

REQUEST FOR PROPOSALS (RFP)

RFP Number: CRED_24

Issuance Date: September 30, 2020

Closing/Submission Date: October 14, 2020

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

Table of Contents

1	SECTION A: REQUEST FOR PROPOSALS (RFP) OVERVIEW.....	2
2	SECTION B: DESCRIPTION OF SERVICES/GOODS.....	3
3	SECTION C: PROPOSAL AND AWARD PROCESS	5
4	SECTION D: EVALUATION CRITERIA	7
5	SECTION E: PROPOSAL OUTLINE AND GUIDANCE.....	8

1 SECTION A: REQUEST FOR PROPOSALS (RFP) OVERVIEW

RFP No: CRED_24

RFP Title: Learning Event Planning Committee

RFP Issued By: US Overseas Cooperative Development Council (OCDC), implemented by OCDC's Research Group, funded by the United States Agency for International Development (USAID)

Issuance Date: September 30, 2020

Closing/Submission Date and Time: October 14, 2020.

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 close of business on the closing date specified in this RFP. See Section E of the RFP for detailed delivery instructions.

Estimated Period of Performance: The estimated period of performance is October 15, 2020 – December 31, 2020.

Contract: A Fixed Price Contract is anticipated. Issuance of this request for proposal does not constitute a contract commitment on the part of OCDC. OCDC reserves the right to make one, more than one or no contract 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.

2 SECTION B: DESCRIPTION OF SERVICES/GOODS

Scope of Work

Background

The US Overseas Development Council (OCDC) is a member association of cooperative development organizations (CDOs) working internationally, principally on the Cooperative Development Program (CDP) in USAID-assisted countries. The International Cooperative Research Group (ICRG) is a division of OCDC and serves as a learning center for the CDOs and an innovative research institution. The ICRG performs research, education and dissemination activities to strengthen their programming and international cooperative development globally. The ICRG carries out original, solution-oriented research and supports the members of the OCDC through designing and executing on cooperative development programming that strengthens governance, leadership, gender empowerment, youth engagement, financial management, market performance, and advocacy.

Overview

This is the third Annual Learning Event whose primary audience is Cooperative Development Program (CDP) Managers and includes other experts, USAID and field staff. At the first meeting, managers identified three areas to increase skills: training within CDP implementations, partnership development and strong cooperative development. The ICRG intends to host the Learning Event remotely due to COVID-19. While previous years saw the in-person event last 2 full days, as we pivot to a virtual format the ICRG anticipates a less dense and longer time frame in which the event will occur. We envision 2-hour modules that allow for participation without overwhelming the user on a long remote call.

Objectives and Major Tasks

Drawing on the experience of the in-person events previously held and best practice with similar remote learning events, the primary purpose of these sessions is to help CDP managers engage deeply with specific concepts still to be determined, while reflecting on the impact of COVID 19. They will draw on lessons learned from implementation as well as input from external experts. OCDC is seeking qualified consultants or organizations to work on a planning committee with the ICRG on the design of the curriculum for the Learning Event.

The committee will include **two roles**, a role for technological support and design, and a role for a learning facilitator operating as the event's Master of Ceremonies. **Please indicate which role your proposal is seeking when submitting.** The committee will cooperatively ensure that the execution of the remote event experience that is content rich, meaningful, wieldy, and participatory. This RFP intends to build a planning committee of facilitation and remote event experts to plan and execute a successful learning event in close collaboration with the ICRG.

The objectives and major tasks for the planning committee will collectively be:

- Provide content and design of a suite of interactive training and learning sessions for approximately 30 CDP managers and cooperative implementers and experts, and
- provide facilitation during the International Cooperative Research Group's Annual Cooperative Development Learning Event (December 2020)

Deliverable Overview

These sessions should be based on existing research, case studies, and other training sources. Required deliverables which will be designed in a collaborative fashion with the ICRG planning committee are outlined below:

- 1. Session Outlines:** A session outline, objectives and methods should be co-created and discussed with the Research Group for each topic/day. The sessions should be interactive, innovative, and prioritize deeper discussion. The curriculum should reflect the opportunity for small groups to work together during and possibly in the lead up to the Learning Event itself. Provide support to the RG in obtaining input from the CDO participants into the design and content.
- 2. Event Management Plan:** Includes assistance with the registration of participants, providing direction for use of ICRG’s remote platform (BlueJeans), the facilitation of some training modules (with coordination from ICRG event facilitators), note taking, etc.
- 3. Facilitate and manage the virtual learning event;** working with the RG. Ensure that a feedback loop is included during the course of the Learning Event.
- 4. Provide the RG with a report:** suggesting next steps, reflecting on the Event and its various sessions and through a final evaluation survey or similar approach maximizing the RG’s own learning from the event. Reports should be individually drafted by each participating entity of the planning committee (one from the technology expert and one from the master of ceremonies).

Period of performance:

CDP Learning Event will be held from December 9-11, 2020. Work under this SoW will carry from October 16 to December 31.

Financial Provisions:

Date	Payment	Payment Amount	Deliverables Required
11/15/20	Progress Payment contingent on approval of drafts	1/2 the agreed cost	Upon completion and acceptance of the first complete draft of deliverables 1 and 2.
12/31/20	Final payment	½ the agreed cost	Upon completion of successful learning event and receipt of Final reports
	Total		

Proposal Requirements:

Please send proposals to researchgroup@ocdc.coop by **Thursday, October 14, at 5pm EST.**

- Summary of session including:
 - Description of proposed planning approach
 - Outline of activities and concepts of engaging sessions
 - Proposed timeline for sessions (Two 2-hour sessions per day, One 2-hour session over more days, etc.)
 - Facilitation services for the event
- Resume & Recent Sessions Led
- Portfolio References
- Proposed cost including Proposed LOE (preparation hours plus session)

3 SECTION C: PROPOSAL AND AWARD PROCESS

WHO CAN SUBMIT PROPOSALS?

This RFP is a locally sourced procurement open to US based organizations and any domestic or international individual. All work performed under this award will be in English.

- Individuals
- Non-profit entities
- For-profit entities

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.

Questions Regarding the RFP

Questions may be submitted to the ICRG via email (researchgroup@ocdc.coop) by COB October 7, 2020. All answers to any questions asked will then be posted to the listing page of the RFP by COB October 9, 2020. All parties who have registered interest with the ICRG will be notified of their posting.

AMENDMENTS TO THE RFP

Amendments to the RFP will be issued in writing to all parties who have registered their interest with the ICRG.

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

Any parties who have contacted the ICRG in writing to receive a copy of the RFP 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.

Offerors can expect to be notified of decisions on or about October 16, 2020. Awards will be contingent on obtaining USAID approval, if required. Activities are expected to begin around October 19, 2020 pending successful completion of negotiations, the results of the pre-award survey, and the checking of references.

WHAT TYPE OF AWARD WILL BE MADE?

A fixed price contract will be made.

OCDC will not provide any supplies or equipment to the contractor. The Offeror should include any necessary supplies 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 CONSULTANT 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 – please contact the Research Group (researchgroup@ocdc.coop) to verify whether your joint venture is eligible for award before submitting an proposal. OCDC may also award the work to two different entities if necessary to meet the technical requirements.

A subcontract occurs when the contractor contracts part of the work to another entity. A contractor can be included in the proposal so long as the work being done by each entity is clearly defined in the proposal.

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 A CONTRACT?

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 contract 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 contract is issued using the Office of Foreign Assets Control (OFAC) Specially Designated Nationals and Blocked Persons List.

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: 40	
Approach to learning and/or facilitation of sessions, which demonstrate dynamic, engaging, and thoughtful principals	(Maximum Possible Points) 20
Proposed timeline is reasonable and falls within the general timeline presented in the RFP.	(Maximum Possible Points) 10
Past performance: Previous qualified experience implementing similar designs for other works of research including work samples.	(Maximum Possible Points) 10
B. Cost Breakdowns Maximum Possible Points: 10	
Reasonableness of proposed budget based on scope of design and experience with manual design. Summary budget, detailed budget, and budget notes included.	(Maximum Possible Points) 10
Maximum Technical Score:	50

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 4 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. 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 1 page)
Section 2: Experience (last three years) & work samples	(limit of 1 page)
Section 3: Proposed Approach	(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: Proposed Timeline	

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; 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 Subcontracts, 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: Proposed Timeline

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 contract)</i>	Telephone: Email (at least two): Website:
Type of Entity: (check one) <input type="checkbox"/> Non Profit <input type="checkbox"/> For Profit <input type="checkbox"/> Other (specify)	Year and state where incorporated if applicable

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 Subcontract, 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

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 1 page)

Description of Proposed Approach

Describe your technical approach for providing the services described in Section B of this RFP.

For each type of service, describe which individual will be providing the service.

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]

Name of Organization:	Primary Address:
Contact Name: <i>(This must be an individual with the authority to negotiate and enter into a contract)</i>	Telephone: Email (at least two): Website:
DUNS Number: <i>A DUNS number will be required for this contract if not an individual consultant.</i>	
Type of Entity: <i>(check one)</i> <input type="checkbox"/> Non Profit <input type="checkbox"/> For Profit <input type="checkbox"/> Other (specify)	Year registered in USA:

Authorized Signatory: _____

Name and Title: _____

Date: _____

COST PROPOSAL SECTION C: BUDGET GUIDANCE

General

A Budget Template, in an excel document, 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 contract.

List all positions on separate lines on the budget.

Consultants

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

.

Other Direct Costs

Lines have been provided for typical other direct costs such as communications.

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)

Other Direct Costs

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