



To: Potential Offerors

Date: Wednesday, August 29, 2018

From: Procurement and Partnerships Team, INVEST Project; Implemented by DAI Global LLC

Subject: Request for Proposals (RFP) INVEST-007 Mobilizing Private Investment for Development: Comprehensive Learning Strategy and Curricula to Advance Private Sector Engagement

DUE: 1:00PM EDT on **Monday, September 24, 2018**

Dear Offerors:

Enclosed is a Request for Proposals (RFP) to support the implementation of DAI's INVEST project funded by the United States Agency for International Development (USAID). DAI invites firms to submit a proposal for work to be funded by USAID under the Office of Private Capital and Microenterprise (PCM).

- I. RFP Process and deadlines:** This solicitation will result in the award of Fixed Price Purchase Order. We anticipate issuing a single subcontract award no greater than \$175,000 resulting from the implementation of this agreement.
- a. Submission of Questions – Questions must be submitted no later than 5:00 pm EDT on September 4, 2018 via email at INVEST_Procurement@dai.com. DAI will respond to these questions in approximately three (3) business days.
 - b. Submission of Proposals – Proposals must be submitted no later than **1:00 pm EDT on Monday, September 24, 2018** via email at INVEST_Procurement@dai.com, copying matthew_farrell@dai.com and talin_baghdadlian@dai.com. The subject line of the email should be your organization name, followed by “Submission under RFP INVEST-007: PSE Training” Please certify in your submission email a validity period of 60 days for the price(s) provided and include your organization's DUNS number. Please limit file submissions to 10 megabytes or less.
- II. Composition of Proposal:** Your organization's proposal should comprise the following submission documents. The Technical Proposal and Cost Proposal should be prepared as separate files for independent evaluation, as follows below. Technical proposals should be submitted as a five (5) page proposal. Please provide a copy of your cost proposal in Excel format.

Part 1 – Technical Proposal

One of the main objectives of this solicitation is to develop an innovative adult-learning strategy and corresponding curricula that understand the sociological and scientific components that drive adult learning and behavior change. Potential offerors are

encouraged to think creatively and innovatively in their presentation of their technical proposal, which should not exceed five (5) pages. Potential offerors are encouraged to use the five page space limit efficiently and effectively while determining the best format(s) to do so. The technical proposal's presentation should reflect the ideas espoused within it as well as address the following three (3) sections:

1. **Technical Approach** – Offerors will detail their approach to fulfilling the accompanying Statement of Objectives (SOO). The approach will clearly indicate how the proposed activities and learning approaches will result in effectively building the Agency's capacity, skills and understanding for how to undertake PSE throughout its program cycle. The technical approach should clearly demonstrate the offeror's understanding of existing learning strategies and approaches, not only limited to the USAID and the donor community context, but also inclusive of other types of organizations. This demonstration should result in examples of learning strategies or approaches that could achieve the goals stated in the Statement of Objectives.
2. **Institutional Capacity** – Offerors should provide details about the experience, expertise, or capacity of their firm to recommend the proposed approach and complete the work as described. This should include past performance information for similar work completed for USAID as well as other organizations, such as work to: design learning frameworks and strategies; develop curricula; and, design and develop curricula.
3. **Management Plan/Staffing Structure** – Offerors should include details of personnel who might be assigned to the activities described in the technical approach, as well as a clear management plan for the development, review, and submission of all associated deliverables, including a milestone schedule. Offerors are permitted to engage in partnering arrangements that will aid in providing best value to USAID, regardless of whether organizations belong to the USAID INVEST network. If a partnering arrangement is being proposed, please describe the nature of the arrangement and the appropriate management controls to ensure successful delivery.

In addition to the above, please include the following. These inputs will not be counted as part of the 5-page limit and the format may be PDF or Word:

- One (1) to two (2) case study examples or qualifications statements of past performance relevant to this activity (limited to two (2) pages per case study)
- CV(s) of any individuals proposed in the staffing plan to conduct this activity (limited to two (2) pages per individual)

A cover page will be considered a non-counting page, should offerors choose to include one. No additional annexes or documentation are requested at this time.

Part 2 – Cost Proposal

The contract type for the presumptive task order will be Fixed Price, awarded as a subcontract by DAI Global, LLC. Please include your total proposed fixed price along with details for specific deliverable pricing. Offerors should also include a cost breakdown of the hourly rates for proposed personnel, if applicable, with a build-up to their total proposed price or include substantiating price reasonableness documentation/justification. Offerors are expected to use their own cost/budget template(s); please limit file submissions to 10 megabytes or less.

- III. Evaluation of Proposal:** DAI will use best value determination for the award of this Request for Proposals. A best value determination means that, in DAI's estimation, the selected offer will provide the greatest overall benefit to PCM in response to the requirements stated in this RFP. Proposals will be evaluated against a stated number of factors, including the overall proposed approach, past performance, specific qualifications in the identified sectors and other evidence substantiating the bidder's ability to deliver, and budget and time frame considerations.
- 1. Technical Proposal:** The Technical Proposal will be scored and evaluated separately from the cost proposal. Technical panel reviewers will evaluate offerors on the following factors, consistent with the offerors' technical proposal.
 - a. Technical Approach (40 points)** - Points for this section will be awarded based on the information presented in the technical approach. Points will be awarded to firms describing their thoughtful approach to addressing the statement of objectives. The offeror will be scored based on its presentation of a clear approach which reflects the requirements of this specific activity but also incorporates the offeror's unique competencies.
 - b. Institutional Capacity (30 points)** - Points for this section will be based on information presented in the corresponding section. Preference will be given to firms that have past performance in timely and successful delivery of similar services and/or relevant experience.
 - c. Management Plan/Staffing Structure (30 points)** – Points for this section will be based on the qualifications of proposed staff, the complementary nature of any partnering arrangement, and the demonstrated efficacy of the management plan.
 - 2. Cost Proposal:** Cost will be evaluated separately from the technical approach, with due consideration for price reasonableness and allowability consistent with U.S. government cost principles. Evaluation for this section will be dependent upon all information presented by the Offeror in their deliverable table and supporting cost information, as well as its alignment with the proposed technical approach.
- IV. Offeror's Agreement with Terms and Conditions:** The completion of all RFP requirements in accordance with the instructions in this RFP and submission to DAI of the technical and price proposals will constitute an offer and indicate the Offeror's agreement to the terms and conditions in this RFP and any attachments hereto. DAI is not required to accept and/or evaluate proposals that do not conform to the instructions of the RFP, and additionally, DAI may reject all proposals and not award a subcontract for this RFP. DAI reserves the right to award a subcontract without discussion and/or negotiation; however, DAI also reserves the right to conduct discussions and/or negotiations, which among other things may require an Offeror(s) to revise its proposal (technical and/or price). Issuance of this RFP in no way obligates DAI to award a subcontract, nor does it commit DAI to pay any costs incurred by the Offeror in preparing and submitting the proposal. DAI reserves the right to award a subcontract to one organization or to issue multiple awards to different organizations based on the results of our evaluation.

Thank you,

DAI INVEST Procurement and Partnerships Team
INVEST_Procurement@dai.com

The INVEST Project: Mobilizing Private Investment for Development Statement of Objectives for Developing a Comprehensive Learning Strategy and Curricula to Advance Private Sector Engagement

Overview of INVEST:

Through the INVEST Project, USAID seeks to unlock the potential of the private sector to drive inclusive growth in countries around the world. The private sector is an increasingly critical partner for achieving sustainable outcomes capable of moving countries beyond the need for assistance. Driving the changing dynamic between private sector and development activities is growing alignment in priorities and interests. Increasingly, private investors and businesses are looking to emerging markets for better returns and new market opportunities. However, encouraging private investment and activity in high-impact areas important to USAID such as agriculture, financial services, infrastructure, energy, clean water, health, and education requires new forms of collaboration between USAID and the private sector. USAID is seeking more strategic engagement and collaboration with the private sector throughout its planning and programming.

INVEST will deploy USAID resources globally, including grants, guarantees, technical expertise, networks, and convening power, to enhance access to viable investment opportunities, lower transaction costs, and mitigate investment risk. INVEST will also provide access to a network of individuals and firms with the specialized expertise across industries and geographies needed to identify, develop, and execute on investments for development impact. Using a lean approach tailored to high potential opportunities, relevant parts of the network will come together to research, develop, and build specific solutions that align private capital with development needs.

Introduction:

USAID's Office of Private Capital and Microenterprise (PCM) was established within the Bureau for Economic Growth, Education and Environment (E3) to increase the Agency's capacity to mobilize private sector resources and expertise in support of development priorities. As USAID moves towards an increasingly enterprise-driven model for development, PCM recognizes the need for staff capacity to integrate private sector engagement (PSE) throughout the Program Cycle. Integrating PSE throughout the Program cycle allows USAID to better facilitate market-based approaches for more sustainable development outcomes.

In partnership with other relevant parts of USAID, including the Center for Transformational Partnerships (CTP), PCM is seeking support to design and develop a multilayered, comprehensive Private Sector Engagement (PSE) learning strategy and curricula to build the Agency's capacity, skills and understanding for how to undertake PSE throughout its Program Cycle. As a basis for the design and development of the learning strategy and curricula, USAID anticipates the need for a short assessment phase followed by more in-depth design and development phases. Given the breadth of subject, range of expertise needed and USAID's organizational structure, it is also anticipated that such a strategy and curricula should consider innovative and non-traditional approaches to learning, remote learning options, certification programs, mentorship, and the potential to train its implementing partners.

Statement of Objectives

Under this statement of objectives, the selected partner/partners will:

1. **Conduct an assessment to define baseline knowledge and skills related to PSE within USAID** (~20% expected effort)
 - Through a combination of key informant interviews with Washington and Mission staff and external stakeholders, desk-based research, and review of USAID and other relevant training programs and resources, assess:
 - current level of skill and competencies required for PSE that exist within the Agency;
 - how existing training programs and resources relate to required skills and competencies for PSE.

2. **Design and develop an overarching adult learning framework and strategy** (~40% expected effort)
 - In conjunction with USAID stakeholders, provide a work plan for how to support the PSE capacity building working group in developing a comprehensive adult learning strategy capable of building capacity to engage PSE throughout the Program Cycle.
 - Develop a strategy for shifting the culture and mindset of the Agency towards a market-based or enterprise-led approach to development – including capacity building and policy reform. Including:
 - broad objectives and options for building the knowledge and skills needed within the Agency to facilitate PSE and mobilizing private sector capital.
 - the different levels of knowledge and skills mastery based on position/backstop and/or seniority (as well as different levels of country development).
 - Present options on training modalities, including analysis of what modalities would be most appropriate based on cost, audience, content, as well as for long-term retention and cultural change within USAID.

3. **Develop and finalize PSE adult learning curricula** (~40% expected effort)
 - In conjunction with the PSE capacity building working group and based upon the strategy and framework, finalize a PSE adult learning curricula to lift Agency personnel to requisite levels of PSE knowledge and build capacity to integrate PSE throughout the Program Cycle.
 - Depending on strategy framework, curricula may be: based on current USAID materials and learning opportunities; based on materials, courses and learning opportunities identified in the learning strategy; or, most likely, a combination of the two.

INVEST Proposed Support:

INVEST will work closely with PCM and the selected partner(s) during all stages of this work. DAI will subcontract the selected partner(s) directly and provide review and oversight throughout the life of the activity in accordance with INVEST’s lean management approach. DAI will administer periodic check-ins, reporting, deliverable review prior to client presentation and approval, and manage an ongoing ME&L framework.

- **Partner Onboarding:** DAI will work closely with USAID/PCM and USAID/CTP staff to provide the successful offeror(s) with all necessary context, and work with USAID/PCM and USAID/CTP staff and the successful offeror(s) to develop work plan(s)
- **Project Implementation:** The selected partner(s) will implement the work as prescribed by the work plan(s). DAI will provide management support and ensure periodic check-ins/reporting

- Ongoing Monitoring, Evaluation, and Learning: DAI will define indicators in subcontract, collect and review M&E data from subcontractors for requisite reporting to USAID. DAI will conduct data quality assessments as necessary.

Timeframe:

Activity	Timeframe
Onboarding & Work-planning	1 week
Activity 1: Baseline Assessment	2 weeks
Activity 2: Strategy Development	4 weeks
• USAID review	1 week
Activity 3: Develop and Finalize Curricula	2 weeks
• USAID review	2 weeks
Finalize Strategy and Curricula	1 week

Note: Due to funding restrictions, all work must be completed by March 2019.