



U.S. Overseas  
Cooperative  
Development  
Council



## REQUEST FOR PROPOSALS (RFP)

**RFP Number:**

CRED\_034

**Issuance Date:**

**Friday, September 10, 2021**

**Closing/Submission Date:**

**Friday, October 1, 2021, 5 PM EST**

**Submission Location:**

**U.S. Overseas Cooperative Development Council**  
International Cooperative 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\_34

**RFP Title:** WDDCM For Migration: Northern Triangle

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

**Issuance Date:** Friday, September 10, 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.

## **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 Wednesday, September 22, 2021, at 5:00 pm EST. Answers to questions will be sent out to all registered parties and answered by 5 pm on Friday, September 24, 2021.

**Closing/Submission Date and Time:** Friday, October 1, 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 is from October 11, 2021 to February 28, 2022.

**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 after reviewing Task 1 and Task 2 to that is in line with current market rate.

## 2 SECTION B: DESCRIPTION OF SERVICES/GOODS

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### **Overview**

*This Scope of Work details research in the Northern Triangle countries (Guatemala, Honduras & El Salvador) gathering data systematically and carrying out analysis of the results. Tasks include, but are not limited to, the following: Macro-economic data acquisition, field sampling, instrument modifications (based on standard instruments provided), data collection through surveys, focus groups, key informant interviews, regression and statistical analysis, qualitative data analysis, report-writing. The period for the performance is 11 October 2021 – 28 February 2022.*

### **Background**

The International Cooperative Research Group (Research Group) of the US Overseas Cooperative Development Council (OCDC) has embarked on an original research project focusing on the Northern Triangle (NT) countries of El Salvador, Guatemala, and Honduras. The NT Central American countries experience consistently high rates of migratory outflows, with an estimated 311,000 people migrating, on average, annually from FY2014 to FY2020.<sup>1</sup> Given that a number of previous studies find that a lack of economic opportunity in communities of origin is a key *push* factor for migration, and informed by the results of the global “What Difference do Cooperatives Make?” study demonstrating the positive economic and social impacts of cooperative enterprises in low- and middle-income countries<sup>2</sup>, this study will investigate the potential impacts of cooperative enterprises to mitigate high migratory outflows from the Northern Triangle region.

“What Difference Do Cooperatives Make for Migration” (WDDCMM)<sup>3</sup> takes the form of an empirical, mixed methods study that will examine the role, if any, that cooperatives play in mitigating the adverse circumstances (*push* factors) associated with migratory flows out of the Northern Triangle, by strengthening the positive circumstances (*stay* factors) associated with lower rates of migration. The study should provide actionable findings on the potential for cooperatives to mitigate migratory flows out of the Northern Triangle countries.

The successful offeror will implement and test the methodology and then gather and analyze the data. The technical proposal and timeline should account for the distinct research permitting processes that must be followed in the three countries of the study. This Scope of Work addresses the design and implementation of the research in the three countries of *El Salvador, Guatemala, and Honduras*. Firms should have right to work in the three countries of the study.

**Definition of Terms:** For the purposes of this research, a **cooperative** is an institution that upholds the international cooperative principles<sup>4</sup> and holds legal status as a cooperative in its country of operation.

### **Methodology and Research Questions**

The study will collect both quantitative and qualitative primary data from a scientifically drawn sample of cooperative members and a comparison group of non-members to understand the impact of cooperative membership on perceptions about migration, as well as the role that cooperatives might play in strengthening the *stay* factors which have been selected for analysis.

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<sup>1</sup> Congressional Research Service. April 2021. Central American Migration: Root Causes and U.S. Policy. Accessed online at: <https://fas.org/sgp/crs/row/IF11151.pdf>

<sup>2</sup> The WDDCM Global Outcomes report is accessible here: <https://ocdc.coop/resource/what-difference-do-cooperatives-make-global-outcomes-report/>.

<sup>3</sup> The WDDCMM research project builds on the proven methodology of the global research study, “What Difference do Cooperatives Make?” (WDDCM), which measured the impact of cooperatives on social and economic wellbeing of individuals and communities across four countries: Philippines, Kenya, Poland, and Peru.

<sup>4</sup> See more here: <https://www.ica.coop/en/cooperatives/cooperative-identity>

**The key research questions are as follows:**

1. What is the impact of cooperative membership on the perceived appeal of migration?
2. What difference are cooperatives making in the lives of their members and in the larger communities in which they operate?
3. How do cooperative members differ from non-members in terms of *stay* factors such as economic status, social capital, and perceptions about migration?

The sample frame will consist of cooperative members and nonmembers throughout Guatemala, El Salvador, and Honduras. A random sample should be selected to represent both cooperative members and non-members that spans the spectrum of diverse geographies, cultures, locality types (urban/rural), and cooperative types found in each country. Non-members and cooperative members should be sampled in such a way as to ensure similar variance within each group in terms of demographics, or appropriate statistical methods should be used to adjust for differences. The sample size should be determined using appropriate methodologies to ascertain statistical robustness and power, as well as generalizability of the findings.

Participants will be surveyed through standard questionnaires to reflect demographic information, perceptions about migration – specifically the degree to which the idea of migrating appeals to them, perceptions about and experience with cooperatives (for members only), and about life opportunities and well-being as defined by the study’s *stay* variables. The WDDCMM questionnaire will be designed to analyze the relationship between cooperative membership and perceived appeal of migration, as well as migration *push* and *stay* factors as identified in the literature. Both quantitative and qualitative data will be collected via the survey instrument and the survey questions will correspond to various *stay* factors. Cooperative members will be asked additional questions about their perceptions of and experiences with cooperatives.

**Regression analysis** will be conducted to understand the impact of cooperative membership on perceived appeal of migration (measured using a Likert scale), as well as perceived appeal of undocumented migration. The regression model should include the following key independent variables: cooperative membership, social capital (perceived trust of others and the ability to rely on neighbors in times of trouble), annual income, and whether or not participants currently have a relative based in the U.S., controlling for demographic variables such as age, sex, locality type, region, etc.

**Descriptive statistics** will be carried out on member and non-member groups to compare them in terms of both quantitative and qualitative data regarding perceived appeal of migration, economic profile of household, and social capital. Summary statistics should also describe cooperative members’ perceptions about cooperatives and experiences pertaining to *push* and *stay* factors outlined in the table below.

**Qualitative responses** to open-ended questions will be analyzed using inductive coding for themes and patterns and any differences between member and non-member responses should be noted. Emergent themes will be summarized in terms of their relevance to the main study questions regarding cooperatives, push and stay factors affecting life opportunities, and migration.

| Variables of Study   | Questionnaire Section |
|--|-----------------------|
| Perceived appeal of migration<br>[1= Not at all appealing;<br>2 = Somewhat appealing;<br>3 = Very appealing] | h. Migration          |
| Perceived appeal of<br>undocumented migration  | h. Migration          |

|   |   |   |
|---|---|---|
|   |   |   |
| Cooperative Membership<br><b>(“Stay” Factors)</b> | <b>“Push” Factors</b>                   | c. Cooperative Membership   |
| Financial Security                                | Poverty                                 | b. Economic Profile of Household<br>d. Motivations to join and impact of membership |
| Gender Inclusiveness                              | FHH/ Women poverty                      | e. Gender Inclusivity   |
| Opportunities/Education for youth                 | Lack of opportunities for youth         | f. Program and Services   |
| Social networks in community of origin            | Social networks in destination location | g. Social Capital and Trust   |

Focus group discussions may be held to lend additional insight into the key research questions if permissible and deemed safe in the countries of the study, as informed by local laws, and agreed upon by the ICRG. The Offeror will ethically coordinate with research participants using all due precautions in the era of the global COVID-19 pandemic and observant of local laws and ordinances.

The Offeror will create a sampling plan to identify cooperatives, regions, and individuals to be included in the research to ensure that the results are representative and align with the research methodology provided. In the analysis, the International Cooperative Research Group wishes to be able to compare for the appropriate questions the responses of cooperative members and non-members. Data should be well-organized, presented in a machine-readable format, and analyses should be disaggregated by gender and geography. If a specific demographic qualifier skews the overall responses, the ICRG wishes to understand these dynamics.

***Period of performance:***

Work under this Scope of Work will start in October 2021 and deliverables will be completed by February 28, 2022. See below for timeline related to specific deliverables.

***Proposal Requirements***

1. The technical proposal should include a detailed explanation of the offeror’s approach to the implementation of the provided research methodology. The ICRG will provide the full survey instrument (questionnaire) to the successful bidder. The technical proposal should include a proposal of data collection method(s), including, but not limited to, the following: plan for reaching participants, mode of communication, and method of recording data. Note: Detail strategy to ensure representativeness.
2. Include a **strategy for sampling** for the general population (specifically non-cooperative members) and cooperative members, representing each sector, in ***Honduras, Guatemala and El Salvador***.

The sampling strategy included in the proposal 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 (see methodology section for recommendations). It should also stipulate the required documentation of procedures carried out during the sampling process. The sampling strategy will be discussed, revised if necessary, and a finalized **sampling plan** will be submitted during the early stages of the work.

3. Include an **implementation plan** which maintains congruence among the three countries sampled, but takes into consideration any cultural, linguistic, or operational adaptations for ***Honduras, Guatemala, and El Salvador***. 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 numbers<sup>5</sup> necessary for significant 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 International Cooperative Research Group is to address the research questions in a concise fashion within the available financial resources and timeframe. The comprehensive research methodology from the ICRG will provide guidance on the analysis of the data along the analytical framework of the research project.

The implementation plan should include:

1. 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. The instruments will be shared with the winning contract.
2. **Approach to test for reliability and validate** all the instruments on a small group of respondents for cultural and linguistic 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 Northern Triangle countries*.
3. **Approach to Conduct** surveys, key informant interviews, and focus groups, observing an internationally recognized code of ethical research standards.

#### **Approach and Considerations to Prepare data.**

**Task 1:** OCDC expects that quantitative survey data will be presented in both machine-readable and formatted Excel files.

OCDC will have full access to the complete data set. The data set must be submitted in English. If you will work with the dataset in Spanish, we require the Spanish and English versions of the dataset for verification purposes. 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.

**Task 2:** Qualitative responses from open ended questions in the survey, and potential 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.

#### **Approach to Analyze results.**

##### i. **Task 1:** Quantitative Results

(1) Preliminary quantitative analysis and report. OCDC expects the analysis to include:

- (a) Regression analysis

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<sup>5</sup> The WDDCM study used a sample of approximately 1,000 cooperative members and 1,000 non-cooperative members per country. If a smaller number is proposed, please include justification including ability to maintain statistical significance.

- (b) Descriptive statistics
  - (c) Response frequencies for all survey questions
  - (d) Statistical results for all survey questions
- (2) OCDC will review and discuss the preliminary results with the Offeror thus determining any additional statistical analysis to be completed
  - (3) Final analysis which incorporates OCDC feedback

**Final report on quantitative results:** The final analysis will be presented in the final report.

**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

**Final report on qualitative results:** The final analysis will be presented in the final report.

The reports from task 1 and 2 can be combined or standalone, granted that they both fulfill the necessary technical requirements.

**Proposed Deliverable Schedule:**

The estimated schedule for performance 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>Deadline</u>            |
|---|----------------------------|
| <b>Inception report</b>   | <b>October 18, 2021</b>    |
| Pilot test questionnaire in each country                              | October 25, 2021           |
| Adapted questionnaire submitted for each country and OCDC feedback    | November 1, 2021           |
| Final Survey Instruments Submitted to OCDC for each country (3 total) | November 5, 2021           |
| <b>Conduct Research</b>   | <b>Nov 9 – Dec 9, 2021</b> |
| <b>Descriptive Report &amp; Data Set Submitted</b>                    | <b>December 20, 2021</b>   |
| <b>Summary Brief on Initial Findings</b>                              |                            |
| Draft #1 of comprehensive research report and analysis submitted      | January 17                 |
| ICRG response to Draft Report   | January 21                 |
| <b>Final Report Submitted</b>   | <b>February 7, 2022</b>    |

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
- Universities
- 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 Wednesday, September 22, 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 Friday, September 24, 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.

The selection process will take place on or around October 6, 2021 and Offerors can expect to be notified of decisions on or about October 8, 2021. Awards will be contingent on obtaining USAID approval, if required. Activities are expected to begin around October 11, 2021 pending successful completion of negotiations, the results of the pre-award survey, and the checking of references.

The estimated period of performance is October 11, 2021 – February 28, 2022.

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

A fixed price contract will be made.

OCDC will not provide any supplies or equipment to the Recipient. 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?**

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 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         |
|---|---------------------------------|
| <b>A. Technical</b>   |                                 |
| <b>Maximum Possible Points: 65</b>  |                                 |
| 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)<br>50 |
| Past performance: Previous successful experience implementing similar research activities.  | (Maximum Possible Points)<br>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)<br>15 |
| <b>C. Personnel &amp; Management</b>  |                                 |
| <b>Maximum Possible Points: 15</b>  |                                 |
| Key personnel have appropriate level of qualification and experience to lead and to implement project.  | (Maximum Possible Points)<br>15 |
| <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 including references (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                                     |                     |

Attachment C: Organizational Capabilities Statement

## 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
  - Attachment C: Organizational Capabilities Statement

**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><br><br><i>(This must be an individual with the authority to negotiate and enter into a contract)</i> | <b>Telephone:</b><br><b>Email (at least two):</b><br><b>Website:</b> |
| <b>Type of Entity:</b> <i>(check one)</i><br><br>Non Profit<br>For Profit<br>Other (specify)<br>Individual                | <b>Year registered:</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<br>(Name and Title) | Organization | Telephone and<br>email | Services and Dates<br>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. Note: Survey and other data collection instruments will be provided by the RG for appropriate adaptation to the context in *El Salvador, Guatemala, and Honduras*.

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.

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

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

| <b>Title</b> | <b>Name<br/>(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?

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 brief signed letters of commitment from each key personnel expressing interest and availability to perform the work specified during the period of performance is October 11, 2021 – February 28, 2022.

### **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 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><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 with the 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.

### **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

### **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.