

REQUEST FOR PROPOSALS (RFP)

RFP Number: RG003

Issuance Date: Monday, June 18, 2018

Closing/Submission Date: Monday, July 16 at 5pm EST

Submission Location: U.S. Overseas Cooperative Development Council
Research Group
researchgroup@ocdc.coop

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1 SECTION A: REQUEST FOR PROPOSALS (RFP) OVERVIEW

RFP No: RG003

RFP Title: What difference do cooperatives make? Country Research Study

RFP Issued By: US Overseas Cooperative Development Council (OCDC), implemented by OCDC's Research Group, under an NCBA CLUSA sub-award funded by the United States Agency for International Development (USAID) as part of its Multi-Country Research Initiative examining the role of cooperatives in the economic and social well-being of members and communities.

Issuance Date: Monday, June 18, 2018.

Pre-Proposal Conference: Monday, July 2 at 9am EST

Register by emailing researchgroup@ocdc.coop. Details on how to enter the call will be emailed to all registered participants.

Registration for Information: To ensure you receive any modifications to the RFP, send an email to researchgroup@ocdc.coop requesting that your organization be put on the distribution list. Details on how to enter the Pre-Proposal Conference call will be emailed to all registered participants.

Submission of Questions regarding the RFP: Questions regarding the RFP should be submitted in writing to researchgroup@ocdc.coop no later than June 27, 2018 at 5:00pm EST. OCDC will send answers to questions to all registered parties by July 3 at 5:00pm EST.

Closing/Submission Date and Time: Monday, July 16 at 5pm EST

Instructions for Submission of Proposals: In order for a proposal to be considered, one soft (electronic) copy of the complete technical and cost proposals must be delivered to OCDC's Research Group (researchgroup@ocdc.coop) by the closing date and time specified in this RFP. See Section E of the RFP for detailed delivery instructions.

Estimated Period of Performance: The estimated period of performance is August 2018 – December 2018.

Award: A Fixed Price Contract is anticipated. Issuance of this request for proposal does not constitute an award commitment on the part of OCDC. OCDC reserves the right to make one, more than one or no awards under this RFP. OCDC will not pay for costs incurred in the submission of a proposal. All proposals will be evaluated based on their responsiveness to the technical and cost terms of the RFP.

Budget: The ceiling cost (maximum award amount) for this proposal is US \$75,000.

2 SECTION B: DESCRIPTION OF SERVICES/GOODS

Overview

This Scope of Work details research in the Philippines including gathering data systematically and carrying out statistical analysis of the results. Capabilities sought include sampling, instrument modifications (based on standard instruments provided), data collection through surveys, focus groups and key informant interviews, and statistical analysis. The period for the performance is August - December 2018.

Background

The Research Group of the US Overseas Cooperative Development Council (OCDC) has embarked on a multi-year, multi-country cross-sector regional research study on the effects that cooperatives have on the social and economic well-being of individuals and the broader effects that they have in the communities where they are located. The focus will be on the primary society, but will also take into account second and third level bodies in all countries.

OCDC conducted a pilot in Poland in 2017. Poland was selected for a pilot because several OCDC members implemented cooperative development programs there in the 1990's, aimed at assisting transformation of local cooperative sector. The pilot developed and tested a research mythology including survey questionnaire and focus group and interview guide.

The successful offeror will implement the tested methodology and gather and analyze data. The technical proposal should describe how the research in ***the Philippines*** replicates the method while adapting it to the local context especially for sampling and modifying the instruments to the local language and cultural understanding of the concepts presented.

This Scope of Work addresses the design and implementation of the research in ***the Philippines***. There are two distinct tasks as described below. Offerors are expected to address both tasks. The important intent of this research is that the research be conducted so as to be representative of the cooperative sector in ***the Philippines*** as related to the population as a whole and cost effective. The implementation methods (e.g., how surveys are conducted) are expected to reflect the realities in ***the Philippines***. Please see additional information under Tasks 1 and 2 below.

Definition of Terms:

For the purposes of this research project we define the following terms:

Community: The community is the larger environment in which the cooperatives are located. For this research, the community means non-cooperative members. This community is important because the principals of cooperatives state that a cooperative should be linked to and create impact in the community.

Cooperative: For the purposes of this research, a cooperative is an institution that upholds the international cooperative principles and holds legal status as a cooperative in ***the Philippines***. In addition, the research is to be representative of the cooperative sector in ***the Philippines***.

Methodology and Research Questions

The research design, sampling plan, and instruments were developed during a pilot, the technical proposal should include a detailed explanation of how the Offeror will implement the provided research methodology (see Pilot Methodology included) in ***the Philippines***.

The research study will include mixed methods to answer the following research questions:

1. Do cooperative members benefit economically from their cooperative membership and participation?
2. Do cooperative members benefit socially from their cooperative membership and participation?
3. Do communities benefit economically from the presence of cooperatives?
4. Do communities benefit socially from the presence of cooperatives?

The Research Group expects that the Offeror will present a country specific implementation plan to replicate the sampling plan and sound methodology, provided below and previously piloted, for creating a representative sample of the community (non-cooperative members) and cooperative members and answering these research questions using quantitative and qualitative data. The implementation plan should maintain the integrity of the methodology, while making any necessary adjustments to the local context.

Task 1: Quantitative survey of cooperative members and community members. This survey will be representative of *the Philippines'* cooperative members and will include a large enough sample to significantly show the effects of cooperative membership, as stated in the four research questions above. Both sampling groups should be representative and random (or using another representative sampling method)¹:

1. Cooperative Members
2. Non-Cooperative Members

Task 2: Qualitative key informant interviews and focus groups to more deeply answer the four research questions above. The Research Group expects that qualitative data will be collected through focus groups and key informant interviews with:

3. Cooperative Members
4. Cooperative Leaders (Board Members)
5. Community Leaders (non-cooperative members and cooperative members who play a significant role in the community)

The Research Group seeks to answer the preceding research questions using data from cooperative members, the general (non member) public, cooperative leaders, and community leaders through quantitative surveys, focus groups, and key informant interviews. The Offeror will identify and coordinate with the participants. The Offeror will create a sampling plan, modeled after the pilot, to identify cooperatives, regions, and individuals to be included in the research to ensure that the results are representative and align with the research mythology provided. After approval by the RG, the Offeror will conduct all focus groups and informant interviews and incorporate the data thus gathered in its report.

Period of performance:

Work under this Scope of Work will start in August 2018 and end in December 2018. See below for timeline related to specific deliverables.

¹ In the Poland Pilot, quotas and snowball recruitment methods were used to build the cooperative member sample because a randomized sample was not possible. The comparison sample of the general population was random. See the Pilot Methodology included for more details.

Proposal Requirements

1. The technical proposal should include a detailed explanation for the implementation of the provided research methodology. It should also include a proposal of data collection method(s) including but not limited to: plan for reaching participants, mode of communication, and method of recording data. Note: OCDC's key concern is representativeness.
2. Include a **sampling plan** for the general population (specifically non-cooperative members) and cooperative members in ***the Philippines***.

The sampling plan included in the proposal should closely reflect the pilot research methodology presented in this SOW and maintain representativeness. The sampling plan should contain precise details that the Offeror will use to identify the *locations* from which the sample should be selected and the *method* used to collect the sample. It should also stipulate the required documentation of procedures carried out during the sampling process. The Sampling Plan will be discussed, revised if necessary, and finalized during the early stage of the work.

3. Include an **implementation plan** following closely the pilot methodology. The implementation plan should maintain the integrity of the pilot methods but take into consider any cultural, linguistic, or operational adaptations for ***the Philippines***. The implementation plan should clearly describe data collection method(s) for:
 - a. **Task 1:** representative survey of cooperative members and non-cooperative members
 - b. **Task 2:** focus groups of cooperative members, and key informant interviews with cooperative members, cooperative leaders, and community leaders based on the sampling plan

The implementation plan should include target numbers² necessary for significant, meaningful and generalizable findings and explanation of the rationale for the sampling as laid out in the sampling plan. OCDC requires the research to produce generalizable findings and for this purpose, a representative sample is necessary.

The aim of the Research Group is to address its research questions in a concise and understandable fashion within the available financial resources and time frame. Thus, it will be important to select the right indicators for accuracy. It will also be important for reasons of cost and of clarity to limit the number of questions and indicators.

The implementation plan should include:

- a. A description of the process that the Offeror will use to **adapt the provided instruments** and administration of surveys, focus groups, and interviews for cultural context and local languages (see the Pilot Methodology attached). The instruments will be shared with the winning contract. OCDC welcomes proposals from responding companies but provides as guidance the following:
 - i. Multiple-choice surveys should result in comparable qualitative data using as a guide the multiple-choice questions about participant demographics,

² The Poland Pilot used a sample of approximately 1000 cooperative members and 1000 non-cooperative members. If a smaller number is proposed, please include justification including ability to maintain statistical significance.

- participation in the cooperative, and the social and economic effects of the cooperative.
- ii. Key informant interviews should last approximately 30 minutes and ask demographic information, ask multiple-choice questions about participant demographics, participation in the cooperative, and the social and economic effects of the cooperative, and ask for additional short answer qualitative responses. Selection of key informant interviews will be proposed by the Offeror.
 - i. Focus Groups will be conducted with cooperative members. The focus groups should triangulate information collected in the key informant interviews. The size of the groups, sampling methods, and location of the focus groups will be proposed by the Offeror.
- b. **Approach to test for reliability and validate** all the instruments on a small group of respondents for cultural and lingual understanding. The technical proposal should explain how the instruments will be tested and changes proposed to OCDC. This step will be very important to the overall validity of the research and applicability to ***the Philippines***.
 - c. **Approach to Conduct** surveys, key informant interviews, and focus groups observing an internationally recognized code of ethical research standards.
 - d. **Approach and Considerations to Prepare data.**
 - i. **Task 1:** OCDC expects that quantitative survey data will be presented in an organized and cleaned excel file. OCDC will have full access to the completed data set. Data set must be prepared in English. A key to the data set and multiple-choice questions will be provided to OCDC. Data should be in compliance with USAID data regulations and international quality standards. All data will be published on USAID’s data database at the completion of this project.
 - ii. **Task 2:** Qualitative responses from key informant interviews and focus groups will be reviewed and transcribed in English by the Offeror. The Offeror will create a framework, informed by the quantitative results, for coding and analysis of qualitative data.
 - e. **Approach to Analyze** results.
 - i. **Task 1:** Quantitative Results
 1. Preliminary quantitative analysis and report. OCDC expects the analysis to include:
 - a. Descriptive statistics
 - b. Response frequencies for all survey questions
 - c. Preliminary statistical results showing economic and social effects of cooperatives
 2. OCDC will review and discuss the preliminary results with the Offeror thus determining any additional statistical analysis to be completed
 3. Final analysis
 4. **Final report on quantitative results:** The final analysis will be presented in the final report

iii. **Task 2: Qualitative Results**

1. The Offeror will offer a synopsis of qualitative findings
 - a. Descriptive statistics
 - b. Synopsis of qualitative findings
 - c. Themes and trends
2. OCDC will review and discuss the preliminary results with the Offeror thus determining any additional analysis to be completed.
3. Final analysis
4. **Final report on qualitative results:** The final analysis will be presented in the final report.

Pilot Methodology & Analysis

The methodology designed and implemented through the Poland Pilot is described below along with several lessons learned. This methodology should be closely modeled in the technical proposal. The RG understands that the methods and instruments used will be adapted for the local context and cultural understanding, but for comparability of data, it is critical that the methods remain uniform.

Instruments & complete reports from the Poland Pilot will be provided upon award of the contract.

Sample Method:

Task 1: Quantitative

1. Random & Representative Population Sample: Participants were surveyed using a random phone calling system. Participants were asked whether they were a cooperative member or not and were then administered the correct line of questioning. Cooperative members identified through the random calling were included in the cooperative member sample. All surveyed participants were asked demographic information.
2. Representative Cooperative Members Sample: In the pilot country, the researchers were unable to randomly identify a sufficient number of cooperative members. They also were not able to receive access to contact information for members through cooperatives. For this reason a snowball sampling and quota based method was used to create the sample. The sample was representative to the national distribution of cooperative sectors.

Task 2: Qualitative

3. Focus Groups: Focus groups were created by sector and region. The primary sector for each region was identified by national statistics. The focus group time and location was advertised to cooperatives of the selected sector and potential participants were contacted to confirm participation. A snowball sampling method was used to ensure sufficient participation. Only one person per cooperative participated to ensure participants' ability to speak freely.
4. Key Informant Interviews: Focus groups and cooperative contacts helped the researchers identify key informants for interviews. One cooperative leader and one community leader were interviewed for each geographic region and sector. No overlap of participants was allowed between interviews and focus groups.

Analysis Method:

Task 1: Quantitative

Participants from both sample groups were asked the same demographic information to allow for comparison between cooperative members and non-cooperative members on demographic, economic and social status questions. Cooperative members should not be included in the comparison, non-cooperative members.

Member and community specific questions are opinion based and were not compared between groups. Some cooperative member questions, identified by the researchers and OCDC, were disaggregated by sector to enhance understanding.

The analysis was organized by research question and related survey questions and their statistical analysis were included. Both frequencies of responses and more advanced analysis of significance of frequencies and comparison of answers were included.

Task 2: Qualitative

Qualitative data was transcribed and a summary of focus groups and interviews was included in the final report. A synthesized analysis of trends and themes was created for each of the four research questions.

Additional details and guidance regarding requested data:

The following indicators are utilized to operationalize the four primary research questions. Each indicator is subject to discussion based on the cultural and linguistic recommendations of the Offeror. The indicators below are reflected in the instruments provided.

1. How do cooperative members benefit economically from their cooperative membership and participation?
 - a. Household income level
 - b. Household assets
 - c. Women's economic status
2. How do cooperative members benefit socially from their cooperative membership and participation?
 - a. Children in school (girls and boys)
 - b. Educational attainment (girls and boys)
 - c. Family health status
 - d. Social capital (women and men)
 - e. Increased agency (women and men)
3. How do communities benefit economically from the presence of cooperatives?
 - a. Local GDP
 - b. Infrastructure
 - c. External investment
4. How do communities benefit socially from the presence of cooperatives?
 - a. Health service availability
 - b. Educational service availability
 - c. Community engagement and participation

Proposed Deliverable Schedule:

The estimated schedule for performance and payments is set out in the table below. While observing the final deadlines, Offerors may propose variations within this schedule. A deliverables based payment schedule will be used.

<u>Deliverable/Task</u>	<u>Period</u>	<u>Payment Schedule</u>
Sampling Plan	Aug 1 – 15, 2018	
Draft Sampling Plan Submitted	August 8	
Client response to Draft Sampling Plan	August 10	
Final Sampling Plan Submitted	August 15	
Implementation Plan	Aug 1 – 15, 2018	
Draft Implementation Plan Submitted	August 8	
Client response to Draft Implementation Plan	August 10	
Final Implementation Plan Submitted	August 15	
Instrument Adaptation: Survey, Focus Group, & Interview	Aug 1 – 15, 2018	
Adapted Instruments Submitted	August 8	
Client response to Adapted Instruments	August 10	
Final Instruments Submitted	August 15	Payment #1 (15%)
Test & Validate Instruments	Aug 16 - 24	
Test results & Instrument changes submitted to Client	August 24	
Client approves final instrument	August 31	Payment #2 (15%)
Conduct Research	Sep 1 – Oct 15	
Descriptive Report & Data Set presented to Client	Oct 26	Payment #3 (20%)
Conduct Analysis	Oct 29 – Nov 16	
Draft Report	November 23	
Draft #1 presented to client	November 23	Payment #4 (20%)
Client response to Draft Report	November 30	
Draft #2 report submitted	December 7	
Client response to Draft report	December 14	
Final Report Submitted	December 21, 2018	Payment #5 (30%)

This agreement may be extended by mutual agreement in writing.

3 SECTION C: PROPOSAL AND AWARD PROCESS

WHO CAN SUBMIT PROPOSALS?

This RFP is open to *Philippine* entities and entities with significant experience and ability to conduct research in *the Philippines*. The proposal must show that the Offeror can ensure access to *Philippine* cooperatives and reduce language barriers.

- Non-profit entities
- For-profit entities
- Universities

HOW TO SUBMIT AN PROPOSAL

See Section E of the RFP for full instructions on the delivery method and contents of the proposals. Incomplete or late proposals will not be considered.

WHAT SHOULD WE DO IF WE HAVE QUESTIONS OR NEED ASSISTANCE TO PREPARE A PROPOSAL?

Submit questions by email by June 27, 2018 at 5:00pm EST to researchgroup@ocdc.coop. Telephone inquiries will not be accepted. Answers to questions will be sent out to all registered parties and answered during the Pre-Proposal Conference on July 2, 2018.

AMENDMENTS TO THE RFP

Any amendments to the RFP will be issued in writing to all parties who have registered their interest with OCDC.

HOW DO I REGISTER IN ORDER TO RECEIVE NOTIFICATIONS OR AMENDMENTS TO THE RFP?

Any parties who have contacted OCDC in writing to express interest are automatically registered to receive amendments and notifications. All others should send an email to researchgroup@ocdc.coop.

WHAT IS THE ESTIMATED TIMELINE FOR SUBMISSION, NOTIFICATION, AWARD, AND IMPLEMENTATION?

Proposals must be submitted by the due date indicated on the cover page of the RFP.

The selection process will take place in July 2018 and Offerors can expect to be notified of decisions on or about July 20, 2018. Awards will be contingent on obtaining USAID approval, if required. Activities are expected to begin around August 1, 2018 pending successful completion of negotiations, the results of the pre-award survey, and the checking of references.

The estimated period of performance is August 2018 – December 2018.

WHAT TYPE OF AWARD WILL BE MADE?

A fixed price contract will be made.

OCDC will not provide any supplies or equipment to the Subrecipient. The Offeror should include any necessary supplies or services (translation etc.) in the budget in the cost proposal.

HOW WILL PROPOSALS BE EVALUATED?

A Selection Committee of experts from the Research Group and OCDC will evaluate proposals. The Selection Committee will use the evaluation criteria in Section D of the RFP to make a selection.

WHAT ARE THE MINIMUM ELIGIBILITY REQUIREMENTS FOR A PROPOSAL?

The following requirements need to be met in order for a proposal to be reviewed:

- The proposal must be submitted by the due date and time
- The proposal must be complete
- The proposal must cover all the services required under this RFP

CAN A JOINT VENTURE SUBMIT A PROPOSAL OR CAN A SUBRECIPIENT BE INCLUDED IN THE PROPOSAL?

A joint venture is a legal arrangement where two entities jointly undertake work as equal partners. To be eligible for award, a joint venture must be an entity with legal status. Email the Research Group (researchgroup@ocdc.coop) to verify whether your joint venture is eligible for award before submitting a proposal. OCDC may also award the two described sections of the work to two different entities.

A subaward occurs when the subrecipient subawards part of the work to another entity. A subrecipient can be included in the proposal so long as the work being done by each entity is clearly defined in the proposal. A subaward will require prior approval and should be included in the proposal. Complete information on the subrecipient must be included.

CAN PROFIT, FEE, OR A 'CONTINGENCY' LINE ITEM BE BUDGETED?

The budget can include reasonable profit, fee, or a contingency line item. This shall be taken into consideration during the evaluation.

WHAT WILL BE REQUIRED FOR ISSUANCE OF AN AWARD?

The OCDC's Research Group may request additional information to clarify or substantiate information provided in the proposal or may request revisions to the proposed approach or personnel. After selection, OCDC will negotiate the award with the selected Offeror.

A contract will be negotiated after the selected Offeror successfully undergoes a pre-award survey to assess the selected Offeror's management capacity and financial capability and after references have been checked. In addition, a background check of the organization will be completed before the award is issued using the Office of Foreign Assets Control (OFAC) Specially Designated Nationals and Blocked Persons List.

WHAT WILL BE REQUIRED AFTER AN AWARD IS MADE?

Section B describes the Services that will be required of the Subrecipient. Periodic meetings with OCDC's Research Group will be required.

4 SECTION D: EVALUATION CRITERIA

Proposals will be evaluated in accordance with the criteria set forth below. To facilitate proposals, Offerors must organize the sections of their proposals in the same order provided in Section E of this RFP.

Technical & Cost Evaluation

Criteria	Maximum Possible Points
A. Technical	
Maximum Possible Points: 65	
Comprehensiveness of proposal approach. Clarity and appropriateness of proposed activity. Research methodology is reasonable, specific, and achievable and seeks to answer the four research questions proposed. Implementation plan and proposed timeline include all proposed elements of activity.	(Maximum Possible Points) 35
Past performance: Previous successful experience implementing similar research activities.	(Maximum Possible Points) 30
B. Cost Breakdowns	
Maximum Possible Points: 20	
Reasonableness of proposed budget based on scope of activities proposed. Summary budget, detailed budget, and budget notes included.	(Maximum Possible Points) 20
C. Personnel & Management	
Maximum Possible Points: 15	
Key personnel have appropriate level of qualification and experience to lead and to implement project.	(Maximum Possible Points) 15
Maximum Technical Score:	100

5 SECTION E: PROPOSAL OUTLINE AND GUIDANCE

OVERVIEW

To be eligible for consideration, Offerors must use the Proposal Outline provided in this section.

The completed Technical and Cost proposals must be delivered to the submission email (researchgroup@ocdc.coop) on or before the submission deadline. After the deadline for submission of proposals, the Technical Proposal shall be reviewed by the evaluation committee. The Cost Proposal shall remain unopened until the Technical Proposals have been evaluated.

The technical proposal should not exceed 10 pages using the page limit guidance listed below. Attachments and the cost proposal are NOT included in the page limit.

One soft copy of the technical proposal must be submitted in pdf format clearly marked "Technical Proposal – RFP – [Organization Name]." One soft copy of the cost proposal must be submitted in a separate pdf file clearly marked "Cost Proposal – RFP – [Organization Name]." The budget should also include an excel document using the template provided (<https://goo.gl/BwhGua>). Please send one email with two separate attachments.

Offerors are reminded that presentation and legibility are important factors. Please do not reduce the size of tables or charts to the point that they are not legible. We suggest that you do not submit proposals in color or using high-resolution graphics.

Each page should be numbered.

OCDC is not responsible for any costs incurred by the Offeror for preparing, submitting, or revising the proposal.

TECHNICAL PROPOSAL OUTLINE

The Technical Proposal must include the checklist, the following sections (which must be within the page limits set for each section), and attachments.

Technical Proposal Checklist	
Section 1: Cover Page	(limit of one page)
Section 2: Experience/Past Performance (last three years)	(limit of 2 pages)
Section 3: Proposed Approach and Sampling Plan	(limit of 6 pages)
Section 4: Management-Implementation	(limit of 2 pages)
<i>Required Attachments to the Technical Proposals (no page limit):</i>	
Attachment A: One page CVs for Key Personnel	
Attachment B: Project Organizational Chart	

COST PROPOSAL OUTLINE

No Page Limits

Cost Proposal Checklist	
Section A: Cost Proposal Cover Sheet	(no page limit, use the provided form)
Section B: Budget	(template provided https://goo.gl/BwhGua ; please return in an excel file)
Section C: Budget Narrative	(no page limit)

Proposal Sections and Contents

The Offeror **must** follow the guidance given in the rest of this section as to required format and contents of the proposal. The sections have been designed to correspond to the evaluation criteria.

TECHNICAL PROPOSAL CHECKLIST

(Please check all that apply and include this page with the proposal)

Have you submitted your technical and cost proposals to OCDC by email including two separate attachments by the required deadline?

Does your Technical proposal include the following?

- Section 1: Cover Page (not more than one page using the form provided)
- Section 2: Experience (not more than 2 pages) Information on Subrecipients, if applicable
- Section 3: Proposed Approach (not more than 6 pages)
- Section 4: Management-Implementation Plan (not more than 2 pages)
- Attachment A: One page CVs for Key Personnel
- Attachment B: Program Organizational Chart

Technical Proposal Section 1: Cover Page
[Use this form or create one in this format]

Name of Organization: 	Primary Address:
Contact Name: <i>(This must be an individual with the authority to negotiate and enter into a subagreement)</i>	Telephone: Email (at least two): Website:
Type of Entity: <i>(check one)</i> Non Profit For Profit Other (specify)	Year registered:

Authorized Signatory: _____

Name and Title: _____

Date: _____

TECHNICAL PROPOSAL SECTION 2: EXPERIENCE

(Limited to 2 pages)

This section should include information on your organization and proposed key personnel. If you will be implementing the program with a Subrecipient, please provide similar information for them. Provide the information in the format provided.

Similar services provided

Please complete the following table with information on the similar services your organization has provided in the last three years.

Country	Programs/Services	Start and End Dates	Funding Source

Provide additional information on how these services are similar to the services required for this program:

Other relevant experience

Please complete the following table with information on other relevant experience

Location	Description of services provided	Start and End Dates	Funding Source

Key personnel

Identify the positions you consider key to the success of your proposed approach and the individual who will fill each position. Provide a one page CV with three references for each named individual as an attachment to the proposal

Title	Name

Past Performance References for Your Organization

Provide three past performance references for your organization) OCDC reserves the right to obtain past performance information from sources other than those listed below.

Contact (Name and Title)	Organization	Telephone and email	Services and Dates Provided

TECHNICAL PROPOSAL SECTION 3: PROPOSED APPROACH

(Limited to 6 pages)

Description of Proposed Approach

Describe your technical approach for providing the services described in Section B of this RFP. Note: Survey and other data collection instruments will be provided by the RG for appropriate adaptation to the context in *the Philippines*.

For each type of service or deliverable, describe which individual will be providing the service and a timeline for completion.

Each of the following deliverables must be included in your description:

1. Sampling Plan
2. Implementation Plan
3. Design of Instruments
4. Test & Validate Instruments
5. Conduct Research
6. Presentation of Data
7. Analysis

*Note: please provide a technical approach to both Task 1: Quantitative Survey and Task 2: Qualitative Interviews and Focus Groups.

TECHNICAL PROPOSAL SECTION 4: MANAGEMENT-IMPLEMENTATION

(Limited to 2 pages)

This section requests information on how you will manage the program. Include information about how you will work with proposed Subrecipient, if any.

Organizational Chart for the Program:

Attachment B Program Organization Chart should show how this program would fit within the structure of your organization and clearly delineate key management personnel and reporting relationships. As noted in Section B of the RFP, it is required that the Primary Researcher be based in or have significant experience conducting research in *the Philippines*. The Primary Researcher must have the authority to make key programmatic decisions, communicate directly OCDC staff, and be responsible for the direct submission of required reports to OCDC.

Description of Proposed Key Management Positions:

Fill out the following table for all program administrators, managers, and supervisors.

Title	Name (or "vacant")	Program responsibility	Who will they supervise?

Who will be managing the program on a day-to-day basis?

How will staff be supervised and by whom?

How will staff performance be measured and improved?

How will you recruit and train new staff?

Commitment letters of availability by Key Personnel

Please include a brief signed letter from each key personnel expressing interest and availability to perform the research from August-December, 2018.

Subrecipients

Will you be subcontracting part of the work? Identify any subrecipients and describe the roles and responsibilities of each organization for this program.

Implementation Challenges

Identify any important external factors beyond your control that may affect the successful implementation of the program.

Internal Monitoring

Describe how you will monitor the performance and the quality of services provided under the subagreement. Also describe your plan to monitor for fraud and malfeasance.

COST PROPOSAL CHECKLIST

(Please check all that apply and include this page with the proposal)

Have you submitted your technical and cost proposals to OCDC by the required deadline?

Does your Cost Proposal include the following?

- Section A: Cost Proposal Cover Page (*template provided*)
- Section B: Budget (*excel template provided*)
- Section C: Budget Narrative
 - For the Budget, Have You:
 - Included a detailed budget for any subcontracts?

COST PROPOSAL SECTION A: COVER PAGE

[Use this form or create one in this format]

<p>Name of Organization:</p>	<p>Primary Address:</p>
<p>Contact Name:</p> <p><i>(This must be an individual with the authority to negotiate and enter into a subagreement)</i></p>	<p>Telephone:</p> <p>Email (at least two):</p> <p>Website:</p>
<p>DUNS Number:</p> <p><i>A DUNS number will be required for this award (https://fedgov.dnb.com/webform).</i></p>	
<p>Type of Entity: <i>(check one)</i></p> <p>Non Profit</p> <p>For Profit</p> <p>Other (specify)</p>	<p>Year registered:</p>

Authorized Signatory: _____

Name and Title: _____

Date: _____

COST PROPOSAL SECTION C: BUDGET GUIDANCE

General

A Budget Template, in an excel document (<https://goo.gl/BwhGua>), has been provided as an attachment to this RFP and should be used by the Offeror. The purpose of this budget is to allow OCDC to assess whether the cost proposed is realistic and allowable.

Information on the amount and source of additional funding from non-Research Group sources should be included in the 'other funding' section and described in the budget narrative. All sources of funding for the program activities described in the proposal must appear in the budget under either the Research Group section or the 'other funding' section. The budget should be returned to OCDC in an excel document.

Salaries and Benefits

Include job titles and names.

Each position to be funded under the program which appears in the program organization chart (Attachment B of the Technical Proposal) should be listed in the budget detail and a number of days to be provided under this award.

List all positions on separate lines on the budget.

Consultants

Show the specialty, name, daily or monthly rate, and number of days or months

Travel

Include travel that staff and/or consultants will be taking to support the program at the onset of their responsibilities or as part of their routine activities such as supervision and monitoring.

Include who will be traveling, number of trips, and amount for each trip. Identify point of origin and destination.

Other Direct Costs

Lines have been provided for typical other direct costs such as communications, other line items may be added if needed.

Equipment

Provide the explanation for the need for equipment in the Budget Narrative.

Sub-agreements

Provide a detailed supporting budget for any sub-agreement costs appearing in the "sub-agreement" line item.

COST PROPOSAL SECTION D: BUDGET NARRATIVE

Provide a budget narrative as Section D of the cost proposal. Describe the major assumptions.

Salaries and Benefits:

For management staff, especially at the head office level, state the percentage of time that will be dedicated to the project.

The cost of any benefits for staff should be fully explained -- type, basis of calculation, etc. A breakdown of what is included must be supplied in the budget narrative if you use a percentage rate for benefits.

Consultants

Provide a brief description of the statement of work.

Explain how you arrived at the consultant rate (should be determined using the individual's rate history)

Travel

Explain why travel is being budgeted

Describe per diem policy

Other Direct Costs

Explain how estimations and/or calculations were made for each sub-line item under ODCs.

Equipment

Provide a justification of the equipment needed

Subrecipients

Provide financial information, budget, and budget narrative following this proposal's format and requirements.

Other Source of Funds

Provide information about any other source of funds to the program, including other donor contributions, government funds, community contributions and private sector contributions.