



U.S. Overseas  
Cooperative  
Development  
Council



## REQUEST FOR PROPOSALS (RFP)

**RFP Number:** CRED\_033

**Issuance Date:** Thursday, August 26, 2021

**Closing/Submission Date:** Friday, September 17, 2021, 5 PM EST

**Submission Location:** U.S. Overseas Cooperative Development Council  
Research Group  
[researchgroup@ocdc.coop](mailto:researchgroup@ocdc.coop)

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# 1 SECTION A: REQUEST FOR PROPOSALS (RFP) OVERVIEW

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**RFP No:** CRED\_033

**RFP Title:** OCDC/ICRG website user experience and user interface

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

**Issuance Date:** Tuesday, August 26, 2021

**Registration for Information:** To ensure you receive any modifications to the RFP, send an email to [researchgroup@ocdc.coop](mailto: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](mailto:researchgroup@ocdc.coop) no later than Monday, September 6, 2021, at 5:00 EST. OCDC will send answers to questions to all registered parties by Friday, September 10, 2021, at 5:00 EST.

**Closing/Submission Date and Time:** Friday, September 17, 2021, at 5 pm 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](mailto: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 for the two tasks outlined in this RFP is September 22, 2021, and be concluded December 17, 2021. In the event that OCDC exercises the option to execute the plan recommended by the successful bidder, the period of performance and budget would be separately negotiated at that time.

**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 Offeror should propose a budget to carry out Task 1 and Task 2.

## 2 SECTION B: DESCRIPTION OF SERVICES/GOODS

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### *Overview*

International Cooperative Research Group (ICRG) of the US Overseas Cooperative Development Council (OCDC) carries out research on the effectiveness and other aspects of cooperative development. One of the pillars of activity under our current USAID award – CRED – involves dissemination of research, tools, and learnings related to international cooperative development. The main point of dissemination for these materials is our website: [ocdc.coop](http://ocdc.coop). The ICRG is seeking a qualified UX/UI expert or company to perform a sitewide audit, with close attention to site framework, ease of navigation, and content and design knowledge sorting, and make actionable recommendations to OCDC/ICRG. OCDC reserves the right to exercise an option for the successful bidder to execute the recommendations. If OCDC exercises this option the parties will negotiate the terms, including budget, at that time.

All meetings and coordination for Task 1 and Task 2 described in this RFP project will be done remotely over Zoom.

### *Background:*

The OCDC/ICRG website was designed to create a compelling and interactive space to which researchers and practitioners, donors and policymakers, refer in order to access a wide range of resources and knowledge (original and secondary) with respect to the field of international cooperative development. This makes the website primarily a **knowledge management platform this RFP is requesting an analysis and recommendations about its effectiveness in this regard.**

The analysis is to include a hierarchy of the website addresses and resolves competing priorities including user experience, interface, ease of access, intuitive site direction and sorting, member-specific and public access, among other items. This hierarchy should mutually reinforce knowledge by providing related content, directing the user to relevant content, and providing intuitive sorting of knowledge and knowledge products to facilitate simple and direct access to desired material. The site also utilizes inbound marketing techniques to empower the audience to find the most similar or related content to what they are currently perusing. However, we have noted that these may need to be optimized.

**Task 1:** perform a site-wide audit of all site hierarchy and design, with special attention to a user perspective, on all elements including the framework, navigation ease, and content and design knowledge sorting in both the front and back end of the website. It is expected that the user perspective will be gained by this analysis and through interviews with frequent users including our partners, staff, and members.

**Task 2:** deliver a report with web-flow and site architecture diagrams, as well as providing actionable steps that can be taken to improve on the above concepts, including any additional concepts that may come up through the course of work and discussion about the website. This report should be actionable.

OCDC reserves the right to exercise an option for additional work to carry out the report findings. A successful bidder for Task 1 and Task 2 would execute the plan if approved by OCDC and agreement reached on budget and methods.

***Period of performance:***

Work on this activity is expected to begin on September 24, 2021, and be concluded on or by November 19, 2021.

***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 deliverable-based payment schedule will be used.

<b><u>Deliverable/Task</u></b>	<b><u>Due Date</u></b>
<b>Inception meeting with OCDC website advisory group</b>	September 24, 2021
<b>(3) Interview reports demonstrating user preference and current understanding of website</b>	October 20, 2021
<b>Final debrief and report on actionable steps referring to Tasks 1 and 2 focused on user experience and interface.</b>	December 8, 2021

This agreement may be extended by mutual agreement in writing.

### **3 SECTION C: PROPOSAL AND AWARD PROCESS**

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#### **WHO CAN SUBMIT PROPOSALS?**

This RFP is open to the public, including:

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

#### **HOW TO SUBMIT A 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 Friday, September 3, 2021, at 5:00 EST to [researchgroup@ocdc.coop](mailto:researchgroup@ocdc.coop). Telephone inquiries will not be accepted. Answers to questions will be sent out to all registered parties and answered by 5 pm on Wednesday, September 8, 2021.

#### **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](mailto: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 September 22, 2021. Activities are expected to begin around September 24, 2021, pending successful completion of negotiations, the results of the pre- award survey, and the checking of references.

The estimated period of performance is September 24 – December 17, 2021.

### **WHAT TYPE OF AWARD WILL BE MADE?**

A fixed price contract will be issued.

OCDC will not provide any supplies or equipment. 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 OCDC/ICRG will evaluate proposals. The Selection Committee will use the evaluation criteria in Section D of the RFP on which to base a selection.

### **WHAT ARE THE MINIMUM ELIGIBILITY REQUIREMENTS FOR A PROPOSAL?**

The following requirements must 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 for Task 1 and Task 2

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

OCDC does not envision a joint venture bidding on this RFP and expects that all work will be handled by bidder without additional subrecipients.

### **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 ICRG 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
<b>A. Technical</b>	
<b>Maximum Possible Points: 60</b>	
Comprehensiveness of proposal approach. Clarity and appropriateness of proposed activity. Understanding of user experience optimization task and ways to improve/add value to the website.  Knowledge of WordPress, HTML, CSS, and JavaScript would be an added benefit. Responsive design e.g. Mobile first. Knowledge of improving website performance.	(Maximum Possible Points) 30
<b>Past performance:</b> Previous successful experience implementing similar deliverables.	(Maximum Possible Points) 20
<b>B. Cost Breakdowns</b>	
<b>Maximum Possible Points: 20</b>	
Reasonableness of proposed budget based on scope of activities proposed. Summary budget, detailed budget, and budget notes included.	(Maximum Possible Points) 20
<b>C. Personnel &amp; Management</b>	
<b>Maximum Possible Points: 20</b>	
Key personnel have appropriate level of qualification and experience to lead and to implement project.	(Maximum Possible Points) 30
<b>Maximum Technical Score:</b>	<b>100</b>

## 5 SECTION E: PROPOSAL OUTLINE AND GUIDANCE

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### 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](mailto: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 8 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.

<b>Technical Proposal Checklist</b>	
Section 1: Cover Page	(limit of one page)
Section 2: Experience/Past Performance (last three years)	(limit of 2 pages)
Section 3: Proposed Approach to audit	(limit of 3 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 <a href="https://goo.gl/BwhGua">https://goo.gl/BwhGua</a> ; 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]*

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

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

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### **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.

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. Site-wide audit plan for the website's hierarchy and design, with special attention to strategies to obtain user perspective, on all elements including the framework, navigation ease, and knowledge sorting in both the front and backend of the website.
2. Deliver a report based on audit conclusions and recommend with actionable steps that can be taken to improve on the above concepts, including any additional that may come up through the course of work and discussion about the website.

## **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.

### **Description of Proposed Key Management Positions:**

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

<b>Title</b>	<b>Name (or “vacant”)</b>	<b>Program responsibility</b>	<b>Who will they supervise?</b>

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

How will staff be supervised and by whom?

### **Commitment letters of availability by Key Personnel**

Please include brief signed letters of commitment from each key personnel expressing interest and availability to perform the work specified during the period of performance from September 24 – December 17, 2021.

### **Subrecipients**

It is expected that consultant/firm will implement all work under the contract and not subaward portions to a third party.

### **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 contract. 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 ODCD 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><b>Name of Organization:</b></p>	<p><b>Primary Address:</b></p>
<p><b>Contact Name:</b></p> <p><i>(This must be an individual with the authority to negotiate and enter into a contract)</i></p>	<p><b>Telephone:</b></p> <p><b>Email (at least two):</b></p> <p><b>Website:</b></p>
<p><b>DUNS Number:</b></p> <p><i>A DUNS number will be required for this award unless bidder is an individual other than a sole proprietor (<a href="https://fedgov.dnb.com/webform">https://fedgov.dnb.com/webform</a>).</i></p>	
<p><b>Type of Entity: (check one)</b></p> <p>Non Profit</p> <p>For Profit</p> <p>Individual</p> <p>Other (specify)</p>	<p><b>Year registered:</b></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.

## **COST PROPOSAL SECTION D: BUDGET NARRATIVE**

Provide a budget narrative as Section D of the cost proposal. Describe the major assumptions. Please include as relevant:

### **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.