REQUEST FOR PROPOSALS (RFP)

RFP Number: CRED_35

Issuance Date: **Thursday, September 16, 2021**

Closing/Submission Date: **Friday, October 29, 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: CRED_35

RFP Title: CRED Midterm Evaluation Study

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) 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: Thursday, September 16, 2021.

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.

Submission of Questions regarding the RFP: Questions regarding the RFP should be submitted in writing to researchgroup@ocdc.coop no later than October 22, 2021 at 5:00pm EST. OCDC will send answers to questions to all registered parties by October 26 at 5:00pm EST.

Closing/Submission Date and Time: Friday, October 29 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 November 8, 2021 – January 31, 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.

2 SECTION B: DESCRIPTION OF SERVICES/GOODS

Background Information

Cooperative Research, Education, and Dissemination (CRED) is a project implemented by the U.S. Overseas Cooperative Development Council (OCDC)'s International Cooperative Research Group (ICRG) under USAID's Cooperative Development Program (CDP), located in the Bureau for Development, Democracy and Innovation (DDI)'s Local, Faith and Transformative Partnerships Hub (LFT). OCDC's mission of championing, advocating, and promoting effective international cooperative development around the world brings together nine member organizations from diverse sectors and geographies to collaborate and work together on designing and executing valuable research projects to inform cooperative development.

ICRG conducts original, independent, academically rigorous research and disseminates data-driven results to increase the impact of cooperative development, as well as to increase its uptake to foster broad-based, inclusive growth in USAID-assisted countries. ICRG's research is both policy-focused and practice-focused and is characterized by engagement with stakeholders throughout its process and targeted dissemination approaches, including tools that facilitate the application of its outcomes. CRED research has two main goals: 1) Providing action-oriented evidence to inform policymakers in USAID-assisted countries, in donor agencies, and other organizations to increase the uptake of cooperative development as a strategy for fostering inclusive growth; and 2) Improving program design and implementation by Cooperative Development Organizations (CDOs) and other implementers, thus increasing impact of on-the-ground activities.

Through its three mutually reinforcing program components, CRED also supports the development of ICRG as a Center of Excellence for International Cooperative Development Research by: 1) Collecting robust new evidence and developing data-driven solutions for internal and external challenges faced by cooperatives, both locally and nationally; 2) Working with OCDC members to design, adopt, share, and apply field-derived learning through a shared learning agenda; and 3) Disseminating key research findings deeply and widely, in both "practice friendly" and "policy friendly" formats, to inform local and international strategies to increase the uptake of cooperative development.

This research and its dissemination help to stimulate a robust learning community that enriches cooperative development programming, facilitates learning exchanges, and contributes to the development of functional tools to promote more effective cooperative development. A central goal of the CRED program is to build a robust learning community that will enrich participants' cooperative development programming and enhance their impact. The evidence is intentionally disseminated to bridge the findings to action, including through strengthened program design.

We have also found that research generated evidence when used as an engagement strategy can provide a platform through which to highlight the potential of cooperatives in USAID-assisted countries. This platform can be strengthened through the lens of CDP APS Pillars, such as the enabling environment, improved business performance, and development of community support.

The CRED Pillars

CRED is organized around three pillars: Research, Education/Learning, and Dissemination. CRED carries out work within each of these three pillars in a mutually reinforcing manner to meet the goals of the project.

Research is conducted internationally in various countries and regions to produce actionable, academically rigorous findings that push policy into practice. Previous studies include the multi-year, multi-region, cross-sector study; "*What Difference do Cooperatives Make?*". This study interrogated the economic and social benefits that cooperatives claim to have on communities worldwide. The findings were encouraging, and the ICRG intends to leverage this pivotal moment to spring into deeper, more international research to target best practices for international cooperative development and further inform the Education pillar of CRED.

Education/Learning operates as a service pillar – providing intrinsically valuable trainings to OCDC member CDOs to foster best practice in project implementation and management. These trainings include services for field and headquarters staff and produce usable tools stemming from both the research and after-action reports of organized trainings.

Dissemination serves as the primary exit point for both research reports and CRED created tools and resources. The primary function of this pillar is to expand the cooperative development practice worldwide while invoking evidence and proven tools to elucidate the value of the model. This is primarily performed on the OCDC website and through attendance at international conferences and events.

Significant Disruptions

As has been true for many other organizations, COVID-19 disrupted some of our plans. However, by its nature as a research-based award, CRED is fortunate in having had some inherent flexibility that allowed it to pivot and adjust to the changing situation. For example, the ICRG was able to move quite efficiently from in-person conferences and trainings to remote programming conducted primarily over Zoom; it was also able to help CDOs to address some of the challenges that they were facing in making a similar pivot. Since some of the ICRG research activities had already completed field work, analysis and subsequent publication and dissemination were not significantly affected. In some cases, data collection was slightly hampered with limited field movements. However, it is important to note that this pandemic did create unforeseen obstacles in the third year of implementation – limiting initiation of new field-based research, curtailing planned action research projects, and requiring re-thinking of certain dissemination strategies. The largest impact in programming has been related to field data collection and dissemination of findings back to local stakeholders. Thus, CRED has been extended to a sixth year and the ICRG looks forward to creating further impact during this additional time.

Evaluation Rationale

Purpose

The ICRG is seeking a midterm evaluation to create and utilize significant leverage from recently completed flagship research and continue an upward trajectory toward our program outputs. We are accepting proposals from either a firm or an individual - seeking a contractor who will work in partnership with the ICRG team. CRED differs in its nature from a traditional field level project – even one that might be focused on policy change. Therefore, we are seeking a mid-term evaluation that will help the ICRG to develop a range of strategic options to heighten its effectiveness under each of its pillars.

CRED is deemed successful when the uptake of our work increases to deepen and improve the impact of cooperative development. To further define this success, each CRED pillar can be examined individually. The research pillar is successful when research is produced with academic rigor and the resulting reports lead to practical applications for cooperative development or local policy. The education pillar is

successful when our learning community (Collaborative Group or CG) is vibrant and active, and when the tools produced are actively used in programming by other implementers. The dissemination pillar is successful when new organizations take up the findings of our research or the tools and trainings from our education, when new partnerships are brought into the fold, and when our research findings are influencing the broader cooperative development conversation.

We believe that CRED has achieved success in each of these areas and we are seeking to understand how to leverage this success and/or employ additional strategies that can add to it.

Intended Audience and Uses

The primary audience for the findings of this midterm evaluation is the ICRG itself. We are seeking to understand how we can better track and understand our impact over time as knowledge becomes evidence, is reflected in tools, and taken up by implementers and policymakers. We hope to learn new practices and modes of work that enable the ICRG to capitalize on the momentum and excitement generated by previous activities. Additional audiences include USAID DDI/LFT and relevant Mission colleagues in current and future countries where we program.

Evaluation Questions

To achieve the purpose of this evaluation, the ICRG is seeking answers to the following questions:

General

- How do we capture these end-program outputs? In addition to wide dissemination and increasing access by users of our tools and content, how do we understand and measure policy impact?
  - o How can our indicator tracking better capture the true success and value of the project?
  - o How do we identify opportunities to better leverage and generate excitement around CRED-created deliverables?

Research

- How can the ICRG incentivize the uptake of CRED products/deliverables/tools we create, beyond the current strategies of co-creation, stakeholder engagement and response to demand?
- What data/indicators for successful cooperative development exist outside our CDOs? With an eye toward being useful to expand out impact, how do we capture local uptake and increase local policy impact?

Education/Learning

Beyond the current practices of update sharing and ad hoc coordination, how can we make the CG a more vibrant and collaborative community of practice and learning, while taking into account the time and other constraints of the CDO participants?

Dissemination

- What are some strategies to diversify dissemination?
  - o What are some additional mechanisms we can implement to engage and influence policymakers?
- How can CRED better capitalize on events, report releases, and other newsworthy items to influence the uptake of our findings and tools and form new partnerships?

In the answers to these questions, resource requirements together with recommendations should be delineated.

Evaluation Design and Methodology

As stated in the intended audience and uses, the ICRG expects to learn new practices and modes of work that make better use of the momentum and excitement generated by our previous activities. An outside, unbiased perspective on this is valuable to the ICRG to better understand areas for improvement and growth. Considering this need, ICRG expects any research design and methodology to be co-created in an iterative fashion with an evaluation firm or individual.

We anticipate, as appropriate, a quantitative and qualitative or mixed methods approach to include appreciative inquiry (AI) of ongoing programming. Our program audiences are in the center of CRED goals and activities. In addition to an AI approach, the design must include stakeholder and audience engagement, either through surveys, focus groups, or a combination of modes to develop recommended approaches. The approved design and methodology must also produce an actionable report of findings and suggestions forward that promote a deeper impact of current CRED activities.

Evaluation Products

Work Plan: during the co-creation phase, the evaluation firm or individual will prepare a detailed work plan which will include the methodologies to be used in the evaluation.

Methodology Report: a written methodology report will be prepared by the evaluation firm or individual to be agreed upon by the ICRG.

Preliminary Findings Presentation: the team will present preliminary findings to the ICRG over Zoom through a PowerPoint or similar presentation. The presentation will include a discussion of preliminary findings and achievements.

Draft Evaluation Report: a draft report of the findings and recommendations should be submitted to the ICRG that clearly describes findings, conclusions, and recommendations. ICRG will provide feedback on the draft report within two weeks of submission.

Final Report: The evaluation team will submit a final report that incorporates the responses to feedback and suggestions within one week of receiving feedback. The content of this report must adhere to the USAID Evaluation Policy in Appendix 1. The format will include an executive summary (1 page), table of contents, methodology (1 page), findings (4 pages), and recommendations (2 pages). Data analyzed in the report should be visualized in accompanying tables and figures. The report will be submitted in English, electronically.

Estimated Timeframe:

Work Plan – 1 week from work start

Methodology Plan – 2 weeks from work start

Preliminary Findings Presentation – 6 weeks from work start

Draft Eval Report – 8 weeks from work start

Final Report – 12 weeks from work start

Team Composition

The ICRG is open and willing to consult with individuals, firms, or small teams on this evaluation and will elect an evaluator that falls most in-line with desired services. The composition of the evaluation should include a key e expert with deep knowledge of evaluation methods and demonstrated experience evaluating non-implementation international development activities. This expertise should also demonstrate skills and experience in designing qualitative data collection tools, analyzing qualitative data, and interrogating digital dissemination strategies.

Evaluation Management

Logistical Support

ICRG will provide overall direction to the evaluation team, identify key documents, and assist in facilitating a work plan. ICRG will assist in arranging meetings with evaluation team throughout the evaluation process. Travel is not expected for this evaluation.

Period of Performance

Work is to be carried out over a period of approximately 10 weeks, beginning on or about November 8,2021 with final report and close out concluding on or about January 20, 2021.

USAID Evaluation Policy - Appendix 1

Criteria to Ensure the Quality of the Evaluation Report

- The evaluation report should represent a thoughtful, well-researched and well-organized effort to objectively evaluate CRED's experience and build upon that with strategies for future success.
- Evaluation reports shall address all evaluation questions included in the scope of work.
- The evaluation report should include the scope of work as an annex. All modifications to the scope of work, whether in technical requirements, evaluation questions, evaluation team composition, methodology, or timeline need to be agreed upon in writing by the technical officer.
- Evaluation methodology shall be explained in detail and all tools used in conducting the evaluation such as questionnaires, checklists and discussion guides will be included in an Annex in the final report.
- Evaluation findings will assess outcomes and impact on males and females.
- Limitations to the evaluation shall be disclosed in the report, with particular attention to the limitations associated with the evaluation methodology (selection bias, recall bias, unobservable differences between comparator groups, etc.).
- Evaluation findings should be presented as analyzed facts, evidence, and data and not based on anecdotes, hearsay, or the compilation of people's opinions. Findings should be specific, concise, and supported by strong quantitative or qualitative evidence.
- Sources of information must be properly identified and listed in an annex.
- Recommendations must be supported by a specific set of findings.
- Recommendations should be action-oriented, practical, and specific, with defined responsibility for the action.

3 SECTION C: PROPOSAL AND AWARD PROCESS

WHO CAN SUBMIT PROPOSALS?

This RFP is open to *firms or individuals* with significant experience and ability to provide midterm evaluation services on USAID funded awards.

- 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?

Questions regarding the RFP should be submitted in writing to researchgroup@ocdc.coop no later than October 22, 2021 at 5:00pm EST. Phone calls will not be accepted. OCDC will send answers to questions to all registered parties by October 26 at 5:00pm EST.

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 October 2021 and Offerors can expect to be notified of decisions on or about October 30, 2021. Awards will be contingent on obtaining USAID approval, if required. Activities are expected to begin around November 8, 2021 pending successful completion of negotiations, the results of the pre-award survey, and the checking of references.

The estimated period of performance is November 2021 – January 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 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: 60**	
Comprehensiveness of proposal approach. Demonstrated understanding of the nature of the evaluation task. Clarity and appropriateness of proposed activity. Evaluation approach is reasonable, specific, and achievable to meet the evaluation purpose and goals. Implementation plan and proposed timeline include all proposed elements of activity.	(Maximum Possible Points) 30
Past performance: Previous successful experience implementing similar qualitative evaluation activities. Preference given to inclusion of appreciative inquiry	(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 and demonstrated experience in implementing non project-focused evaluations.	(Maximum Possible Points) 20
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 Methodology	(limit of 6 pages)
Section 4: Management-Implementation	(limit of 2 pages)
Required Attachments to the Technical Proposals (no page limit):	
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: *(This must be an individual with the authority to negotiate and enter into a subagreement)*	**Telephone:** **Email (at least two):** **Website:**
Type of Entity: *(check one)* 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.
>
> 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 program evaluations. 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 November 2021-January, 2022.

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]

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

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.