



Request for Information

RFI-674-16-000100

PERFORMANCE: Practical Education Research For Optimal Reading and Management: Analyze, Collaborate, Evaluate

Issuance Date: April 14, 2016

Closing Date and Time: Thursday April 28, 2016 at 2:00pm (14:00) South Africa time

Subject: Request for Information (RFI) on the **PERFORMANCE: Practical Education Research For Optimal Reading and Management: Analyze, Collaborate, Evaluate Project**

Please e-mail responses to EducationSA@usaid.gov. Please reference the e-mail with the subject title "Response to PERFORMCE RFI-674-16-000100".

The purpose of this RFI is to solicit feedback on the PERFORMANCE project proposed in the draft Statement of Work below and invite interested organizations to attend an Industry Day. The objective of PERFORMANCE is to evaluate all activities implemented under a set of USAID education awards; conduct a meta-analysis of these findings and set up a professional learning community of education researchers focusing on language and literacy in the early grades. USAID/South Africa (SA) may use feedback and comments from this RFI to refine the approach and focus areas for a future Requests For Proposals. If a Request For Proposals is issued, USAID/SA intends to make one award with an estimated duration of five years in length. It is anticipated the type of award will be a contract.

INSTRUCTIONS

Responses (comments, questions, suggestions, and enhancements) to this RFI are due to the email address below by Thursday April 28, 2016 at 2:00pm (14:00) South Africa time. Please note requests to attend the Industry Day must be submitted by that deadline as well. Responders may provide responses through email or through attachments to email in Microsoft Word compatible format or Adobe Acrobat formats.

In order to maximize potential impact, USAID is seeking feedback on the project approach and seeks additional information on programs, policies, research, data and activities that might be useful for the project design.

Industry Day

USAID/SA intends to host an Industry Day for the forthcoming solicitation for this project on 3 May 2016. This event is FREE and OPEN to the PUBLIC: however, registration is required. Organizations are asked to register by submitting your company name, company address, names of attendees (not more than 2 per organization), and a brief synopsis of the company's services and experience by e-mail to EducationSA@usaid.gov no later than Thursday April 28, 2016 at 2:00pm (14:00) South Africa time. Please note space is limited so early registration is recommended. Attendees will be notified by email of the location and agenda.

The purpose of this Industry Day is for USAID to inform organizations about the plans for the new Basic Education Monitoring and Evaluation contract and to gain industry insight regarding best practices and standards to assist with the development of our requirements. Cognizant USAID personnel from the Mission's Education Team and Acquisition and Assistance Office will be present to brief vendors. Additionally, time will be set aside to give interested businesses the opportunity to meet and network.

Please e-mail responses to EducationSA@usaid.gov. Please reference the e-mail with the subject title “Response to PERFORMANCE RFI-674-16-000100”.

DISCLAIMER

This is a Request for Information (RFI) only. It is not a Request for Proposal/ Application/ Quotation, an Invitation for Bids or a Solicitation. This RFI is an opportunity for USAID/South Africa to obtain information from interested parties regarding the Program Description below. Responses to this notice are not offers and cannot be accepted by the U.S. Government to form a binding contract or agreement. Responses to this RFI are strictly voluntary and USAID will not pay respondents for information provided in response to this RFI. Responses to this RFI will not be returned and respondents will not be notified of the result of the review. If a Request for Proposals (RFP) is issued, it will be announced on www.FBO.Gov at a later date, and all interested parties must respond to that RFP/Solicitation announcement separately from any response to this announcement. This RFI does not restrict the Government's acquisition approach on a future Solicitation.

DRAFT DESCRIPTION/SPECIFICATIONS/STATEMENT OF WORK

TITLE: PERFORMANCE: Practical Education Research For Optimal Reading and Management: Analyze, Collaborate, Evaluate

PURPOSE AND SCOPE

Under the PERFORMANCE contract a consortium of area specialists will evaluate all activities implemented under PERFORM awards, it will conduct a meta-analysis of these findings, and it will set up a professional learning community of education researchers focusing on language and literacy in the early grades.

The goal of this contract is to generate an evidence base that demonstrates what interventions are most effective in improving the quality of language and literacy skills of primary grade learners in South Africa. These findings will be used to design and refine USAID funded education programming. Through this contract USAID also aims to inform the South African Department of Basic Education's primary grade language and literacy policy and implementation, as well as the work of other donors, funders, and organizations working on primary grade reading issues.

Projects under PERFORM will support reading outcomes in home language and first additional language, and may include work with District officials, school principals and school teachers. Interventions will deliver training on management skills, facilitation skills, content knowledge and pedagogy, as well as implementing learning and teaching support material. Training and support will take on various forms, including block training, school-based training and support, and virtual support. The evaluation consortium will contribute to the diagnostic, planning and design phases of these projects to ensure that implementation allows for sound evaluation methods.

PERFORM will likely be implemented at scale in one or two provinces, which will be decided in collaboration with the Department of Basic Education (DBE). Interventions under PERFORM will run for 3-4 years, with the PERFORMANCE contract extending about a year beyond that to allow for the collection and analysis of longitudinal data.

BACKGROUND

Despite the government of South Africa's (GoSA) large investment in basic education – ZAR228.8 billion (approximately \$15.25 billion) in 2016/17 – roughly 16% of the national budget – South Africa continues to face challenges providing a quality education in the majority of the country's schools and its education indicators continue to lag behind that of its peers. In international comparative reading tests, South Africa still performs below most other African countries and has nearly the highest number of functionally illiterate learners (Van der Berg et al, 2011). The GoSA considers education to be one of its highest domestic priorities and one of the greatest long-term challenges facing the country, as is evident in the National Development Plan of which the number 1 Outcome is improving the quality of Basic Education (DBE, 2013).

To support the GoSA in this endeavor, USAID/South Africa is implementing the Practical Education Research for Optimal Reading and Management (PERFORM) Project. The overall goal of PERFORM is to improve reading skills of primary grade learners. This will advance a top priority of South Africa's National Development Plan, "Improving Education, Training and Innovation," as well as the continuation of Goal 1 of USAID's Global Education Strategy into 2016 and beyond, which aims for 100 million children with improved reading skills.

PERFORM will contribute to these goals through implementing education interventions in support of three objectives:

- improved primary grade reading instruction;
- increased quality of educational administration and support;
- Government of South Africa support for reading initiatives built at district, provincial and/or national level.

Interventions will be designed and implemented in partnership with GoSA to focus on building teacher knowledge and skills that can improve literacy pedagogy, strengthening and improving education management for better reading outcomes, as well as involving community members in supporting reading outcomes.

PERFORM will use a demonstration effect and rigorous evaluation to support GoSA in bringing proven education solutions to scale, thus increasing the impact and value of national investments in the education sector. This will be done by piloting and testing local solutions which show promise to improve the reading skills of primary grade learners. Close collaboration with GoSA will aim to generate buy-in for new reading interventions and to ensure GoSA has the data necessary to decide how best to take successful, cost-effective literacy improvement interventions to scale across the country.

In order to deliver rigorous evaluations under PERFORM, the Analyze, Collaborate, Evaluate ("PERFORMANCE") Indefinite Delivery, Indefinite Quantity (IDIQ) contract will engage a local organization, or consortium of organizations, to provide technical, analytic, advisory, monitoring, evaluation and related support services to assist USAID/South Africa in effectively diagnosing, planning, designing, monitoring, evaluating and learning from interventions, and relaying information to GoSA, the education research community and other education sector stakeholders. This dedicated IDIQ will allow cohesion across all evaluations of PERFORM activities, as well as a meta-analysis of outcomes across the project. It will also allow for the flexibility to adapt to changes in PERFORM activities and to address additional reading related research and analysis requests from USAID that develop during the course of PERFORM's implementation, both in response to the needs of the Department of Basic Education (DBE) and otherwise.

OBJECTIVES OF "PERFORMANCE"

OBJECTIVE 1

Design and implement both quantitative and qualitative evaluations, surveys, studies, and assessments, including both impact and performance evaluations for PERFORM and other reading-related education projects as specified by USAID/South Africa. Provide technical advice in the design, planning, and implementation phases of PERFORM interventions to allow for high quality evaluations, and to maximize opportunities to gather comparable data

across the USAID/SA education portfolio. This data will allow USAID to constantly reflect on and improve its primary grade reading interventions.

To this end evaluation work under this IDIQ must be done in compliance with the current (or subsequent) USAID Evaluation Policy (<http://www.usaid.gov/evaluation/policy>).

Objective 1 Result:

A high quality quantitative and/or qualitative evaluation, survey, study or assessment delivered for every task order issued. This will include a collaboratively developed improvement plan based on the evidence gathered.

OBJECTIVE 2

Analyze trends revealed by a meta-analysis of USAID education sector evaluations, especially those performed under this contract, and in other credible current research into literacy and language pertinent to the South African context, to inform education policy and future education programming in South Africa.

Objective 2 Result:

Comprehensive, fact-based reports, analyzing USAID education evaluations and current education research focused on recommendations for viable programming in the education sector.

OBJECTIVE 3

Create demand and support for a strong community of practice around research into literacies and languages in education, to ensure credible, rigorous, independent, data-driven analyses that can inform policy. To this end the contractor must make use of existing networks including both public and private research entities and must include a cooperative and mutually beneficial working relationship with the South African Department of Basic Education (DBE).

Objective 3 Result:

A virtual clearing house with the capacity to deliver, analyze, evaluate and disseminate high quality education sector focused research, monitoring, evaluation and learning in the area of literacy and language, to the standards of the most rigorous of international best practices in social science research for public and private sector clients.

STATEMENT OF WORK

OBJECTIVE 1: DESIGN AND CONDUCT EVALUATIONS, SURVEYS, STUDIES AND SECTOR ASSESSMENTS

A. PERFORMANCE AND IMPACT EVALUATIONS

In response to task orders the Contractor will be expected to design and conduct a wide array of performance and impact evaluations in the education sector, in conjunction with PERFORM activities. The Contractor will also be required to suggest key evaluation questions during each activity design, in consultation with USAID.

For each evaluation, the contractor must prepare a work plan, methodology and study protocol that meet or exceed the USAID requirements for rigorous evaluations, as defined by the USAID Evaluation Policy (download a copy from <https://www.usaid.gov/evaluation/policy>). The protocol must include evaluation questions that will address the most important and relevant questions about project/activity performance, as well as questions linked to specific future decisions to be made by USAID or partner government institutions regarding the development hypothesis underlying PERFORM. Each evaluation protocol should further include plans for a cost-benefit analysis and/ or cost-effectiveness analysis as required.

B. SURVEYS, STUDIES, AND SECTOR ASSESSMENTS

In response to task orders the Contractor will be expected to design and conduct a wide array of surveys, studies, and education sector assessments to identify opportunities for PERFORM interventions to further PERFORM's objectives. For example, the Contractor could conduct a gender analysis to assess gaps between gender reading outcomes, and to recommend strategies to achieve gender equality. The Contractor could also conduct assessments to analyze issues affecting teachers; language of instruction; marginalized groups; persons with disabilities; and minority groups as far as they impact on reading results. For each survey, study, or sector assessment the contractor must provide a study protocol for approval that reflects the most current and widely accepted practices for conducting the particular product desired.

OBJECTIVE 2: RECOMMENDATIONS FOR VIABLE FUTURE EDUCATION SECTOR ACTIVITIES

A single-holder for this contract is sought to maintain quality control of all USAID/SA education evaluations so that results from all the evaluations are comparable in the aggregate. A meta-analysis of all evaluations performed under this contract in conjunction with meta-analyses of other education sector evaluations and research must be conducted to inform pertinent and viable future education programming for both USAID and other interested education stakeholders. The contractor may also be asked to identify and reference models and best practices from other countries that have been successful in overcoming identified challenges to primary grade literacy, root causes for low results. The contractor may also be asked to conduct comparative analyses between regions and with practices in other countries.

OBJECTIVE 3: STRENGTHEN THE COMMUNITY OF PRACTICE SURROUNDING EDUCATION RESEARCH, MONITORING, EVALUATION, AND LEARNING FOR LITERACY AND LANGUAGE

As an integral aspect of PERFORMANCE the contractor must seek to strengthen the networks involved in educational research in South Africa as it relates to languages and reading. In coordination with USAID, the South African Department of Basic Education, South African and international universities and research organizations, and non-governmental organizations, the contractor must work towards creating a demand for high quality education research on literacy and language, and ensure the existence of an entity, partnership, or network able to produce such education sector focused research to the standards of the most rigorous of international best practices in social science research for public and private sector clients. This must be achieved through creating a virtual research

community focused on language and literacy that can produce its own research as well as evaluate the quality of research from other sources. It should publish its findings on a virtual platform and foster an influential relationship with policy makers in government, as well as other relevant education sector stakeholders.

OBJECTIVE 4: MANAGEMENT AND ADMINISTRATIVE SERVICES

The Contractor must provide all general management and administrative support necessary to perform the Contract and achieve the above results. This includes, but is not limited to, the following:

1. The Contractor will provide overall management and administration of the Contract, including home office support and administrative services. The Contractor will provide both the key personnel specified in the Contract and additional personnel, long-term and short-term, necessary to meet recurring general management and administrative support needs under the Contract.
2. The Contractor will procure or lease facilities, supplies and services as necessary to perform the Contract.
3. The Contractor will provide the planning necessary for performance of the contract.
4. The Contractor will get the necessary ethical clearance and permission from authorities to conduct research in government sites, particularly where students will be involved.
5. The Contractor will provide oversight, quality control and general technical support of all services and deliverables provided pursuant to the Contract. This includes the provision of copywriters/editors that are familiar with US American English and US American report writing and reporting standards.
6. The Contractor will provide and assure the proper, efficient and uniform use of modern management and accounting practices, information technology (IT), communications, reporting, human resource management, property control, security, records and other administrative processes and systems required under the Contract.
7. The Contractor will manage the overall reporting needs of the program as specified in the Contract and developed in work plans in conjunction with the Contracting Officer's Representative (COR).

STANDARDS OF PERFORMANCE

This section defines the performance requirements to which the Contractor shall be held; establishes the performance levels or standards; and defines how these performance standards will be measured.

Measurable performance standards will be established for individual task orders. These performance standards will be consistent with the objectives of "PERFORMANCE", including the following general performance standards:

Technical competence: Performance may be measured by the Contractor's effectiveness on the assignment. Effective technical assistance will produce reports that contain actionable recommendations that can be successfully implemented by the client, the USAID/South Africa Education Team. Ineffective technical assistance is marked by superficial, unsubstantiated or theoretical findings and recommendations, which are irrelevant or cannot be implemented.

Ability to assemble or prepare effective expertise through subcontracts: Performance may be measured in several different ways. For example, superior contractor recruitment ability goes beyond a simple review of candidates' resumes before submission to USAID. Some candidates might appear qualified on paper, but may lack effectiveness in action. Superior recruitment processes shall be based on references and first-hand contacts with the technical expert proposed. Similarly, in team building, superior contractor performance will be demonstrated by assembling teams that function smoothly in accomplishing the required task. Superior contractor performance shall take into consideration how each individual will contribute to create positive group chemistry when assembling teams. Inferior performance is marked by disruptive team relations, notwithstanding the sometimes stellar reputation of individual members on the team.

Contractor responsiveness: Performance may be measured by the Contractor's ability to maintain open, direct, and responsive communication channels with the USAID/South Africa Education Team. Superior contractor performance is marked by a rapid, helpful response to the client without undue delays.

Client satisfaction with the finished product: Performance may be measured in many ways. Superior contractor performance is distinguished by the quality of the final deliverable. High quality deliverables should be clear, concise, accurate, well structured, and easily comprehended. Clear and concise causal relationships between evaluation questions, evidence, and conclusions should be readily apparent and easily read. Evaluation jargon must be explained in layman's terms so that the report is accessible to a wide audience. Client satisfaction may be measured by the amount of input needed from and revision demanded by the client.

Proficiency of the client: Performance may be measured based on the increased ability of the client to understand and act on the technical subject matter subsequent to Contractor's provision of services.

Adherence to the proposed subcontracting plan: This relates to the Contractor's ability to assemble or prepare effective expertise (noted above). USAID expects to be able to benefit from access to the full range of experience and expertise. The Contractor's adherence to the proposed sub-contracting plan constitutes part of the basis for the evaluation of contractor performance.

References

Department of Basic Education. 2013. *Action Plan 2019: Towards the realization of Schooling 2030*. Pretoria.

Van der Berg, S.; Taylor, S., Gustaffson, M.; Spaul, N. and Armstrong, P. (n.d). *Improving education quality in South Africa* (p. 1-26). 2011. National Planning Commission, Pretoria.

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