

Request for Proposals No. 2017-0501

**Education Development Center, Inc.
(Hereafter referred to as “EDC”)
Request for Proposals for the Procurement of
Data Collection Services for
Basa Literacy Assessment Tool for Kindergarten in the Philippines
(Basa LAT-K)**

Date of Issuance:
May 14, 2017

Education Development Center, Inc. (EDC) is an international nonprofit organization that develops, delivers, and evaluates innovative programs to address some of the world's most urgent challenges. Our work includes research, training, educational materials and strategy, with activities ranging from seed projects to large-scale initiatives. EDC enjoys a worldwide reputation for its excellence in program and fiscal management and for the impact of its work.

The Basa Pilipinas Project is a 4.5-year (January 2013 – May 2018) national early grade reading project that supports the Philippine Department of Education in its implementation of the literacy component of the K to 12 curriculum. The objective of the project is to improve reading skills of one million children in the early grades in selected areas in Luzon and Visayas, in Filipino, English, and selected mother tongues. The Basa Pilipinas project also provides technical assistance to DepEd in its implementation of mother tongue instruction in the language arts curriculum. Specifically, the project shall work to achieve results in Improved Reading Instruction (IR1), in Improved Reading Delivery Systems (IR2), and in Improved Access to Quality Reading Materials (IR3). EDC's work on the Basa Pilipinas project is funded by the United States Agency for International Development (USAID) under Contract No. AID-492-C-13-00004; organizations submitting proposals in response to this Request for Proposal ("RFP") have no relationship with USAID under the terms of this RFP or any resultant contract. All communications regarding this RFP must be directed to EDC.

1. Purpose and Eligibility

1.1 Purpose

The purpose of this RFP is to invite prospective Offerors to submit a proposal to provide data collection services using the Basa Literacy Assessment Tool for Kindergarten (Basa LAT-K) in the Philippines.

1.2 Eligibility

This procurement is open to offers from organizations which are incorporated or legally organized under the laws of one of the following countries, operating as a going concern in one of the following countries and either (1) is managed by a governing body, the majority of whom are citizens or lawful permanent residents of countries one of the following countries or (2) employs citizens or lawful permanent residents of one of the following countries in more than half its permanent full-time positions and more than half of its principal management positions:

the United States, the Cooperating Country Name, Afghanistan, Angola, Armenia, Bangladesh, Belize, Benin, Bhutan, Bolivia, Burkina Faso, Burundi, Cambodia, Cameroon, Cape Verde, Central African Republic, Chad, Comoros, Democratic Republic of Congo, Republic of Congo, Côte d'Ivoire, Djibouti, Arab Rep. of Egypt, El Salvador, Eritrea, Ethiopia, Fiji, The Gambia, Georgia, Ghana, Guinea, Guinea-Bissau, Guatemala, Guyana, Haiti, Honduras, India, Indonesia, Iraq, Kenya, Kiribati, Dem. Rep. of Korea, Kosovo, Kyrgyz Republic, Lesotho, Liberia, Lao PDR, Madagascar, Malawi, Mali, Marshall Islands, Mauritania, Moldova, Mongolia, Morocco, Mozambique, Fed. Sts. of Micronesia, Myanmar, Nepal, Nicaragua, Niger, Nigeria, Pakistan, Papua New Guinea, Paraguay, Philippines, Rwanda, Samoa, São Tomé and Príncipe, Senegal, Sierra Leone, Solomon Islands, Somalia, Sudan, Sri Lanka, Swaziland, Syrian Arab Republic, Tajikistan, Tanzania, Timor-Leste, Togo, Tonga, Turkmenistan, Tuvalu, Uganda, Ukraine, Uzbekistan, Vanuatu, Vietnam, West Bank and Gaza, Rep. of Yemen, Zimbabwe, and Zambia.

2. General Information

2.1 Original RFP Document

EDC shall retain the RFP, and all related terms and conditions, exhibits and other attachments, in original form in an archival copy. Any modification of these, in the Offeror's submission or subsequent contract, is grounds for immediate disqualification.

2.2 RFP Provisions

1. All information provided by EDC in this RFP is offered in good faith. EDC makes no certification that any item is without error. EDC is not responsible or liable for any use of the information or for any claims asserted there from.
2. This RFP does not under any circumstances commit EDC to pay any costs incurred by the Offeror in the submission of a proposal. This is the Offeror's responsibility.
3. All materials submitted in response to this RFP shall become the property of EDC upon delivery to EDC.
4. Additional documentation may be required prior to selection.

2.3 Schedule of Events

The following schedule applies to this RFP but may change in accordance with EDC's needs or unforeseen circumstances. Changes in this timeline will be announced as formal modifications to the RFP.

STEP No.	TIME	DATE	STEP
1	5:00 pm Manila time; (UTC+8:00)	May 29, 2017	Deadline for request for any clarifications from the EDC. Questions must be submitted in writing via email to BasaPilipinasRFQ@edc.org
2	5:00 pm Manila time; (UTC+8:00)	June 2, 2017	Estimated date for issuance of any clarifications by EDC. All Questions will be answered in one document which will be posted at www.rfpdb.com and http://web.sba.gov/subnet/search/index.cfm websites on which answers to questions will be posted under the heading "Modification to EDC RFP No. 2017-0501", or Offerors may contact Basa Pilipinas at BasaPilipinasRFQ@edc.org to obtain a copy
3	5:00 pm Manila time; (UTC+8:00)	June 9, 2017	Deadline for submission of proposals

2.4 Inspection and Acceptance

Under any contract awarded in response to this RFP, EDC may inspect and test the deliverables to determine whether such deliverables conform to the terms of the contract and its attachments. Unless otherwise agreed to in writing by EDC, EDC shall have a right to inspect deliverables for conformity before payment or acceptance of such deliverables, in accordance with Section 2-513(1) of the UCC. Payment for deliverables made before inspection for conformity shall not constitute an acceptance of such deliverables or impair EDC's right to inspect such deliverables or any of EDC's remedies, in accordance with Section 2-512(2) of the UCC. Deliverables rejected or supplies in excess of quantities ordered may be returned to the selected Offeror at the selected Offeror's expense.

3. Proposal Submission and Selection

3.1 Offeror's Understanding of the RFP

In responding to this RFP, the Offeror fully understands the RFP in its entirety and in details, including making any inquiries to EDC as necessary to gain such understanding. Clarification questions must be submitted by potential Offerors—in writing—by the date and time listed in Section 2.3, Step No. 1. Responses will be published in writing. EDC reserves the right to disqualify at its sole discretion any Offeror who submits a proposal that is not responsive or that demonstrates less than such understanding. That right extends to cancellation of the contract if a contract has been made. Such disqualification and/or cancellation shall be at no fault, cost, or liability whatsoever to EDC.

3.2 Communication

Verbal communication shall not be effective. In no case shall verbal communication govern over written communications.

Offerors' inquiries, questions, and requests for clarification related to this RFP are to be directed in writing in English before the date and time listed in Section 2.3, Step No. 1 to:

Education Development Center, Inc.
Attention: Basa Pilipinas
E-mail: BasaPilipinasRFQ@edc.org

3.3 Proposal Submission

Proposals must be provided on the Offeror's letterhead or stationery and include Draft Workplan, Draft List of Recommended Assessors, Team Leaders and Supervisors, Organizational Information and Certification form provided as Annex C, Price Quotation provided as Annex B. Annex D is applicable to US businesses only. Cost proposals must be **Value Added Tax (VAT) Exempt** and delivered via email in PDF, post mail or hand delivered before the deadline date and time of June 9, 2017, 5:00 PM (UTC+08:00) to:

Send via email in PDF, postal mail or hand delivered to:

Education Development Center, Inc.

Attention: Basa Pilipinas RFQ

Email: BasaPilipinasRFQ@edc.org

Postal address: EDC/Basa Pilipinas, 1010 Meralco Avenue, 3rd floor, L. Orosa Building, Brgy. San Antonio, Pasig City, Philippines

Hand delivery address: EDC/Basa Pilipinas, 1010 Meralco Avenue, 3rd floor, L. Orosa Building, Brgy. San Antonio, Pasig City, Philippines

The technical proposal and the cost proposal must be sent in separate emails. Proposals must have the subject line of "Proposal in response to RFP No. 2017-0501" and must include the number of emails (for example, Email 1 of 2, Email 2 of 2, etc.) in the subject line. The Proposal itself must include all documents required by the RFP in Word, Excel, or PDF and those documents must be attached to the email message(s); all attachments must be clearly labeled and must be numbered sequentially in order for EDC to review the Proposal. If the Proposal is sent in more than one email message, the Offeror must send all of the email messages with the Proposal submission on the same day and time the sending of the emails as closely as practicable. If the proposal is mailed or hand delivered, technical proposal and cost proposal must be submitted in separate envelopes.

It is the responsibility of the Offeror to ensure that the proposal is delivered to EDC by the deadline date listed in listed in Section 2.3, Step No. 3.

3.4 Complete Proposals

EDC will determine which proposals include the components required by the RFP and are considered to be a complete proposal. Please note that although EDC will determine certain proposals to be complete, this determination does not signify that an award will be made to one or any of the Offerors with complete proposals.

3.5 Minimum Requirements and Evaluation Criteria

3.5.1 Minimum Requirements

Offerors must meet the following minimum requirements:

- A minimum of one year’s experience in carrying out/managing data collection, preferably with pre-school or primary age children in the Philippines;
- A minimum of one year’s experience working with internationally funded, preferably USAID, basic education/early grade reading projects in the Philippines;
- The Offeror’s data collectors should have:
 - experience working with preschool-age or primary age children (i.e. former teacher/teaching aide or have undergraduate degree/equivalent in basic education and/or early grade reading);
 - Fluent in English and Filipino;
 - Knowledge of one of the mother tongues – Ilokano or Sinugbuanong Binisaya;
 - Previous experience administering assessments or service as data collector is preferred.

Offerors that do not meet the minimum requirements listed above will not be considered eligible for potential funding and, therefore, proposals from these organizations will not be further evaluated. Proposals from organizations that meet the minimum requirements will be evaluated based on the following criteria listed below.

3.5.2 Evaluation Criteria

The purpose of this RFP is to identify those organizations that have the interest, capability, and financial strength to supply the services identified in Section 4. EDC will evaluate proposals in accordance with this section and intends to award a contract to the responsible Offeror whose proposal represents the best value to EDC. “Best value” is defined as the offer that results in the most advantageous solution for EDC, in consideration of technical, cost, and other factors.

The submitted technical information will be scored by a technical evaluation committee using the technical criteria shown below.

Technical Evaluation Criteria:

Technical Criteria	Description	Maximum Points
Technical Approach, Methodology, and Detailed Work Plan	1. Does the proposal clearly explain, understand and respond to the objectives of the project as stated in the Scope of Work?	30
Management, Key Personnel, and Staffing	2. Personnel Qualifications – Do the proposed team members have necessary experience and capabilities to carry out the Scope of Work?	30

Technical Criteria	Description	Maximum Points
Corporate Capabilities, Experience, and Past Performance	3. Organization’s Background and Experience – Does the company have experience relevant to the project’s Scope of Work?	40
	Total Points	100

Cost proposals will be evaluated, but will not be assigned a rating. The evaluation of cost will include a determination of cost realism, completeness, and reasonableness. Cost realism is defined as the Offerors’ ability to project costs that are realistic for the work to be performed; reflect a clear understanding of the requirements; and are consistent with the Offeror’s technical capacity.

Technical and cost will be evaluated relative to each other, as described herein. Technical is significantly more important than cost.

3.5.3 Competitive Range

EDC may establish a Competitive Range composed of only the most highly rated proposals. In certain circumstances, EDC may determine that the number of most highly rated proposals that might otherwise be included in the Competitive Range exceeds the number at which an efficient competition can be conducted. Should that be the case, EDC may then limit proposals in the competitive range to the greatest number that will permit an efficient competition among the most highly rated offers. EDC may exclude a proposal if it is so deficient as to essentially require a new technical proposal. EDC may exclude a proposal so unreasonably priced, in relation to more competitive offers, as to appear that there will be little or no chance of becoming competitive. EDC may exclude an offer requiring extensive discussions, a complete re-write, or major revisions such as to allow an Offeror unfair advantage over those more competitive offers.

3.6 Selection

This procurement utilizes the tradeoff process set forth in FAR 15.101-1. EDC is not obliged to award a contract based on lowest proposed cost, or to the Offeror with the highest technical evaluation merit. Although for this procurement, Technical Proposal merits are considered significantly more important than cost/price relative to deciding who might best perform the work; cost factors must also be considered. Therefore, after the final evaluation of proposals, EDC intends to issue the contract to the Offeror whose proposal offers the best value to EDC considering both technical and cost factors. Further, EDC may award to a higher priced Offeror if a determination is made that the higher technical evaluation of that Offeror merits the additional cost/price.

EDC may award one or more contracts resulting from this RFP to the Offeror(s) whose proposal(s) conforming to this RFP offer(s) the best value. EDC may also (a) reject any or all proposals, (b) accept other than the lowest proposal, or (c) accept more than one proposal. Contracts may be issued for some or all of the deliverables.

EDC may award a contract without discussions with Offerors. As such, Offerors are strongly encouraged to submit their best proposals with their original submissions. EDC reserves the right to site visits and/or to conduct discussions, which may result in revisions to proposals, with one or more than one or all Offeror(s) if EDC determines, at its sole discretion, discussions to be necessary. Discussions may include oral presentations provided by the Offeror.

4. Technical Specifications & Requirements

4.1 Statement of Work and Specifications

All of the requirements listed in Section 4.1 must be met.

4.1.1 Statement of Work

Background

Basa Pilipinas, the flagship basic education project of USAID, is helping DepEd improve the reading skills of early grade children in Filipino, English, and selected Mother Tongues. For its extension program, Basa has expanded its support to the Kindergarten program, which is likewise an integral part of the early grade literacy cycle.

The selected Offeror will be responsible for collecting the data using the Basa-developed Literacy Assessment Tool for Kindergarten (Basa LAT-K) on **September 11-29, 2017** as part of Basa's Kindergarten impact research. The research, which is both cross-sectional and longitudinal in design, will be administered to 2,240 randomly selected Kindergarten students across 160 schools in both Basa and non-Basa assisted Divisions. EDC will provide technical assistance (i.e. training) and project oversight.

Assessors, Team Leaders, and Field Supervisors

The selected Offeror will identify 80 field-based assessors (64 core assessors and 16 buffer assessors), 16 team leaders and 5 supervisors who EDC will train on **August 28-September 1, 2017** to administer the Kinder Literacy Assessment Tool. Team leaders should be prepared to step in as assessors, in case any of the core or buffer assessors gets sick or cannot be deployed to the field for whatever reason. The assessors should possess the following skills and experience:

- Experience working with preschool-age or primary age children (i.e. former teacher/teaching aide or have undergraduate degree/equivalent in basic education and/or early grade reading);
- Fluency in English and Filipino;
- Knowledge of one of the mother tongues – Ilokano or Sinugbuanong Binisaya;
- Experience and proficiency in using a touch screen tablet;
- Previous experience administering assessments or service as data collector is preferred.

The Offeror will submit the CVs of all 80 field-based assessors, 16 team leaders and 5 supervisors to EDC for approval. In addition, EDC reserves the right to reject any proposed assessor, team leader or supervisor who does not perform to minimum standards during the training, and ask for a replacement with demonstrated capacity.

Team Composition

The 80 selected field-based assessors will be organized into 16 teams of 4 people plus the team leader (each team will be assigned a team leader) and deployed based on the following configuration: 8 teams to Basa-assisted Divisions (2 each for Bohol/Tagbilaran, Cebu/Mandaue, and Ilocos Sur; 1 each for La Union/San Fernando, Ilocos Norte) and 8 teams to non-Basa Divisions. Each field area will be assigned 1 supervisor to provide remote and site-based support to the data collection teams. All supervisors are expected to visit at least once with every team at a school-site to monitor and support data collection. With the use of touch-screen devices, data will be uploaded to the EDC's central server on a daily basis for further data processing.

Data Collection

Data collection is expected to be conducted through use of touch screen tablets during September 2017. EDC will provide all assessors with the following tools:

- Tablets fully charged and loaded with the current version of the assessment instruments;
- A memo / endorsement from DepEd regarding the assessment to be done in schools
- A list of schools with complete contact information that are included in the survey
- Pencils, erasers, snacks to give to pupils in appreciation for their participation.

The selected Offeror will participate in debrief meetings led by designated EDC personnel.

The following table describes the team composition plan.

BASA COVERED AREAS	SCHOOLS	KG PUPILS	CORE ASSESSORS	BUFFER ASSESSORS	TEAM LEADERS	SUPERVISORS
BOHOL/TAGBILARAN	20	280	8	2	2	1
CEBU/MANDAUE	20	280	8	2	2	1
ILOCOS NORTE	10	140	4	1	1	1
ILOCOS SUR	20	280	4	1	1	1
LA UNION/SAN FERNANDO	10	140	8	2	2	1
TOTAL	80	1120	32	8	8	5

NON-BASA AREAS	SCHOOLS	KG PUPILS	CORE ASSESSORS	BUFFER ASSESSORS	TEAM LEADERS	SUPERVISORS
TBD – REGION 7	20	280	8	2	2	-
CEBU – REGION 7	20	280	8	2	2	-
ILOCOS NORTE – REGION 1	10	140	4	1	1	-
ILOCOS SUR – REGION 1	20	280	4	1	1	-
TBD – REGION 1	10	140	8	2	2	-
TOTAL	80	1120	32	8	8	See note*

Note: The Offeror will assign five supervisors – one supervisor will cover one Basa and Non-Basa site.

Operations/Logistics

The selected Offeror will also ensure proper use and storage of tablets and report any issues immediately to EDC point of contact. The selected Offeror is not expected to budget for any hardware or related accessories, but should plan to support the management and security of the hardware, including:

- Receipt, inventory and storage of hardware devices in a secure environment;
- Charging and configuring tablets according to instructions provided by EDC;
- Distribution of tablets to assessors and collecting them after fieldwork has been completed;
- Appropriate handover of tablets to EDC.

The selected Offeror should coordinate schedule and deployment plans with EDC designated personnel and must provide its own logistical/transportation support for its Manila-based staff to the field sites where Basa LAT-K assessment will be administered. Therefore, anticipated costs for the Offeror's

Manila-based staff should be included in the proposal budget. Lodging and per diem estimates cannot exceed rates prescribed by EDC in Annex E. The selected Offeror will be responsible for recruitment of field assessors.

EDC will cover the cost of field assessors' hotel accommodation, transportation to/from sample schools, and per diem in compliance with EDC policies and procedures. Therefore, Offerors should not include these costs for field-based assessors in the proposal budget, except for its Manila-based staff deployed to the field.

4.1.2 Deliverables

Deliverable Number	Required Deliverables	Due Dates
1	Draft Workplan Proposal for EDC approval	Within 1 work week following the award
2	Draft List of recommended assessors, team leaders and supervisors for EDC approval	Within 30 work days following the award
3	Attendance Sheet from Basa LAT-K Training on August 28-September 1, 2017	COB September 4, 2017
4	Draft Fieldwork Report which covers the methodology, framework and general observations of the team during fieldwork	Within 2 work weeks following the completion of LAT-K assessment
5	Final Fieldwork Report and Invoice submission	Within 30 work days following the completion of LAT-K assessment

4.1.3 Delivery Location

The selected Offeror(s) must deliver the deliverables referenced in 4.1.2 to Education Development Center, Inc. (EDC) to Basa Pilipinas via email at BasaPilipinasRFQ@edc.org. The hard copies of deliverables must be submitted to 1010 Meralco Avenue, L.Orosa Building, 3rd floor, EDC/Basa Pilipinas Office, Pasig City, Barangay San Antonio, 1605, Metro Manila, Philippines.

4.1.4 Warranty

All Offerors must provide a document with proposed or applicable warranty for each of the deliverable in order for their proposal to be reviewed. In addition to any other express or implied warranties, Offerors must expressly warrant that:

- all deliverables delivered under any contract resulting from this RFP will be merchantable, new, suitable for the uses intended, of the grade and quality specified, free from all defects in design, material and workmanship, conform to all samples, drawings, descriptions and specifications furnished, and be free of liens and encumbrances and that the use, distribution or resale of deliverables by EDC will not infringe any third party's patent, trademark, trade secret, copyright, or any other proprietary, intellectual property or other right held by any third party.
- none of deliverables delivered under any contract resulting from this RFP will be counterfeit.

The warranties set forth shall not be waived by reason of the acceptance of deliverables or payment therefore by EDC.

4.1.5 Other specifications

Offerors may not provide any commodities which were manufactured or produced in or shipped from countries sanctioned by the US government. Proposals that include commodities produced in or shipped from countries sanctioned by the US government shall not be considered.

If the commodities are not already in the Philippines at the time of purchase, commodities must be shipped to the Philippines from one or more of the following countries: the United States, Afghanistan, Angola, Armenia, Bangladesh, Belize, Benin, Bhutan, Bolivia, Burkina Faso, Burundi, Cambodia, Cameroon, Cape Verde, Central African Republic, Chad, Comoros, Democratic Republic of Congo, Republic of Congo, Côte d'Ivoire, Djibouti, Arab Rep. of Egypt, El Salvador, Eritrea, Ethiopia, Fiji, The Gambia, Georgia, Ghana, Guinea, Guinea-Bissau, Guatemala, Guyana, Haiti, Honduras, India, Indonesia, Iraq, Kenya, Kiribati, Dem. Rep. of Korea, Kosovo, Kyrgyz Republic, Lesotho, Liberia, Lao PDR, Madagascar, Malawi, Mali, Marshall Islands, Mauritania, Moldova, Mongolia, Morocco, Mozambique, Fed. Sts. of Micronesia, Myanmar, Nepal, Nicaragua, Niger, Nigeria, Pakistan, Papua New Guinea, Paraguay, Philippines, Rwanda, Samoa, São Tomé and Príncipe, Senegal, Sierra Leone, Solomon Islands, Somalia, Sudan, Sri Lanka, Swaziland, Syrian Arab Republic, Tajikistan, Tanzania, Timor-Leste, Togo, Tonga, Turkmenistan, Tuvalu, Uganda, Ukraine, Uzbekistan, Vanuatu, Vietnam, West Bank and Gaza, Rep. of Yemen, Zimbabwe, and Zambia.

4.2 Travel and Shipment

4.2.1 Travel

If the selected Offeror will need to travel in order to complete the deliverables to Education Development Center, Inc. (EDC), air travel must be in compliance with USAID and U.S. Government regulations which require travel in compliance with the Fly America Act. If the selected Offeror will not need to travel, please state this in the proposal.

4.2.2 Shipment

Shipment will not be allowed under any contract resulting from this RFP.

5. Proposal Requirements

Proposals must be submitted in English language.

5.1. Technical Proposal Requirements

All proposals in response to this RFP must include the following:

1. A detailed technical proposal of what services and products exactly will be provided to EDC, including a narrative to justify the choices proposed will meet EDC's needs outlined in Section 4 and all technical information. If alternative solutions are also proposed, please include the above details for each alternative.
2. An organizational capacity statement outlining the Offeror's institutional capability in relevant project activities and the Offeror's financial and administrative capability and experience.
3. A description of similar work performed by the Offeror.
4. A list of qualified professional and technical personnel, proposed under the Offeror's proposal, including details of their relevant experience and relevant assignments in the past three years.

5.2 Price Proposal Requirements

All Offerors must submit a cost breakdown for completing the work described in this RFP. In response to this RFP, EDC anticipates issuing a VAT-exempt fixed price contract. If the Offeror is a US entity, the price proposal must be in US dollars. If the Offeror is a non-US entity, the price proposal must be in Philippine peso and be converted into US dollars. The exchange rate used to cover from Philippine peso to US dollars must be specified and justified. All Offerors must provide a price guarantee that the proposal price remains valid for 120 days.

5.2.1 Total Price Summary

Offerors must provide a price summary as displayed below, as well as a narrative describing how the price was calculated. The price summary, detailed budget, and all discussion of costs, including the budget notes, must be organized consistent with the cost categories specified below. If there is no proposed cost in a particular category, include zero (0) for that category.

Exchange Rate: _____

Price Summary	Rate in Php	Rate in USD	Unit Type	# of Units	Amount (Php)	Amount (USD)
Direct Labor						
Salary and Wages						
<i>Project Manager (PM) - full name</i>			month			
<i>Supervisors (5) – full names</i>			month			
<i>Team Leaders (16)</i>			day			
<i>Core Assessors (64)</i>			day			
<i>Buffer Assessors (16)</i>			day			
Fringe Benefits (itemized)						
TOTAL DIRECT LABOR						
Other Direct Costs						
Travel, Transportation, Per Diem and Miscellaneous Costs for Manila-based staff						
<u>LAT-K Training (site TBD)</u>						
Project Manager (Manila)						
<i>roundtrip airfare (Manila-Laoag) for PM</i>			round trip			
<i>taxi to/from airport - Manila for PM</i>			round trip			
<i>Taxi to/from airport – Laoag for PM</i>			Round trip			
<i>lodging (PM) - Laoag</i>			day			
<i>per diem</i>			day			
Supervisors (5) – only if Manila-based staff						
<i>roundtrip airfare</i>			round trip			
<i>taxi to/from airport</i>			round trip			
Team Leaders (16) – only if Manila-based staff						
<i>Ground transport to/from LAT-K Training site</i>			round trip			
Allowances						
<i>allowance #1 – description (e.g. mobile load)</i>	-	-	day			
Equipment and supplies						
Assessors						

<i>notebooks</i>			each			
<i>pens</i>			each			
TOTAL OTHER DIRECT COSTS						
Indirect Costs (%)* - <i>see note below</i>						
Total Cost (Direct Labor Plus Other Direct Costs Plus Indirect Costs)						
Fee/Profit (%)** - <i>see note below</i>						
Total Price (Total Cost Plus Fee/Profit)						

***Indirect Costs:** If the Offeror has a Negotiated Indirect Cost Rate Agreement (NICRA), indirect costs must be proposed in accordance with the Offeror’s NICRA and a copy of the NICRA must be included in the cost proposal. If indirect costs rates have not been previously established with the US Government, a breakdown of bases, pools, method of determining the rates and description of costs, and **two years** of financial statements, preferably audited by an independent auditor must be submitted.

****Fee/Profit:** The proposed fee/profit must be supported with rationale based on associated risk factors.

5.2.2 Detailed Budget & Budget Narrative

The detailed budget must show:

- Each cost within a budget category (e.g., within the direct labor category, there must be a separate line in the budget for each staff position; within the equipment category, there must be a line for each type of equipment, etc.);
- For each line item, the estimated cost per unit, the unit type (e.g. per month, per trip, per person, etc.), the number of units, and the total cost (i.e. the estimated cost per unit multiplied by the number of units); and
- all formulas.

The budget narrative must include information about how the amounts for each estimated cost were determined. The following definitions of types of costs should be utilized in preparing the cost proposal:

Salary and Wages: Direct salary and wages should be proposed in accordance with the Offeror’s personnel policies. For example, costs of long-term and short-term personnel should be broken down by person years, months, days or hours.

Fringe Benefits: If fringe benefits are provided for as part of an organization’s indirect cost rate structure, a copy of the organization’s Negotiated Indirect Cost Rate Agreement must be included in the cost proposal. If fringe benefits rates are not included in the organization’s Negotiated Indirect Cost Rate Agreement, a detailed cost breakdown by benefits types must be provided.

Consultants: This category is for services rendered by persons who are members of a particular profession or possess a special skill and who are not officers or employees of the Offeror. Costs of consultants should be broken down by person years, months, days or hours.

Travel, Transportation, and Per Diem: This category is for costs for transportation, lodging, meals and incidental expenses. Costs must be broken down by the number of trips, domestic and international, cost per trip, per diem and other related travel costs. These costs should be budgeted only for Manila-based staff. EDC will cover travel, transportation and per diem of the field-based assessors.

Equipment and Supplies: This category is for supplies and equipment. Costs must be broken down by types and units.

Subcontracts: For any proposed subcontract, the Offeror must submit:

- A budget and budget narrative for the proposed subcontract and the budget must be formatted in accordance with the budget categories in this section;
- An Organizational Information and Certification Form, which is included as Annex A to this RFP, completed by the proposed subcontractor;
- A document explaining the work which is proposed to be completed by the proposed subcontractor, how the Offeror will oversee and monitor the proposed subcontractor’s work, and the reason why the proposed subcontract is necessary for the efficient achievement of the deliverables.

Allowances: Allowances should be broken down by specific type and by person, and should be in accordance with Offeror’s policies and US Government regulations.

Training: For all types of training, costs should be broken down by types of training, participants and types of costs (e.g. transportation, materials, facilities, etc.).

Other Direct Costs: Costs must be broken down by types and units.

Indirect Costs: If the Offeror has a Negotiated Indirect Cost Rate Agreement, indirect costs must be proposed in accordance with the Offeror’s Negotiated Indirect Cost Rate Agreement and a copy of the Negotiated Indirect Cost Rate Agreement must be included in the cost proposal. If indirect costs rates have not been previously established with the US Government, a breakdown of bases, pools, method of determining the rates and description of costs, and two years of financial statement, preferably audited by an independent auditor must be submitted.

Fee/Profit: The proposed fee/profit must be supported with rationale based on associated risk factors.

6. Contract Type and Payment

One or more fixed price contracts may be awarded in response to this RFP. The payment schedule for any resultant contract is anticipated to be as follows:

Deliverable Number	Deliverable (reference “Deliverables Table in Section 4.1.2)	Payment Amount
1	Final Workplan Approval	15%
2	Approval of Recommended List of Assessors, Team Leaders and Supervisors	15%
3	Attendance Sheet from LAT-K Training	20%
4 and 5	LAT-K Administration Data Uploads and Final Report and Invoice Submission	50%

EDC reserves the right, at its sole discretion, to revise the payment schedule before issuance of a contract. EDC further reserves the right to require the Offeror to provide a performance security or a bank guarantee.

7. Organizational Information and Offeror Certification

In order for their proposal to be considered, the Offeror must complete and submit the Organizational Information and Certification Form, which is included as **Annex C** to this RFP, and submit all the attachments required by the form.

Annex A—List of Required Components for Proposal

Please include this checklist in the Proposal.

Name of Offeror:

Items to be included in the Technical Proposal	Please check below to indicate that you have included this component in your Technical Proposal.	Please list the location, by document name and page number, in the Technical Proposal of this information.
Organizational Capacity Statement in accordance with Section 5.1 of this RFQ		
A Draft List of Qualified Professional and Technical personnel proposed, and each of their CVs in accordance with Section 5.1 of this RFQ		
In accordance with Section 5.1 of this RFQ, a description of work of similar or larger size and scope, and minimum of two examples of this work, shared via weblink, portfolio, or as a virtual tour		
Draft Work Plan in accordance with Section 5.1 of this RFQ detailing responsibilities, timeline, and steps to accomplish each deliverable		

Items to be included in the Price Proposal	Please check below to indicate that you have included this component in your Price Proposal.	Please list the location, by document name and page number, in the Price Proposal of this information.
Completed Annex A—List of Required Components for Proposal		
Warranty in accordance with Section 4.1.4 of this RFQ		
Price Quotation submitted in a separate email, post mail or hand delivered and clearly identified as the Price Quotation in the format required by Annex B—Price Proposal Template		
Completed and signed Annex C—Organizational Information and Certification Form		
Completed and signed Annex D – U.S. Firms Only – Business Size Self-Certification Form		

Annex B— Illustrative Price Quotation Template

Exchange Rate: _____

Price Summary	Rate in Php	Rate in USD	Unit Type	# of Units	Amount (Php)	Amount (USD)
Direct Labor						
Salary and Wages						
<i>Project Manager (PM) - full name</i>			month			
<i>Supervisors (5) – full names</i>			month			
<i>Team Leaders (16)</i>			day			
<i>Core Assessors (64)</i>			day			
<i>Buffer Assessors (16)</i>			day			
Fringe Benefits (itemized)						
TOTAL DIRECT LABOR						
Other Direct Costs						
Travel, Transportation, Per Diem and Miscellaneous Costs for Manila-based staff						
<u>LAT-K Training (site TBD)</u>						
Project Manager (Manila)						
<i>roundtrip airfare (Manila-Laoag) for PM</i>			round trip			
<i>taxi to/from airport - Manila for PM</i>			round trip			
<i>Taxi to/from airport – Laoag for PM</i>			Round trip			
<i>lodging (PM) - Laoag</i>			day			
<i>per diem</i>			day			
Supervisors (5) – only if Manila-based staff						
<i>roundtrip airfare</i>			round trip			
<i>taxi to/from airport</i>			round trip			
Team Leaders (16) – only if Manila-based staff						
<i>Ground transport to/from LAT-K Training site</i>			round trip			
Allowances						
<i>allowance #1 – description (e.g. mobile load)</i>	-	-	day			
Equipment and supplies						
Assessors						
<i>notebooks</i>			each			
<i>pens</i>			each			
TOTAL OTHER DIRECT COSTS						
Indirect Costs (%)						
Total Cost (Direct Labor Plus Other Direct Costs Plus Indirect Costs)						
Fee/Profit (%)						
Total Price (Total Cost Plus Fee/Profit)						

Annex C—Organizational Information and Certification Form

The Offeror must ensure that this form is duly completed and correctly executed by an authorized officer of the Offeror's company.

A1. Organizational Information

Full legal name of the Offeror's company: _____

Year the Offeror's company was established: _____

Contact information regarding the proposal:

- (a) Individual's full name and title: _____
- (b) Full office address: _____
- (c) Telephone number: _____
- (d) Fax number: _____
- (e) Email address: _____

Offeror's Dun & Bradstreet Number¹: _____

The Offeror certifies, by checking the applicable box(es), that:

- The Offeror is a **non-U.S. entity** and it operates as:
 - a corporation organized under the laws of _____ (country name),
 - an individual,
 - a partnership,
 - a nongovernmental nonprofit organization,
 - a nongovernmental educational institution,
 - a governmental organization,
 - an international organization, or
 - a joint venture.

- The Offeror is a **U.S. entity** and it operates as:
 - a corporation incorporated under the laws of the State of _____ (state name),
 - an individual,
 - a partnership,
 - a nongovernmental nonprofit organization,
 - a state or local governmental organization,
 - a private college or university,
 - a public college or university,
 - an international organization, or
 - a joint venture.

A2. References

Please list the names, email addresses, phone numbers, and contact people at three organizations to which the Offeror has provided services of a similar or larger size and scope during the last 24 months, whom EDC can call on as references, and a description of the services provided to each organization. It is

¹ Offerors that currently have a Dun & Bradstreet Number are requested to provide this information. Offerors who are not registered with Dun & Bradstreet may do so at <http://fedgov.dnb.com/webform>. There is no charge for this registration. A Dun & Bradstreet Number is not required for submission of a proposal, but may be required before a contract is issued. Whether or not an Offeror currently has a Dun & Bradstreet number will not affect the evaluation of the Offeror's proposal.

recommended that the Offeror alert the contacts that their names have been submitted and that they are authorized to provide performance information if requested by EDC.

Reference #1:

Organization Name: _____
Contact Person: _____
Email Address: _____
Telephone Number: _____
Type of Services Provided: _____
Value of the Services Provided: _____
Month and Year During Which Services were Provided: _____

Reference #2:

Organization Name: _____
Contact Person: _____
Email Address: _____
Telephone Number: _____
Type of Services Provided: _____
Value of the Services Provided: _____
Month and Year During Which Services were Provided: _____

Reference #3:

Organization Name: _____
Contact Person: _____
Email Address: _____
Telephone Number: _____
Type of Services Provided: _____
Value of the Services Provided: _____
Month and Year During Which Services were Provided: _____

A3. Incorporation, Registration, and Litigation

The following documents must be included in your proposal.

Documentation showing the Offeror's current legal incorporation in the country in which it is incorporated:

Attached

A copy of the Offeror's currently active registration in the Philippines, demonstrating that the organization can legally operate in the Philippines, *if the Offeror will complete any work under a contract resulting from this RFP in the Philippines.*

Attached

Offeror certifies that it will not complete any work under a contract resulting from this RFP in the Philippines and further certifies that it can legally operate in the country(ies) in which all work under a contract resulting from this RFP will take place.

Information regarding any current lawsuits, legal proceedings, court cases, or other litigation in which the Offeror, or any of the entities in the collaboration, are involved, regardless of jurisdiction where the litigation resides.

Attached

Offeror certifies that it is not currently involved in any lawsuits, legal proceedings, court cases, or other litigation.

A4. Key Individuals

The names and titles of the Offerors’ key individuals are:

- (a) the principal officers of the organization’s governing body (e.g., chairman, vice chairman, treasurer and secretary of the board of directors or board of trustees): _____
- (b) the principal officer and deputy principal officer of the organization (e.g., executive director, deputy director, president, vice president): _____
- (c) the program manager(s) for the proposed contract: _____
- (d) any other person who will have significant responsibilities for administration of the US Government-financed activities or resources under the proposed delivery of the services: _____

A5. Awareness and Agreement to the Content of this RFP

By signing this form, the Offeror attests to its awareness and agreement to the content of this RFP and all accompanying calendar schedules and terms and provisions contained herein, including but not limited to the payment terms in Section 6.

A6. Compliance With Applicable Laws and Regulations

By signing this form, the Offeror agrees to comply with all applicable U.S. federal laws and regulations including those governing affirmative action, E-Verify, equal employment opportunity, use of human participants in research, disabilities, prohibitions against supporting terrorism, prohibitions on human trafficking and prohibitions against discrimination, and, if the value of the contract resulting from this RFP is \$10,000 or more, Executive Order 13496, Notification of Employee Rights Under Federal Labor Laws, see 29 CFR Part 471, Appendix A to Subpart A. Offeror hereby certifies that it is not delinquent on any State or Federal tax. Offeror will cooperate with EDC in its efforts to comply with all laws, regulations and any award terms and conditions imposed by EDC by the sponsor(s) of this project.

A7. Debarment and Suspension

The Offeror further certifies that their firm (check one):

- IS
- IS NOT

currently debarred, suspended, or proposed for debarment by any United States federal entity. The undersigned agree to notify EDC of any change in this status, should one occur, until an award has been made under this procurement action.

A8. Proposal Validity

This proposal is submitted in response to an RFP issued by EDC. The undersigned is a duly authorized officer and hereby certifies that:

(Offeror Name)

agrees to be bound by the content of this Technical and Cost Proposal and agrees to comply with the terms, conditions and provisions of the referenced RFP. The proposal shall remain in effect for a period of 120 calendar days as of the Due Date of the RFP.

A9. Authorized Negotiators

Person[s] authorized to negotiate on behalf of this firm for purposes of this RFP are:

Name:	_____	Title:	_____
Signature:	_____	Date:	_____
Name:	_____	Title:	_____
Signature:	_____	Date:	_____

A10. Signature

Signature of Authorized Officer:

Name: _____ Title: _____
Signature: _____ Date: _____

Annex D—Business Size Self-Certification – to be completed by U.S. Businesses Only

Section 1. Organization Information

Company Name: _____ Dun & Bradstreet No (optional)*: _____
Address: _____ *Registration with Dun & Bradstreet is offered as a no-charge service. To register,
City / State / Zip: _____ please go to http://www.dnb.com/us/duns_update/ .
Contact Person: _____
Phone and Fax Number: _____ Email Address: _____
NAICS Code(s) to be utilized: 541720 Research and Development in the Social Sciences and Humanities

Section 2. Certification as a Non-Profit Organization

Are you a non-profit organization? Yes No

If you have checked "yes" above, do not complete Sections 3 or 4, please skip directly to Section 5.

Section 3. Business Size Representation:

- Small Business (SB), includes sole proprietorships – see definitions on page 2, and complete Section 4
- Large Business (LB) – do not complete Section 4

Section 4. Small Business Sub-Classification Representation – please check all that apply

- Small Disadvantaged Business (SDB) (self certification)
- HUBZone Small Business (requires formal certification, for additional information please go to the Small Business Administration website <https://www.sba.gov/contracting/government-contracting-programs/hubzone-program/applying-hubzone-program>)
- Woman Owned Small Business (WOSB) (self certification)
- Veteran Owned Small Business (VOSB) (self-certification)
- Service Disabled Veteran Owned Small Business Concern (SDVOSP) (self-certification)
- Alaska Native Corporation (ANC)
- None of the above

If you hold a certification not listed above (e.g. a state issued Minority Business Certification) please add your certification information on the line below:

Notification: Under 15 U.S.C. 645(d), any person who misrepresents its firm's size status shall (1) be punished by a fine, imprisonment, or both; (2) be subject to administrative remedies; and (3) be ineligible for participation in programs conducted under the authority of the Small Business Act.

- I assert that my business complies with the Small Business Administration's Table of Size Standards. Reference <https://www.sba.gov/contracting/getting-started-contractor/make-sure-you-meet-sba-size-standards/table-small-business-size-standards> for additional information. (This is considered self-certification – see www.sba.gov for additional information)

Section 5. Vendor Execution Required

By signing this document, the vendor acknowledges all the details provided on the form are accurate, true and that the vendor has read and understands the information.

Authorized Representative Name/Title: _____

Signature of Authorized Officer: _____ Date: _____

Definitions:

Small Business (SB): The Small Business Administration (SBA), for most industries, defines a "small business" either in terms of the **average number of employees** over the past 12 months, or **average annual receipts** over the past three years. In addition, SBA defines a U.S. small business as a concern that: is organized for profit; has a place of business in the US; operates primarily within the U.S. or makes a significant contribution to the U.S. economy through payment of taxes or use of American products, materials or labor; is independently owned and operated; and is not dominant in its field on a national basis. The business may be a **sole proprietorship**, partnership, corporation, or any other legal form. In determining what constitutes a small business, the definition will vary to reflect industry differences, such as size standards (reference [NAICS \(www.census.gov/eos/www/naics/\)](http://www.census.gov/eos/www/naics/))

Sole Proprietorship: A sole proprietorship is the simplest and most common structure chosen to start a business. It is an unincorporated business owned and run by one individual with no distinction between the business and you, the owner. You are entitled to all profits and are responsible for all your business's debts, losses and liabilities. Learn more about sole proprietorships at the SBA website at <http://www.sba.gov/content/sole-proprietorship-0> .

Small Disadvantaged Business (SDB): A Small Disadvantaged Business (SDB) is a small business that is at least 51 percent owned by one or more individuals who are both socially and economically disadvantaged.

The SBA defines socially disadvantaged groups as those who have been, historically, subjected to "racial or ethnic prejudice or cultural bias" within the larger American culture. Identified groups include: African Americans, Asian Pacific Americans, Hispanic Americans, Native Americans and Subcontinent Asian Americans. Members of other groups may qualify if they can satisfactorily demonstrate that they meet established criteria.

Economically disadvantaged individuals are defined as those for whom impaired access to financial opportunities has hampered the ability to compete in the free enterprise system, in contrast to people in similar businesses who are not identified as socially disadvantaged.

HUBZone Small Business - Historically Underutilized Business Zone: A small business concern that appears on the list of [Qualified HUBZone Small Business](#) maintained by the US Small Business Administration. To determine if your business is located in a HUBZone, or to apply online, go to [HUBZone \(https://eweb1sp.sba.gov/hubzone/internet/index.cfm\)](http://www.sba.gov/hubzone/internet/index.cfm) .

Woman-owned Small Business (WOSB): A small business that is at least 51 percent owned and actively managed by one or more women with either U.S. citizenship or U.S. resident alien status. Learn more at SBA's Office of Women's Business Ownership ([OWBO \(http://www.sba.gov/aboutsba/sbaprograms/onlinewbc/index.html\)](http://www.sba.gov/aboutsba/sbaprograms/onlinewbc/index.html)) .

Veteran-Owned Small Business (VOSB): A small business concern that is:

- i. At least 51% unconditionally owned by one or more veterans as defined at 38 U.S.C. 101(2) or, in the case of any publicly owned business, at least 51% of the stock of which is unconditionally owned by one or more veterans; and
- ii. The management and daily business operations of which are controlled by one or more veterans.

Learn more at SBA's Office of Veterans Business Development ([OVBD \(http://www.sba.gov/aboutsba/sbaprograms/ovbd/index.html\)](http://www.sba.gov/aboutsba/sbaprograms/ovbd/index.html)).

Service Disabled Veteran-Owned Small Business Concern (SDVOSB): A small business concern that is:

- i. At least 51% unconditionally owned by one or more service-disabled veterans or, in the case of any publicly owned business, at least 51% of the stock of which is unconditionally owned by one or more service-disabled veterans, and;
- ii. The management and daily business operations of which are controlled by one or more service disabled veterans, or in the case of a service disabled veteran with permanent and severe disability, the spouse or permanent caregiver of such veteran.

"Service Disabled Veteran" means a veteran, as defined in 38 U.S.C. 101(2), with a disability that is service connected as defined in 38 U.S.C. 101(16). Learn more at the [U.S. Department of Veterans Affairs \(http://vabenefits.vba.va.gov/vonapp/main.asp\)](http://vabenefits.vba.va.gov/vonapp/main.asp) .

NAICS: The North American Industry Classification System (NAICS) is the standard used by Federal statistical agencies in classifying business establishments for the purpose of collecting, analyzing, and publishing statistical data related to the U.S. business economy. For more information go to [NAICS \(www.census.gov/eos/www/naics/\)](http://www.census.gov/eos/www/naics/).

Annex E—EDC Per Diem Guidelines

For travel that requires overnight stays, EDC reimburses service providers/consultants for business-related travel and lodging costs upon submission of original, signed supporting receipts according to the established local per diem policy.

Per diem is an established amount of money that allows for lodging, as well as meals and incidental expenses (M&IE).

Per Diem Table

Locality	Maximum Lodging Amount	M&IE Rate	Maximum Per Diem Rate
Manila	3,000.00	1,100.00	4,100.00
All Others	2,500.00	1,000.00	3,500.00

The Meals and Incidental Expenses (M&IE) are broken down as follows:

Breakfast:	20%
Lunch:	30%
Dinner:	30%
Incidentals:	20%

Accommodations. Per diem rates listed in the table for overnight lodging reflect the maximum amount allowed. Original/Official, signed receipts for overnight accommodations are required for reimbursement. Actual costs may not exceed the rates referenced in this Annex. *Accommodations reimbursement is not provided for travel within a person’s home area or base station. Home area is identified as person’s place of an established or permanent residence.*

Meals and Incidental Expenses. Reimbursement for M&IE is provided at the established per diem rate for all overnight field trips at the rate of 75% of per diem per day for the first and last day, regardless of the time of travel, and 100% for any day in between. Weekends are also entitled to per diem, if work is authorized to be performed. Receipts are not necessary for M&IE reimbursements.

Other guidelines:

- For day trips where the travel time is 12 hours or more and with a distance of at least 30km one way, or 60 km round trip, M&IE is provided at 75% of the established per diem rate. For day trips, where the duration and distance of travel are less than the above, per diem is not provided;
- When lunch is packaged and paid for by EDC, to which the person is counted, the person’s per diem will be reduced by the M&E rate for lunch, i.e. 30%;
- When a person is on travel status in her/his home area or at the place of his or her permanent residence, the person will be entitled to only 40% of the M&IE rate during weekdays. This M&IE rate will be reduced by 20% if lunch is packaged to which the person is counted;
- No M&IE will be paid to the person for weekends at his/her home area, unless he or she is authorized to work.