

## Request for Proposal

### “Credit Suisse Signature Program: Educating 45,000 Students”

#### Executive Summary

Credit Suisse, a world-leading financial services company, requests proposals from qualified non-governmental organisations (NGOs), working at regional or international levels, in support of a global signature program. Only qualified not-for-profit institutions may submit a proposal to meet the objectives of the program described in this initial Request for Proposal (RFP). The total estimated amount for the program is USD 9 million over two years. It is estimated that two-year grants would be awarded to a small number of NGOs who demonstrate successful programs that supply innovative education opportunities in developing countries on a significant scale (serving more than 3,000 children). Follow-on grants are expected.

Credit Suisse supports communities across the globe through regional philanthropic programs in Europe, the Middle East, Africa, the Americas, Switzerland and Asia. These portfolios have historically had some focus on providing educational opportunities for disadvantaged youth. Based on the Bank's successful philanthropic efforts over the past several years, Credit Suisse is launching a global signature program in the field of education. The Signature Program “Educating 45,000 Students” (Program) aims to provide 45,000 disadvantaged primary/secondary students with access to quality education within a two year time period. The significance of “45,000” is that is also representative of the number of Credit Suisse employees. This Program seeks to provide spaces in school on behalf of each one of our 45,000 employees.

Credit Suisse recognises three primary obstacles facing poor communities in their efforts to provide quality education for their children: 1) lack of schools and/or access to them, 2) a shortage of or poor quality instruction and 3) ineffective school management. Successful proposals will address these obstacles with innovative and integrated approaches.

Additional discussions will take place with short listed applicants regarding accounting procedures, insurance, payment methods, and overhead costs.

Questions regarding this RFP can be submitted via email no later than December 10, 2007 to [London.charity@credit-suisse.com](mailto:London.charity@credit-suisse.com)

**Initial replies (not exceeding a 10 page narrative) should be submitted in both print and electronic form no later than January 10, 2007 to:**

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United Kingdom  
+44 207 8833 507

**Inquiries must be submitted with the completed Summary Sheet (attached) as part of the request.** Credit Suisse bears no responsibility for the costs of proposal preparation. Please do not submit video tapes or CD-ROMS or any other promotional materials.

## **Scope of Work**

### **Background:**

Credit Suisse recognises three primary obstacles facing poor communities in the provision of quality education: lack of schools and/or access to schools, a shortage of or low quality instruction and ineffective school management. Credit Suisse wishes to address these obstacles with an integrated and innovative approach as part of a newly created global signature philanthropy program. Primary to this program is that support provides increased capacity to serve/enroll students allowing for 45,000 children to be educated. Programs may operate in developing countries around the globe but with a focus on Asia, Africa, Latin and South America and will serve disadvantaged youth and primary/secondary school aged children.

### **Program Purpose**

The Program aims to provide 45,000 disadvantaged primary/secondary school students with access to quality education within a two year timeframe.

### **Program Objectives**

The program will improve educational opportunities for disadvantaged primary/secondary students in targeted communities through the provision of educational infrastructure, improved teaching and learning quality, and strengthened school management through increased community involvement. Credit Suisse defines disadvantaged youth as those living in extreme poverty in developing or under developed countries where receiving an education will have economic benefits. In particular, Credit Suisse recognises the often extraordinary challenges faced by girls in poor communities and encourages programs that address these obstacles. Credit Suisse encourages an innovative approach and the identification and selection of target communities. This may include the leveraging of local government efforts, and ministries. The overall objective is to support successful and innovative programs that can educate more students throughout the developing world.

Selected partners will be required to establish baseline measurements for school enrollment and school completion. A correlation between Credit Suisse support and increased enrollment and school completion are key impact indicators. In an effort to reach 45,000 students, innovative solutions and low cost programs with demonstrated impact will be key.

### **1. School Construction and Maintenance**

Communities around the world lack access to schools. Infrastructure investments in primary and secondary schools help address this deficiency. Infrastructure investments must target those communities that are prepared to provide local support and can leverage the strategic priorities of local and national governments, Ministries of Education, United Nations Development Program, and similar donor support.

Successful programs for consideration by Credit Suisse will increase access to primary education through school construction, school establishment, or by addressing barriers to education like school fees or tuition. Infrastructure investments may incorporate maintenance costs over a longer period as well as other capital needs such as classroom furniture, equipment, libraries and computers and other technology.

### **Proposed Indicators Include:**

1. Increased percentage of student enrollment rates in targeted communities
2. Increased percentage of student completion rates in targeted communities
3. The number of primary schools constructed, furnished and equipped

## **2. Improved Quality of Teaching and Learning**

Poor and disenfranchised communities systematically face low quality instruction. School infrastructure alone can not address the destructive impact of low quality instruction. Poor instruction limits the development of skills and knowledge necessary for disadvantaged students to successfully enter the modern workforce. Poor instruction and unfavourable educational environments also have direct impact on low attendance.

The provision of improved quality of teaching and learning should be based on the most recent research in this field. Potential partners will be required to identify key components of this program but Credit Suisse will provide particular consideration for programs that include teacher training and the use of the latest in appropriate technology. Programs in this area that also include school construction or maintenance will be given primary consideration.

As much detail on computer packages and software should be provided and innovative approaches to the maintenance of the IT equipment and teaching should also be identified.

### **Proposed Indicators Include:**

1. A demonstrated increase in the percentage of teachers within in a community who are using improved and effective methodologies
2. A demonstrated correlation between the increased teacher training and the ability to successfully serve more students
3. An improvement in test scores (test to be determined) as a result of technology or teacher training

## **3. Strengthened School Management**

Ineffective school management and lack of accountability perpetuates poor instruction. Ineffective school management obstructs progressive efforts to improve educational environments. Community involvement in school oversight is a proven and viable solution to this challenge.

Increased community participation in school oversight, when structured effectively, will improve accountability, transparency and ultimately school management. Implementing partners should propose effective capacity building programs to increase the understanding and acceptance of community involvement among school administrators while improving the skills and confidence of parents and the community to remain engaged. Training may include: strategic planning, budgeting, performance-based management, and use of IT. A successful program will develop the capacity of Parent Teacher Associations (PTA) or similar local entities or expand community/parent involvement.

### **Proposed Indicators Include:**

1. Increased numbers of school administrators trained
2. A demonstrated increase in the number of schools employing effective management systems and their impact particularly in the area of increased enrollment
3. An increase in the number of communities with engaged community boards/PTA's or other involved established entity

### **Proposal Evaluation Criteria**

Credit Suisse will evaluate each proposal against the following criteria:

1. An integrated approach to reach all three objectives will be given primary consideration
2. Proven partner capability
3. Program design
4. Program scale – The initial proposal should clearly delineate the current population served as well as how support will increase numbers served
5. A strong monitoring and evaluation plan that clearly tracks inputs, outputs and progress towards objectives. A plan for collecting baseline and follow on data should be included.
6. Program deliverables – The initial proposal should clearly delineate the connection between the proposed activities and the results in terms of improved educational opportunities and numbers served. Proposals that identify targets for proposed indicators will be favoured.
7. Management and Technical Capability – The proposal should identify the key staff assigned to this project. An appropriate balance between management and technical expertise should be represented.
8. Utilisation of Local Partners – Background information and capabilities of local partners should include length of working relationship, details of local partner involvement in design, implementation and management of programs, and proper accounting controls.
9. Branding and Visibility – Credit Suisse looks to our implementing partners to describe how the program can be communicated, both to the targeted communities and to the larger public (e.g. press releases, media interviews, site visits, VIP visits, success stories) Key benchmarks or visibility opportunities should be identified (e.g. program launch, publication of reports, student test results, local government endorsements)

### **Proposal Submission and Expectations**

This RFP represents an initial request for information on programs that meet the funding criteria set out by Credit Suisse. All proposals must be received by January 10, 2008. Please note that a more extensive proposal will be required for a small pool of NGOs that meet the initial review criteria and that the following reports submitted by the funded implementing partner programs will be required:

- Work Plan to be submitted within 60 days after grant award will program activities, timeline and benchmarks.
- Performance Monitoring Plan to be submitted within 60 days after grant award will outline measures and instruments for tracking results.
- Quarterly Reports are due within 30 days after the close of the quarter. They will include financial and program reporting.
- Annual Reports containing progress made as measured by indicators in the Performance Monitoring Plan
- Final completion report will detail program activities, inputs, impact indicators, recommendations and lessons learned.

This Initial RFP in no way obligates Credit Suisse to award a grant.

**“Credit Suisse Signature Program: Educating 45,000 Students”  
Initial Proposal Summary Sheet**

**Organisation Information**

Organisation’s Name: \_\_\_\_\_

Address: \_\_\_\_\_

City/State/Country: \_\_\_\_\_

Contact Person, Title and Phone Number: \_\_\_\_\_

Organisation Web Site: \_\_\_\_\_ Email: \_\_\_\_\_

Organisation Mission: \_\_\_\_\_

\_\_\_\_\_

Countries of operation: \_\_\_\_\_

Number of beneficiaries served and % that are children: \_\_\_\_\_

Charity Registration (please check one):  UK Charity Registered  US 501(c)(3)  Other

If other, please specify: \_\_\_\_\_

**Type of support being requested (check all that apply):**

School Construction and Maintenance

Improved Quality of Teaching and Learning

Strengthened School Management

Other: \_\_\_\_\_

**Program Information**

Brief Program Description and Objectives: \_\_\_\_\_

\_\_\_\_\_

Annual Program Budget: \_\_\_\_\_

Countries of Program Implementation: \_\_\_\_\_

Number of Program Beneficiaries (by country): \_\_\_\_\_

**Funding Request**

Requested Amount: \_\_\_\_\_

% of Request Allocated to Overhead: \_\_\_\_\_