, or other matters. Submission of a Bid shall constitute permission for ICAP to make such inquiries and authorization to third parties to respond thereto. ICAP may elect to initiate contract negotiations with one or more Bidders including negotiation of costs/price(s) and any other issues or terms and conditions, including modifying any requirement in the RFP. The option of whether or not to initiate contract negotiations rests solely with ICAP. No Bidder shall have any rights against ICAP arising from such negotiations. The Bidders will be responsible for their travel and per diem expenses, required for any presentations, discussions, and/or negotiations.

ICAP reserves the right to award the Contract to a supplier other than the Bidder presenting the lowest price. The Contract resulting from this solicitation will be awarded to the Bidder(s) whose Bid(s) ICAP believes will be the most advantageous to ICAP. The release of the RFP does not compel ICAP to purchase or to make an award. ICAP shall not be obligated in any manner to any Bidder whatsoever until a written Contract has been duly executed relating to an approved Bid.

ICAP reserves the right to award multiple contracts for the products, work and/or services that are the subject matter of this Bid and Bidder(s) are hereby given notice that they may not be ICAP’s only Contractor or Bidder for such products, work and/or services.

As a result of the selection of a Bidder to supply products and/or services to ICAP, ICAP is neither endorsing nor suggesting that the Bidder’s product or service is the best or only solution. The Bidder agrees to make no reference to Columbia University or ICAP in any literature, promotional material, brochures, sales presentation, or the like without the express written consent of ICAP.

The Bidder will be expected to enter into a Contract with ICAP which is substantially the same as the contract included with this RFP. In no event is a Bidder to submit its own standard contract terms and conditions as a response to this RFP. If a Bidder objects to any of the provisions of ICAP’s standard contract, it must identify in the Bid any clauses which are unacceptable and the reasons or problems, and propose alternatives. The foregoing should not be interpreted to prohibit either party from proposing additional contract terms and conditions during negotiation of the final contract.

### Rejection of Bids

ICAP has the right to reject any and all Bids for any reason.

### Notification of Award

The ICAP Representative will issue “Notification of Award” letter(s) once a selection has been made.

## Section 4: Background Information

### Organizational Context

**ICAP at Columbia University**

A global health leader situated at ICAP at Columbia University has worked since 2004 with one central goal: to improve the health of families and communities.

Working hand-in-hand with individuals at every level of the health system–from patients to health care providers to government officials–ICAP is dedicated to delivering high-performing health system strengthening initiatives that provide quality and affordable health care. The organization tackles the world’s most pressing health threats and, in collaboration with partners around the world, implements transformative solutions to meet the health needs of individuals.

With its roots in comprehensive, family-focused HIV services, ICAP is known for capacity building and for its innovative, effective, and ethical programs that are implemented in the most challenging resource-limited settings. ICAP is also known for its collaborative and supportive approach to strengthening government health systems and local partners’ capacity to deliver quality health services. To date, ICAP has worked to address major public health challenges and the needs of local health systems in more than 3,300 sites across 21 countries.

**The Population-based HIV Impact Assessment (PHIA) Project**

Since 2014, the purpose of the Population-Based HIV Impact Assessment (PHIA) Project is to assess the current status of the HIV epidemic in selected countries through nationally representative, population-based surveys, and to describe the reach of HIV prevention, care and treatment interventions in order to inform programs and policies.

From 2014-2018, this project, funded by the United States President’s Emergency Plan for AIDS Relief (PEPFAR), conducted 13 surveys in countries most affected by the HIV epidemic and with a strong PEPFAR presence, in close collaboration with the United States Centers for Disease Control and Prevention (CDC), international partners, and in-country stakeholders, including each country’s Ministry of Health (MOH). In 2019, ICAP was awarded with additional funding from PEPFAR through CDC to conduct an additional 6 surveys during the five-year project period (December 31, 2018 – September 29, 2025) to assess the latest progress toward HIV epidemic control.  
  
Summer 2020 marks the completion of important milestones for the PHIA Project, including completion of data collection in the first two countries (Zimbabwe and Lesotho), and partial PHIA data collection in two countries – Uganda and Malawi. Surveys in Eswatini and Mozambique are anticipated to start later this year. It will also be a period when final reports from prior (2017-2018) PHIA surveys will be released, including from Rwanda, Cameroon, Cote D’Ivoire, Kenya, and Haiti.  
  
To ensure the results from these surveys are widely and strategically disseminated to a variety of stakeholders, ICAP is looking for a communications agency with experience in web and product design to support the development of PHIA project summary sheets, final reports, and update of the data visualization site.

### Vendor’s Role

ICAP is looking for a communications agency with experience in web and product design to design and layout PHIA products (phia.icap.columbia.edu) and re-design and maintain the PHIA project's interactive data visualization site (phia-data.icap.columbia.edu).   
  
For products, this includes development of a standard template for a summary sheets and final reports and layout of documents with standard figures and graphs. For data visualization, a visual redesign, regular maintenance and updating of the platform is needed in consultation with the PHIA data team.  
  
Each product will involve designing a cover page, basic proofreading of text, formatting text and tables, designing graphs and maps, and formatting the annex pages. Formatting services will also be required for documentation and manuals related to datasets. Approximately 4-6 rounds of review will be required for finalization of the reports assuming good accuracy and fidelity to templates and style guides on the first draft. Printing of the summary sheets and final reports will be required.  
  
The data website requires regular updating to incorporate new data in line with the release of final reports. The data site should be user-friendly, interactive and allow researchers, policy-makers, program implementation staff working on HIV to access national and subnational level summary PHIA data. The public dataset, log-in, registration and help pages should also be maintained in coordination with the PHIA data team. Future improvements to the data visualization should be anticipated after the initial re-design.

# BID PART I: BIDDER'S DECLARATION

This Bid is in response to ICAP’s request for a proposal (“RFP”) to produce products and manage the data visualization site for the Population-based HIV Impact Assessments (PHIA) Project.

This Bid consists of:

Bid Part I - Bidder’s Declaration

Bid Part II - Bidder Questionnaire

Bid Part III - Scope of Work (“SOW”)

Bid Part IV - Proposed Timeline

Bid Part V - Bidder Background and Capacity

Bid Part VI - Financial Proposal

Bid Part VII - Contract Acknowledgement (with any exceptions to Columbia Terms & Conditions)

and

Appendix A (Columbia’s Standard Contract)

Bidder agrees to perform in accordance with all provisions of the RFP documents and any addenda thereto, except as may be specifically stated in this Bid, at the prices set forth herein.   
  
Bidder agrees that this Bid is a firm offer to ICAP which cannot be withdrawn for 60 calendar days from and after the Bid due date.

Bidder certifies that it has thoroughly examined and fully understands all of the provisions of the RFP and the conditions of the contract documents attached thereto, as well as any addenda issued prior to the due date; that it has carefully reviewed and fully supports the accuracy of its Bid; has satisfied itself as to the nature and location of all work, the technical, general, and local conditions to be encountered in the performance of any work, the requirements of the Contract and all other matters which may in any way affect performance or the cost thereof; and that ICAP shall not be responsible for any errors or omissions on the part of the undersigned in preparing this Bid.   
  
If awarded a Contract, Bidder agrees to execute the Contract and deliver it to ICAP within 15 calendar days, of such award, along with any required certificates of insurance.

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Authorized Signatory Title  
  
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Email Address DUNS Number

# BID PART II: BIDDER QUESTIONNAIRE

## A. Bidder Business Structure

1. Provide your company's name and address, and the primary RFP contact's name, phone number, e-mail address, and fax number.
2. Please provide the location of each of your firm's offices. Indicate which office would service this account.
3. Please list your firm's lines of business and the approximate contributions of each business to your organization's total revenue. If you are an affiliate or subsidiary of an organization, what percentage of the parent firm's total revenue does your subsidiary or affiliate generate?
4. Is Bidder incorporated? If so, in what state and as what type of corporation?

## B. Bidder Financial Information

1. Please provide your Dun and Bradstreet (DUNS) Number, if any.
2. Please provide your current DUNS rating:
3. Please provide your Standard and Poor’s rating:
4. Bidder must attach its most recent annual report or certified financial statement as well as most recent SEC 10K filing.
5. Please provide your previous year’s revenues.
6. What percentage of Bidder’s annual revenues would any contract resulting from this Bid represent?
7. Please describe any subcontractor relationships that would be involved in the support of any Columbia contract. (use of any subcontractor requires Columbia approval in advance. Failure to do so may result in termination of contract.)

## C. Business Information

1. List any material claim asserted or threatened against Bidder that may have a significantly adverse effect on Bidder or adversely affect Bidder’s ability to provide the goods or services required by this RFP.
2. List any business issue currently confronted by Bidder that may have a significantly adverse effect on Bidder or adversely affect Bidder’s ability to provide the goods or services required by this RFP.
3. List 3 of your customers using the service covered by this Bid similar in size, industry sector, and geographical presence to Columbia. Please provide:
   1. Customer name and address
   2. Customer employee size
   3. Contact names and telephones (business and technical)
   4. Brief description of the service provided
   5. How long has Customer been using Bidder to provide services?
4. List information regarding 2 of your customers (must currently be operational) previously using Bidder to provide services that **no** longer is using Bidder to do so. Please provide:
   1. Customer names and addresses
   2. Describe service provided by Bidder
   3. Contact names and telephones
   4. How long were these Customers using Bidder to provide the service?
   5. Why did these Customers cease their business relationship with Bidder?
5. Describe other current products/services Bidder has provided to Columbia (if applicable).
6. Describe any existing or pending contracts between Bidder and Columbia.
7. List the name and location of primary individual(s) who would be responsible for our account and provide brief biographies including titles, functions, academic credentials, and relevant experience. Include the role of each consultant for this assignment, the role of back-up personnel, and how many clients are assigned to each person named above.

## D. Minority and Local Plan

It is the policy of Columbia to promote and increase the participation of minority-owned business enterprises (“MBEs” or “MWLs”) as suppliers and second-tier providers. An MBE is defined as a business enterprise more than 50% of which is owned by women or minorities. To the extent practicable, maximum opportunity shall be given to qualified MBEs to participate as suppliers and contractors to Columbia. All qualified suppliers are provided equal opportunity to compete and participate in the Columbia’s procurement process subject to all the established purchasing policies and procedures.

1. Is the ownership of Bidder *(check all that apply)*:
   1. American Indian or Alaskan Native?
   2. Asian or Pacific Islander?
   3. Black (African American)?
   4. Hispanic?
   5. Non-Minority Woman?
   6. Woman?
2. Are the owner(s) of Bidder United States citizens?
3. Has Bidder ever been certified as an MBE by any agency? If so, please provide a copy of the certification.
4. Please provide the name(s) and phone numbers of any dedicated Bidder personnel who deal with MBE issues.
5. Please discuss Bidder’s own MBE program, and if Bidder is not an MBE itself, describe Bidder’s ability to provide any “second-tier” reporting to Columbia. Second-tier reporting provides details of Bidder’s expenditures, by ownership category, with MBE’s related to any contract.
6. Zip codes that govern the use of MWL suppliers are:
   1. 10025 - 10027
   2. 10029 - 10040
   3. 10451
   4. 10454 – 10455
   5. 10474
7. As Columbia is committed to the hiring of qualified local residents from the above mentioned local areas when possible:
   1. Does your proposal address the hiring of local residents?
   2. Has your company engaged local talent in any previous engagements (through any contract whether or not with Columbia)? If so, please describe.

# BID PART III: SCOPE OF WORK (“SOW”)

**Population-based HIV Impact Assessments (PHIA) Project Products and Data Visualization**

**Background**:

The purpose of the Population-Based HIV Impact Assessment (PHIA) Project is to assess the current status of the HIV epidemic in selected countries through nationally representative, population-based household surveys. These surveys include a household interview, an individual participant interview, home-based HIV testing with immediate sharing of results with participants, as well as other home-based testing and satellite or central laboratory specialty testing that define the impact of HIV prevention, testing and treatment programs. The responses to the tablet-based interview questionnaire also describe the reach of HIV prevention, care and treatment interventions in order to inform programs and policies.

This PEPFAR-funded project will conduct at least 6 surveys during the five-year project period (December 31, 2018 -September 29, 2025) in countries most affected by the HIV epidemic that have a strong PEPFAR presence, in close collaboration with the United States Centers for Disease Control and Prevention (CDC), international partners and in-country stakeholders, including each country’s Ministry of Health (MOH). From 2014-2018, 13 PHIA surveys were conducted across sub-Saharan Africa with many of the results demonstrating national-level progress made towards HIV epidemic control.

**Purpose of the Assignment:**

We are looking for a communications agency with experience in web and product design to design and layout PHIA products (phia.icap.columbia.edu) and re-design and maintain the PHIA project's interactive data visualization site (phia-data.icap.columbia.edu).

For products, this includes development of a standard template for a summary sheets and final reports and layout of documents with standard figures and graphs. For data visualization, a visual redesign, regular maintenance and updating of the platform is needed in consultation with the PHIA data team.

Each product will involve designing a cover page, basic proofreading of text, formatting text and tables, designing graphs and maps, and formatting the annex pages. Formatting services will also be required for documentation and manuals related to datasets. Approximately 4-6 rounds of review will be required for finalization of the reports assuming good accuracy and fidelity to templates and style guides on the first draft. Printing of the summary sheets and final reports will be required.

The data site requires regular updating to incorporate new data in line with the release of final reports. The data site should be user-friendly, interactive and allow researchers, policymakers, program implementation staff working on HIV to access national and subnational level summary PHIA data. The public dataset, log-in, registration and help pages should also be maintained in coordination with the PHIA data team. Future improvements to the data visualization should be anticipated after the initial re-design.

**Key Deliverables:**

**PHIA 1 (2014-2018 surveys)**

- 1 PHIA summary sheets including:

- Designed cover page with approx. 4-6 pages of text including 1-3 tables and 4-5 maps/graphs

- 200 printed copies, 8.5x11, in color

- 4-6 rounds of revision

- Proofreading for grammar, typos, syntax

- 4 PHIA final reports (1 report of ~250 pages, 3 reports of ~150 pages):

-Designed cover page with 50-60 or 70-90 pages of text, 20 figures, 60 tables, 100-150 appendix pages (light formatting) for 150 page report

- 200 printed copies, 8.5x11, perfect bound, in color

- 4-6 rounds of revision

- Proofreading for grammar, typos, syntax

**PHIA 2 (2019-2025 surveys)**

*Products:*

- Development of report template design for summary sheets and final reports in InDesign

- Conversion of report template design for summary sheets and final reports into Word format

- Cover page templates for reports in InDesign and Word

- 7 PHIA summary sheets including:

- Designed cover page with approx. 4-6 pages of text including 1-2 tables and 4-5 maps/graphs

- Word template of summary sheet

- 3 medium-complexity infographics

- Proofreading for grammar, typos, syntax

- 4-6 rounds of revision

- 200 printed copies, 8.5x11, in color

- 7 PHIA final reports including:

-Designed cover page with 40 pages of text up front, followed by 50 pages mostly tables and 6-8 annexes

- Word template of final report

- 4-6 rounds of revision

- Proofreading for grammar, typos, syntax

- 200 printed copies pages, 8.5x11, perfect bound, in color

- Formatting and creation of PDF documents of 2 survey questionnaires (approx. 50 pages), 1-2 data manuals (60 pages) and 2-3 codebooks (50-100 pages).

- Price per item cost of additional design, proofread, and printing of summary sheets, final reports, as needed

- Price per item cost formatting and creation of survey questionnaires/data manuals/codebooks as needed

- Price per item cost for proofreading for grammar, typos, syntax for all summary sheets, final reports

*Data visualization site:*

- Redesign and regular maintenance of entire PHIA data site (phia-data.icap.columbia.edu)

- Host, redesign and maintain backend data base for the web-based data explorer tool

- Rebuild the web-based data explorer tool

- Provide quality control of the displayed data values on web-based data explorer tool

- Host, redesign and maintain client level data upload/download site with registration/access permission controls

- Build backend database to manage and track users and administrators

- Hourly maintenance cost of entire PHIA data site

Note: Please provide an itemized, total cost of all products mentioned above as well a total amount

**Deliverables (in detail):**

**PHIA 1 (2014-2018 surveys)**

-PHIA summary sheets for design and layout, proofreading, and printing:

- Haiti (HAPHIA)

- PHIA final reports for design and layout, proofreading, and printing:

- Cote D’Ivoire (CIPHIA)

- Rwanda (RPHIA)

- Kenya (KENPHIA)

- Haiti (HAPHIA)

- PHIA data public release products to be posted on data visualization site:

- Haiti (HAPHIA)

**PHIA 2 (2019-2025 surveys)**

*Products:*

- Development of report template design for summary sheets and final reports in InDesign

- Conversion of report template design for summary sheets and final reports into Word format

- Cover page templates for reports in InDesign and Word

- PHIA summary sheets for design and layout, proofreading, and printing:

- Zimbabwe (ZIMPHIA 2020)

- Lesotho (LePHIA 2020)

- Malawi (MPHIA 2020)

- Uganda (UPHIA 2020)

- Eswatini (SHIMS3 2020)

- Mozambique (INSIDA 2020)

- Others, as needed (provide price per item cost)

- PHIA final reports for design and layout, proofreading, and printing:

- Zimbabwe (ZIMPHIA 2020)

- Lesotho (LePHIA 2020)

- Malawi (MPHIA 2020)

- Uganda (UPHIA 2020)

- Eswatini (SHIMS3 2020)

- Mozambique (INSIDA 2020)

- Others, as needed (provide price per item cost)

- PHIA data public release products to be posted on data visualization site:

Zimbabwe (ZIMPHIA 2020)

- Lesotho (LePHIA 2020)

- Malawi (MPHIA 2020)

- Uganda (UPHIA 2020)

- Eswatini (SHIMS3 2020)

- Mozambique (INSIDA 2020)

- Others, as needed

- Formatting and creation of PDF documents of 2 survey questionnaires (approx 50 pages), 2 data manuals (60 pages) and 3 codebooks (50-100 pages)

*Data visualization site:*

- Redesign and maintain PHIA data visualization site/pages

- Redesign and maintain PHIA public dataset pages

- Redesign and maintain PHIA data log-in, registration, help pages

- Provide regular reports on what data is being accessed/for what purposes

**Consultant Qualifications and Requirements**

*Management:*

* Dedicated production team for products and data visualization
* Ability to respond and deliver materials quickly, sometimes with short turnaround and review periods

*Products:*

* InDesign software and other design software
* Microsoft Office software
* Designated production team and project manager
* Proofreader (English (required), French (preferred), Portuguese (preferred))
* Printing services, including delivery of products

*Data visualization:*

* Knowledge of data visualization and design software (e.g. Tableau, Laravel or other data-related APIs)
* Staff with experience in website design and maintenance, data visualization
* Google analytics knowledge

# BID PART IV: PROPOSED TIMELINE

The Bidder agrees to adhere to the project timeline and deliverables as indicated/provided by ICAP throughout the duration of the project cycle.

# BID PART V: BIDDER BACKGROUND AND CAPACITY

The Bidder should have an extensive background in strategic communications, graphic design, and web design and data visualization. Experience working with non-profit or academic organizations in a global context would be preferred.

The Bidder should have staff with extensive experience in layout and design of long-form reports, proofreading of academic reports, data visualization and web design, large datasets for public data visualization use within an open source community, attention to detail, and managing large projects.

# BID PART VI: FINANCIAL PROPOSAL

Financial proposal must specify cost, fees, and payment terms for fulfilment of the above requirements. Please use the table below as guidance to provide costings for requested deliverables. Should you have a need to include narrative, please do so in no more than 4-5 sentences below each table.

Please provide a narrative and rate card for additional deliverables including hourly rate and price per item cost.

| **Deliverable/Activity** | **Price per unit** | **Unit** | **Total Cost** |
| --- | --- | --- | --- |
| PHIA 1 Products | | | |
| Summary sheets   * Layout and design * Proofreading * Printing |  | 1 |  |
| Final reports   * Layout and design * Proofreading * Printing |  | 4 |  |
| **Total Cost PHIA 1** | | | |
|  | | | |
| **Deliverable/Activity** | **Price per unit** | **Unit** | **Total Cost** |
| PHIA 2 Products | | | |
| Report template for summary sheet and final report in InDesign |  | 2 |  |
| Report template design into Word format |  | 2 |  |
| Cover-page templates for reports in InDesign and Word |  | 3 |  |
| Summary sheets   * Layout and design * Proofreading * Printing |  | 6 |  |
| Final reports   * Layout and design * Proofreading * Printing |  | 6 |  |
| Reformatting of Survey Questionnaires |  | 2 |  |
| Layout and Reformatting of Data Manuals |  | 2 |  |
| Reformatting of Codebooks |  | 3 |  |
| Data Visualization | | | |
| Redesign of the PHIA data visualization site |  |  |  |
| Development and configuration of data visualization site |  |  |  |
| Project management costs |  |  |  |
| Site maintenance cost (per hour) |  |  |  |
| **Total Cost PHIA 2** |  |  |  |

|  |  |
| --- | --- |
| **Rate card** | **Cost** |
| Summary sheet layout and design (1) |  |
| Final report layout and design (1) |  |
| Infographic design |  |
| Concept design (per hour) |  |
| Layout and design (per hour) |  |
| Reformatting (per hour) |  |
| Proofreading (per hour) |  |
| Data visualization site maintenance (per hour) |  |
| Design work (per hour) |  |

# BID PART VII: CONTRACT ACKNOWLEDGEMENT

**DATE:** *Date signed*

**FROM:** *Vendor Name*

*Address*

**TO:** ICAP at Columbia University in the City of New York

**RE: PROPOSAL/BID DESCRIPTION**

**FOR: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

*Quotation #*

Please be advised that we have carefully read the Appendix “A”, Columbia’s Standard Service Agreement, enclosed in the package. We acknowledge that if we are ultimately awarded the contract we will promptly execute an agreement containing identical terms and conditions. We understand that there will be no negotiation of the terms and conditions of the Agreement upon award.

***(Please note any contract exceptions in the space below or provide an attachment with appropriate signature. Type NONE if you do not have any exceptions.)***

***Note Exceptions:***

Signature:

Name:

& Title:

# APPENDICES

**Appendix A: Columbia University IT Service Provider Agreement (see separate attachment)**

## 