INVITATION TO BID

Bid for Global Solutions Database

#123

Room to Read

465 California Street 1000
San Francisco, CA 94104

INVITATION TO BID

Room to Read is soliciting competitive bids (each, a "Bid") for the goods and services described below ("Goods" and "Services"). The terms and conditions applicable to the Bids are set forth in: (i) this Invitation for Bid (this "Invitation"), (ii) the Instructions to Bidders (the "Instructions"), (iii) the Bid Form attached as Exhibit A (the "Bid Form"), (iv) the Terms of Reference (TOR) attached as Exhibit B, and (v) any additional attachments or enclosures. The documents set forth in items (i)-(v) above are referred to collectively as the "Bid Documents." All parties submitting Bids (each, a "Bidder") are expected to read the Bid Documents carefully.

General Bid Information	
Bid Number	#123
Bid Issued	**May 20, 2025**
Due Date	**June 10, 2025**

Description of Software	
Item No.	**Description of Software**
1	Monitoring and Evaluation software for global development projects, featuring effective tools for performing complex aggregation and disaggregation of indicator data, donor allocation and reporting, and project management.
2	
3	

Description of Services	
Item No.	**Description of Services**
1	Discovery and Planning
2	Stakeholder Engagement and Change Management
3	Platform Customization
4	Data Migration and Data Archiving
5	User Testing

INVITATION TO BID

Description of Services	
Item No.	**Description of Services**
6	Documentation, Training and Deployment

Address for Submission	
Location	**Address**
SUBMISSION EMAIL	**GlobalSolutionsDatabase@roomtoread.org**

Requests for Information ("RFI")	
Primary Room to Read Contact	**GlobalSolutionsDatabase@roomtoread.org**
RFI Due Date (if not before)	**June 3, 2025**
Response Date	**June 6, 2025**

INSTRUCTIONS TO BIDDERS

1 INFORMATION PROVIDED TO BIDDERS

1.1 Changes and Updates to Bid Documents: Room to Read may change or update the Bid Documents by delivering a written notice to all active Bidders. Such notice shall become part of the Bid Documents. Room to Read will not deliver any such notices within five (5) days of the Due Date.

1.2 Requests for Information: Bidders must submit questions or RFI by email to the address specified on the Instructions at least one week before the submission Due Date.

1.3 Interpretation of Terms: No oral interpretation provided by Room to Read to any Bidder as to the meaning or consequence of any portion of the Bid or the Bid Documents shall be considered binding on Room to Read. In case of dispute over the meaning of terms and conditions contained in the Bid Documents, Room to Read's interpretation shall govern.

2 BID PREPARATION

2.1 Bid Forms and Complete Bid Submission: Bids must be made on the Bid Form attached as <u>Exhibit A</u>. Bidders must fully complete the Bid Form in English unless otherwise specified by Room to Read on the Bid Form. Numbers should be stated in both words and numbers. In case of conflict between words and numerals, the words shall govern. In case of arithmetic error, the correct sum based on the unit price shall prevail. A Complete Bid Submission must contain a completed Bid form, including the Bidder Acknowledgements and Agreements, Technical Proposal Form, and the Bid Price Form.

2.2 Discounts: Bidders may offer discounts related to purchase volume or product mix, or for any other reason. Bidders shall clearly describe any such discount on the Bid Form, so that Room to Read can calculate the net cost of the Bid. Room to Read shall only consider offers specified on the Bid Form in the evaluation of Bids.

2.3 Price: The price stated on the Bid Form is the firm price. The stated price shall be Bidder's entire compensation for the Goods and/or Services and shall include all applicable taxes, duties, materials, shipping and other costs. Room to Read shall not accept responses labeled "negotiable", "will negotiate" or similar. Increases in taxes, duties, or materials or costs, if any, shall not affect the Bid price. Any assumptions made in calculating the price or major exclusions from scope must be clearly set out on the Bid Form.

2.4 Bidder Costs: Each Bidder shall be responsible for all its costs associated with the preparation and submission of its Bid, regardless of the outcome of the bidding process.

3 BID SUBMISSION

3.1 Completion and Finality: Room to Read shall reject any Bid which is not a Complete Bid Submission, not properly signed, or not otherwise made accordance with the Bid Documents. Bidders may not change the terms of a Bid after submission, for any reason. Room to Read shall not be responsible for any errors or omissions in a submitted Bid.

3.2 Deadline for Receipt of Bids: Bidders shall send their Bids by email by the Due Date to GlobalSolutionsDatabase@roomtoread.org. Room to Read may, in its sole discretion, extend the deadline for submission by providing written notice to all active Bidders, in which case all terms and conditions of the Bid Documents shall remain in effect under the new deadline.

3.3 Withdrawal and Duration of Bid: Bidders may withdraw any Bid prior to the Due Date. Bids submitted by the Due Date shall remain valid and may not be withdrawn for forty-five (45) days after the Due Date. Room to Read may request, in writing, that the Bidders consent to an extension of this forty-five (45) day period.

4 BID REVIEW

4.1 Negotiation of Bid Terms: Room to Read shall be entitled to undertake negotiations with any Bidder before the Due Date.

4.2 Joint Ventures and Multiple Bids: Bids from joint venturers are not acceptable and will not be considered. Bidders may submit only one Bid for each Invitation. No Bidder, or any of its affiliates, shall be allowed to submit more than one Bid unless Room to Read specifically calls for alternate Bids.

4.3 Bidder Qualifications: Room to Read shall have sole discretion to determine whether Bidders are qualified to provide the Goods and/or Services. Room to Read may conduct due diligence as it deems appropriate to assist in its evaluation of any Bid and to establish the historical practices, qualifications, and financial condition of Bidders, including inspection of Bidders' facilities Upon Room to Read's request, at any time, Bidder shall promptly submit to Room to Read satisfactory evidence of Bidder's financial resources, past experience with providing the Goods and/or Services, compliance with Room to Read's Compliance Policies (See: **[Compliance Policies - Room to Read](#)**)*,* client references, ability to perform the obligations set forth in the TOR, applicable licenses and permits, insurance, responses to any additional questions that Room to Read may ask, and any other evidence of Bidder's ability to provide the Goods and/or Services, including on-going support.

4.4 Samples: If Room to Read requests, Bidders will provide Room to Read with samples of applicable Goods, at no cost to Room to Read.

4.5 Bid Price Review: If Room to Read questions a Bid price in view of Room to Read's estimations of cost, Room to Read may require Bidder to provide information regarding the basis of the Bid price.

5 BID SELECTION AND EXECUTION OF PURCHASE AGREEMENT

5.1 Bid Selection and Rejection: Room to Read reserves the right, in its sole discretion, to waive any non-substantial or immaterial irregularities in any Bid and the right to accept or reject any and all Bids, or to accept or reject any portion or combination of any Bid. Room to Read shall not incur any liability to any

INSTRUCTIONS TO BIDDERS

Bidder or other third party in connection with the rejection of any Bid, the rejection of any portion or combination of Bids, or the discontinuation of the bidding process with respect to the Goods and/or Services.

5.2   Notification of Successful Bidder: Prior to the expiration of the Bid, Room to Read shall notify any successful Bidder that its Bid has been accepted by [registered] letter, or email (a "Notice of Award").

5.3   Execution of Purchase Agreement: A successful Bidder agrees that the Terms of Reference shall be incorporated without changes into a Purchase Agreement (or such other title as may be given the parties' mutual agreement on all terms and conditions) between it and Room to Read. The successful Bidder signing the Purchase Agreement shall be the same individual or entity that signed the Bid Form. An affiliate, successor, assignee, or other transferee may not enter into the Purchase Agreement in place of the Bidder without Room to Read's prior written consent. In the event a successful Bidder and Room to Read, after good faith negotiations, do not execute the Purchase Agreement within fifteen (15) business days from the date of receiving the Notice of Award, Room to Read, in its sole discretion, may extend the time for negotiations to a specified date, or cancel that successful Bidder's Bid and award the work to the another Bidder, or reject all Bids and either call for new Bids or discontinue the bidding process with respect to the Goods and/or Services, without incurring any liability to the initially-successful bidder, any rejected Bidder or other third party.

6   BIDDER STANDARDS OF CONDUCT

6.1   Ethics: Bidders shall adhere to the highest standards of ethics and integrity in the bidding process, having due regard for the nature and purpose of Room to Read as an international organization, and ensure that employees assigned to perform any obligations under the Bid Documents conduct themselves in a manner consistent with such standards**.**

6.2   No Gifts or Benefits; Conflicts of Interest: Bidder represents and warrants that it has not offered or paid any direct or indirect gifts, favors, or benefits arising in connection with the bidding process to any employee or representative of Room to Read and their relatives or any of Room to Read's affiliates.

6.3   Non-Collusion; Confidentiality: Bidder represents and warrants that it has not in any manner, directly or indirectly seek to fix any overhead, profit, or cost element of the Bid price, or of that of any other

Bidder. Bidder must treat any information of a confidential nature received in relation to the Bid from Room to Read as strictly confidential and disclose it only (i) to representatives who have agreed in writing to comply with this confidentiality requirement or (ii) if required by a legal obligation (in which case Bidder will notify Room to Read as soon as practicable).

6.4   Compliance With Law: Bidder represents and warrants that it is, and shall continue to be, in compliance with all applicable laws, ordinances, rules, regulations, and lawful orders of public authorities of the United States and the State of California, and any jurisdiction in which Bidder does business, including without limitation those jurisdictions' any anti-bribery and anti-fraud statutes.

6.5   Violation of Standards of Conduct: Bidder agrees that a violation of this Section 6 constitutes grounds for rejection of the Bid or termination of any Purchase Agreement executed with a successful Bidder, in accordance with Termination Section of the Purchase Agreement.

7   OTHER TERMS

7.1   Bidder's Relationship: Bidder and Room to Read are and shall remain independent contracting parties. Bidder may not represent that it is an agent, fiduciary, employee, partner, or similar relation of Room to Read for any purpose. Bidder may not use Room to Read's name or logo in any manner without prior written permission.

7.2   Governing Law: The Bid Documents and any dispute arising out of it will be governed by California law without regard to its conflict of laws principles, and the courts located in the County of San Francisco, California will have exclusive jurisdiction to resolve any disputes.

All capitalized terms used but not defined in this Bid Form shall have the meaning set forth in the Invitation.

Bidder Acknowledgments and Agreements

By signing below, Bidder acknowledges and agrees that Bidder has read and become familiar with the Bid Documents, has fully investigated and understands all terms and conditions related to the Bid, and

Bid Form

accepts and agrees to all terms and conditions contained in the attached Invitation and Instructions. This Bid Form is a binding offer ("Offer") to provide the Goods and/or Services in accordance with the terms and conditions of the Bid Documents. If successful, Bidder will be expected to negotiate in good faith a Purchase Agreement (as set forth in Section 5.3 of the Instructions to Bidders) and the terms and conditions of the executed Purchase Agreement shall control the provision of the Goods and/or Services.

Bidder Information and Signatures

Bidder's Full Name (Print or Type)	
Primary Contact (Print or Type)	**Name:** **Title:** **Telephone:** **Fax:** **Email:**
Business Address (Print or Type)	

Authorized Signature: _____

Title: _____ Date:_____

Printed Name: _____

NOTE: If the Bidder is a corporation or partnership, you must provide its full legal name, the name of the individual(s) authorized to sign the Purchase Agreement on its behalf and ensure that it is duly signed. Room to Read may request proof of the individual(s) authority to sign.

Technical Proposal Form

This Technical Proposal will demonstrate the Bidder's responsiveness to the Terms of Reference (TOR) outlined in Exhibit B. A successful Bidder will structure the Technical Proposal as outlined below (the main text should not exceed 15 pages in length).

(a) Monitoring and Evaluation Software

This Section will provide an overview of your solution that will help us assess its value in the marketplace per the TOR. Please feel free to provide links to publicly available information.

(b) Disaster Recovery/Business Continuity/Transition to Another Provider

This section will provide details about how the Bidder will ensure a copy of our data in the event of disaster or the necessity to transition to another provider. Please specify what format the data would be in and the approximate timeline for providing the data.

(c) Management Structure

This Section will provide a corporate orientation of the Bidder and include the following:

- The year and country of incorporation and a brief description of present activities related to the Proposal
- The person(s) who will represent the Bidder in any future correspondence with Room to Read
- A description of the organizational unit(s) that will become responsible for the contract, and the general management approach towards a project of this kind

(d) Institutional capacity

This Section will provide information about institutional capacity of the Bidder to carry out this work, including:

- Recent experiences on projects of a similar nature, including information that will facilitate the evaluation of the Bidder's reliability and capacity to meet the requirements (e.g. similar engagements undertaken, results achieved, outcomes obtained, success stories)
- Audited financial statements for the last 3 fiscal years
- Applicable business licenses, permits and registration
- Proof of insurance, as applicable
- List of business references, at least three, including name and contact information

(e) Legal Disputes or Lawsuits

This Section will provide a list of any disputes or lawsuits in which your company is involved that could have a material impact on the company's business operations.

(f) <u>Resource Plan</u>

This section will explain the Bidder's resources in terms of personnel necessary for the performance of the requirements. The Bidder will provide the composition of the team that will carry out the engagement, with experience details for key staff. The Bidder will also provide an explanation of the ongoing support structure that will be available post deployment of the site.

(g) <u>Proposed Approach, Methodology, Timing and Outputs</u>

Room to Read as the project lead, will oversee all phases of the project and ensure coordination and communication across departments. The selected vendor will work under the guidance of the Senior Director of International Program Operations based in the United States, and in partnership with the design team, a cross-departmental team of colleagues who will work directly with the vendor to customize the site, manage data migration, and facilitate training. Room to Read will finalize a project implementation plan with the vendor and establish regular check-ins to discuss progress. Correspondingly, Room to Read will look to the vendor to provide the tools and ongoing engagement structure required to setup the site according to our data specifications. We will also look to the vendor to lead on what needs to be decided and completed (to stay in accordance with our timelines) until we get to the point where our worldwide teams begin to use the platform for data-entry and reporting.

To this end, using the framework shared below, describe your proposed process to address each of the listed components with our team. Please indicate the role and support services that you would expect from Room to Read at each stage, and the estimated time required for each component.

Component	Description of Proposed Process	Support Services Expected from Room to Read	Estimated Time Required
Discovery and Planning			
Stakeholder Engagement and Change Management			
Platform customization			
Data Migration and Data Archiving			
User Testing			
Documentation, Training and Deployment			

Please also provide a "reasonably" detailed workplan in a Gantt chart format.

The Technical Proposal will not contain any pricing information on the services offered. Pricing information will be separated and only contained in the Bid Price Form below.

EXHIBIT A

Bid Price Form

A successful Bidder shall be required to furnish all material, equipment, supplies, applicable taxes and duties, insurance, bonding (if applicable), permits and licenses to provide the Goods and/or Services. The undersigned Bidder, having carefully examined all Bid Documents, proposes to provide the Goods and/or perform the Services, and to furnish any and all required labor, material, equipment, insurance, permit, bonding, transportation and services required for delivery of the Goods or performance of the Services in strict conformity with the Product Specifications below, by the date specified below for the lump sum price (including all taxes, duties, materials, and shipping costs) of:

Total Bid Price
Total Bid Price of: $_____(Numeric amount)   _____(Written amount)

Discounts

Bid Information: Software						
Item No.	Description of Software:	Annual Subscription Cost (2025)	Annual Subscription Cost (2026)	Taxes and Duties	Other	Total Cost
1	Monitoring and Evaluation software for global development projects, featuring effective tools for performing complex aggregation and disaggregation of indicator data, donor allocation and reporting, and project management.					
2						
3						

4						
					Subtotal	
					VAT/Tax	
					*Total Price (Goods) *Include this amount in the Total Bid Price box (above)*	

Please list assumptions regarding the costs reflected above, including any pricing implications of increased user base, as relevant.

Software will be delivered on this date: _____ Bidder Initials: _____

Bid Information: Services					
Item No.	Services	Estimated Hours Required	Fixed/Hourly Rate, if Applicable	Estimated Performance Dates	Total Cost
1	Discovery and Planning				
2	Stakeholder Engagement and Change Management				
3	Platform customization				
4	Data Migration and Data Archiving				
5	User Testing				
6	Documentation, Training and Deployment				
7					
				Subtotal	

VAT/Tax	
*Total Price (Services) *Include this amount in the Total Bid Price box (above)	

Bidder Initials: _____

Terms of Reference (TOR)

Objective of the Assignment

Room to Read is looking for a software solution for Monitoring and Evaluation of global development projects. We are looking for software that has effective tools for tracking results, visualizing data, performing complex aggregation and disaggregation of indicator data, donor allocation and reporting, and project management. We are additionally looking for a software vendor to provide direct and ongoing support to our team during the stages of platform development from customization to site deployment and training.

Our goal is to have a centralized and accessible global database ("our single source of truth") for program and project data, reflective of the operational models implemented across Room to Read's portfolio to reach beneficiaries, and the indicators used to monitor success internally and report externally. We will look to present performance data in easy, digestible visualizations for managing the lifecycle of projects and for driving evidence-based decision-making for project management and resource allocation. We will also look to reduce repetitive data collection processes and integrate with relevant Room to Read systems, such as Nonprofit Success Pack (NPSP) and Survey CTO.

Background of Room to Read

Room to Read's mission is to nurture foundational learning skills in children. Our contextualized approach develops children's literacy and life skills in a dignified and gender-equal way. We nurture these essential skills in children by training and coaching educators, creating quality learning materials and spaces, strengthening education systems, and delivering programs directly and with partners — all while honoring the dignity of every child. Since our founding in 2000, Room to Read has benefited more than 50 million children and has worked in 28 countries.

Our current global database has been at the core of Room to Read's success since our earliest days. With over 300 users across the organization, the database has been key to storing, tracking, and reporting on our program performance to investors, volunteers, and other supporters. The system is actively used by multiple stakeholders across the organization, including country directors, country and global program teams, country and global RM&E teams and program operations. Under the current data structure, the database is built around tracking Room to Read's core suite of programming: libraries and literacy instruction at school sites, our book publishing collection, and our girls' education and gender equality programming at school sites. Until recently, the database also supported our fundraising team to match investors to projects and to manage donor benefits such as dedication language, school plaques, and standard and custom project reports.

However, over the last five years, the models for delivering our programs and projects have become increasingly flexible and customized. We have moved away from delivering comprehensive programming only to delivering more dynamic models designed to meet new goals around system integration and scale. Additionally, we have expanded our project portfolio to new geographies and implementation through partnership in these new locations has continued to grow. By nature, these custom-designed modalities do not conform to our legacy data structures, reporting or workflows. At the same time, these diverse models for program and project delivery inherently require stronger systems for management and oversight than our current database can provide.

Project Overview

Room to Read will work with the vendor to customize their monitoring and evaluation solution to meet our evolving needs as a development organization, which includes organizing information across various geographic locations and operational models, streamlining analysis and reporting results efficiently. We will also work with the vendor to migrate our historical data to the new platform and prepare to bring forward integrations with relevant Room to Read systems. Our historical data includes data that is stored in our current database, as well as data that is stored in repositories outside of the system because it did not conform to the data architecture.

By the beginning of 2026, we will be ready to deploy the new monitoring and evaluation solution across our global offices. We will work with the vendor to create and deploy training resources to worldwide users and ensure there is an ongoing support structure in place as users become familiar with the new system.

Scope of Work

The vendor selected will work in partnership with Room to Read to conduct the following:

- Discovery and Planning
    - Use existing discovery work done internally to have a clear understanding of Room to Read's needs and the gaps in our current database.
    - Understand challenges faced with current database that we will work to mitigate as we transition to a new platform.
    - Use existing theory of change, results frameworks, and other internal documents, as well as discussions with core project staff, to have a clear understanding of the schema that will drive development of data architecture in the new solution.
    - Orient the core project team to the platform and the decisions that will need to be made for design.
    - Present what needs to be decided and completed to customize the software and assist Room to Read in making choices about how to organize our information in the new system and identifying any additional discovery work that needs to be completed.

- Stakeholder Engagement and Change Management
    - Based on lessons learned from similar projects, recommend engagement and communication strategies for managing change as we transition to the new platform.

- Platform customization
    - Customize features/functionality to meet Room to Read's needs.

- Data Migration and Data Archiving
    - Assist Room to Read staff in identifying and facilitating the completion of data migration from our current database to the new solution.
    - Make recommendations on data archiving and backup solutions.

- User Testing
    - Develop a strategy for user testing to be carried out by Room to Read.

- Documentation, Training and Deployment

- o Ensure full documentation for the architecture, set-up and maintenance of the systems/tools developed.
- o Develop strategies and entities to support ongoing management and maintenance of the platform.

Deliverable Schedule

Deliverables	Details	Timeline
Discovery and Planning	Work in close collaboration with Room to Read to review and discuss relevant internal documentation and our new strategic direction. Orient core project team to the platform and the choices available for design. Develop an implementation plan and a view to the decisions that need to be made, including any additional Discovery work that needs to take place.	July to August 2025
Customization	Customize the platform and any localization in line with requested data specifications.	August to October 2025
Data Migration and Archiving	Assist Room to Read in developing a strategy and process for completing data migration and archiving.	October to November 2025 (timeframe indicated is for migrating the most critical data; however, we expect all data migration to take place overtime and in parallel to and after deployment and training)
Testing	Develop and support implementation of a strategy for user experience testing and incorporate feedback before finalizing design.	November to December 2025
Deployment and Training	Ensure the environment is ready for deployment. Provide relevant tools for documentation, deployment and training. Assist Room to Read in providing initial training and support handoff of the platform	January to February 2026

Evaluation Criteria

Software Solution: Room to Read is looking for dedicated monitoring and evaluation software. We are especially interested in solutions that offer the features below.

- Analysis and Visualizations: Native ability to analyze trends, (dis)aggregate data, compare results, provide intuitive visualizations, with the ability to use both quantitative and qualitative data for these purposes.
- Sharable Dashboards: Key metrics that can be displayed in interactive dashboards which in turn can be embedded on web pages and shared with external stakeholders, from donors to partners to government entities
- Data Approvals and Locking: Data collected in the field can be submitted to an approval process before it is committed to the database; once approved, or once the reporting period has passed, the data can be "locked down" so that only data owners are able to make changes.

- Mobile/Offline Data Collection: Seamless integration with mobile/offline data collection tools like SurveyCTO.
- Built-In Geographical Intelligence: Accurate geotagging that allows for interactive mapping that supports a true portfolio view of the organization's activities across geographies.
- Donor Allocation and Reporting: Ability to allocate "scopes of work" to donors that are funding certain activities and therefore, receive specific benefits.
- Data Security and Privacy Protocols: The solution must incorporate robust data security measures, including encryption, secure user authentication, and access controls, to protect information. Additionally, it must comply with applicable data privacy regulations such as GDPR, other privacy laws, or local laws, ensuring secure data handling and storage throughout the software lifecycle.
- Scalability: System supports worldwide users as a high traffic site; is responsive, reliable and cost-efficient as demand grows.
- Ease of Use and Configuration: Flexible data architecture that allows administrators to make changes as needs evolve.
- Integration Capability: Robust, scalable and highly accessible API. Track record of clients that have achieved successful integrations, with reference to types of solutions.

Vendor: As mentioned under the Technical Proposal section of the Bid Form, Room to Read as the project lead, will oversee all phases of the project and ensure coordination and communication across departments. The selected vendor will work under the guidance of the Senior Director of International Program Operations based in the United States, and in partnership with the design team, a cross-departmental team of colleagues who will work directly with the vendor to customize the site, manage data migration, and facilitate training. Room to Read will finalize a project implementation plan with the vendor and establish regular check-ins to discuss progress. Correspondingly, Room to Read will look to the vendor to provide the tools and ongoing engagement structure required to setup the site according to our data specifications. We will also look to the vendor to lead on what needs to be decided and completed (to stay in accordance with our timelines) until we get to the point where our worldwide teams begin to use the platform for data-entry and reporting. We are interested in vendors that demonstrate the qualifications below.

- Access to high caliber staff with relevant professional experience to support the assignment, namely software engineers and data scientists who are subject matter experts in the field of monitoring and evaluation and can advise Room to Read on how best to structure our data for initial setup and as our results framework evolves.
- Expertise in project management and effective communication strategy to support the assignment.
- Expertise in technical development and operations from start to production.
- Expertise in setting up a highly transparent iterative development, design and feedback process allowing for review, comment, and issues to be addressed as quickly as possible.
- Analytical agility to adapt to the strategic plans and current and future needs of Room to Read.
- High-level management support to migrate data from our current data system and repositories to the new platform.