



# Request for Proposals Blanket Purchase Agreement (BPA)

## Summary

IBI seeks qualified, eligible non-governmental organizations and private companies (“offerors”) to fulfill future needs for services to support USAID-funded Haiti “Evaluation and Survey Services Plus” (ESS+) Activity. Interested parties should respond to this solicitation which intends to select a short-list of qualified firms who will be eligible to submit proposals for future monitoring, evaluation, and learning (MEL) related tasks under ESS+.

Successful offerors will be entered into the IBI’s standard Blanket Purchase Agreement(s) (“BPA”) terms. IBI may later issue Call Orders (“Orders”) when a new MEL task is initiated, on competitive or non-competitive basis to BPA holders to submit a brief proposal for specific services. This contract mechanism will allow IBI to procure anticipated MEL services from the short-listed firms to allow for streamlined, efficient procurement.

## Solicitation Details

Solicitation Number:	BPA-2023-01-0001
The Buyer:	International Business Initiatives (IBI)
The Project:	7200AA20D000026/72052122F00001 “Evaluation and Survey Services Plus” (ESS+)
The Buyer’s Client:	U.S. Agency for International Development (USAID)
Deadline for Questions:	June 23, 2023, 5pm EST
Offer Deadline:	July 17, 2023, 5pm EST

Inquiries and offers should be directed to the following contact:

[proposals@Haiti-ESSplus.com](mailto:proposals@Haiti-ESSplus.com)

## **Part 1: Background & Requirements**

### **1.1 Background**

IBI is a U.S.-based private company, which primarily implements contracts and grants for the U.S. Agency for International Development (USAID).



IBI was awarded contract No. 7200AA20D000026/72052122F00001 "Evaluation and Survey Services Plus" (ESS+) Activity funded by USAID in August 2022. This four-year contract aims to provide technical and advisory services to USAID in three core components: 1) Evaluation and Survey Support including performance, impact, development or other types of evaluations, baseline and end-line surveys, assessments or other analyses; 2) Capacity Building & Learning Events; and 3) In-country Third Party Monitoring (TPM) of USAID activities. Through these activities, ESS+ assists USAID/Haiti to make evidence-based decisions aimed at improving U.S. development assistance in Haiti.

USAID has a demonstrated history working in Haiti and currently manages over 70 activities and projects across the country. USAID/Haiti's current Strategic Framework (SF), operational since December 2020, has three Development Objectives (DOs) outlining its approach to achieving the following strategic goal: having Haitians more engaged in creating and sustaining a more resilient, prosperous, and democratic future. USAID/Haiti is currently operating in seven technical sectors:

1. Democracy, Human Rights and Governance (DRG)
2. Education
3. Health (including Nutrition)
4. Economic Growth and Agricultural Development (EGAD)
5. [Office of] Infrastructure, Energy, and Engineering (OIEE) which includes Water and Sanitation
6. [Office of] Humanitarian Assistance (OHA)
7. Resilience and New Partnership Engagement (RNPE)

## **1.2 Requirements**

*Establish a Bench:* IBI seeks to award one or more BPAs to qualified non-governmental organizations and private companies that will allow a flexible and fast basis for issuing specific Orders for future activities. These BPAs will establish a "bench" or a roster of qualified, eligible, and responsive subcontractors capable of performing envisioned activities. Specific eligibility requirements are described in Section 1.5.

As USAID's activities are nationwide, the offerors should expect to support tasks located anywhere in Haiti including in non-permissive and hard to reach areas. Offers are requested to provide support services under following ESS+ Activity Components:

Component 1: Evaluation and Survey Support

Component 3: In-country Third Party Monitoring (TPM) of USAID activities including TPM for Health Activities.

Under Component 1, IBI requests support for evaluations, assessments, surveys, studies and research, with a focus on collecting rigorous high-quality data.

Depending on the task and the capacity of the offerors, the role of the BPA recipient under component 1 may include the following:

- **Supporting performance evaluations, assessments and studies, and baselines and endline surveys.** This includes the possibility of undertaking the full exercise from design to reporting and dissemination of results.

- **Provision of key team members on evaluation or study teams.** This may include Team Leaders or Team Members with expertise in various evaluation methodologies and/or research experience in relevant subject areas.
- **Data collection** for mid-term and final performance, impact, developmental or other types of evaluations, and to support other research and analyses, including but not limited to public opinion polls, economic studies, and contextual analysis, including large scale surveys, computer assisted telephone interviews (CATI), geo-referenced data, and qualitative data collection (such as key informant interviews or focus group discussions). This may require the full range of support including instrument design, tool programming, ethical clearance, pre-testing, training of data collection staff, pilot testing, data collection, management of appropriate software, and quality assurance.
- Other MEL related tasks.

Under Component 3, ESS+ provides TPM services for various USAID technical offices, enabling them to effectively manage their activities, integrate evidence from field monitoring into planning, and provide timely information for decision making. TPM services help USAID to better understand the complex Haitian development context (including institutional norms and behaviors affecting project results). TPM services may include:

- Assessing activity/project implementation progress and quality.
- Assessing progress towards strategic goals or development or humanitarian outcomes.
- Consulting with/ collecting feedback from beneficiaries/participants, partners, and other stakeholders.
- Conducting rapid assessments in areas hit by natural disasters.
- Conducting monitoring assessments of humanitarian assistance programs implemented under a disaster declaration.
- Monitoring the context or local operating environment.
- Monitor the implementation of activity environmental mitigation and monitoring plans (EMMPs).

Depending on the task and the capacity of the offerors, the role of the BPA recipient under component 3 may include the following:

- Recruit, train, and manage field monitors and field supervisors who maintain a constant presence in the field in selected areas.
- Recruit other TPM Team Members with expertise in various design methodologies and/or research experience in relevant subject areas.
- In consultation with ESS+, develop, refine and test templates, tools, protocols, and procedures to collect high-quality data relevant for decision making, unique to specific interventions, geographic areas, or other criteria.
- Use an electronic system for collecting, storing, and reporting site visit data and findings as agreed to with ESS+.
- Plan and conduct monitoring visits in specific geographic regions in coordination with ESS+ and the implementing partners to be monitored. Types of site visits include regular activity monitoring, emergency assessments, output verification, data verification, outcome monitoring, direct observation (including taking photos), context monitoring, and gathering beneficiary and stakeholder feedback. Data collection methods include desk review, qualitative data collection (such as key informant interviews or focus group discussions), mini surveys, computer assisted telephone interviews (CATI), geo-referenced data, observations/inspections, taking pictures and



making videos among others type of verifications necessary to validate and verify project and activity deliverables.

- Analyze data and produce summary reports in English for the visits conducted, focusing on the specific TPM objectives, and using the reporting template and guidance provided by ESS+.
- Other MEL related tasks.

Specific requirements will be determined as opportunities are assigned by USAID and will be communicated to short-listed organizations in subsequent Orders.

### **1.3 Award Details: Blanket Purchase Agreement**

*Type:* Any award made pursuant to this solicitation will be in the form of a Blanket Purchase Agreement (BPA). A BPA is an agreement that establishes terms and conditions for future Orders issued by IBI. While the BPA in itself is not a contract and does not obligate any money, Orders awarded by IBI under the BPA will be individual contracts. IBI will issue a Request for Quotation for services and BPA holders will respond with a quotation. Orders will be either Firm Fixed Price or Time & Materials.

IBI is implementing a prime contract for the U.S. Government which requires that certain terms and conditions from IBI's contract would be included in all subcontracts. Any Orders awarded under the BPA are subcontracts subject to these special terms in addition to general terms and conditions.

*BPA Award Duration:* The planned BPA duration is 14 months from the award date, with the option for renewal. During this period, IBI will issue Orders to the short-listed firms/BPA holders. An Order may require performance beyond this period, as detailed in any subsequent Order and agreed with IBI.

*Award Timeline:* IBI intends to award BPA(s) to selected firms by July 31, 2023.

### **1.4 Legal Notes**

- The Solicitation:
  - IBI may amend, extend, or cancel this solicitation at any time, or fulfill its requirements through other processes at its discretion.
  - IBI may decline to review offers containing errors or omissions.
  - This solicitation does not obligate IBI to award an agreement to any offeror.
- Offers:
  - IBI will not pay for any cost incurred in the preparation and submission of an offer in response to this solicitation.
  - Offeror warrants that its offer, and any data contained in its offer does not contain third party intellectual property to which the offeror does not have rights.
  - Offeror is fully responsible for any data submitted as part of its offer and for the proper transmission of the offer.
- Offerors:
  - Offerors must disclose any conflict of interest, whether actual or perceived, that may result from the offeror performing the service for IBI. IBI may consider reasonable mitigation plans.

- Potential offerors and their officers, employees, and agents must not engage in any collusive, anti-competitive conduct or any similar conduct with any other offeror.
- Offerors must disclose the assistance of any former employee of IBI if such individual has assisted with the preparation of the offer having recently left IBI within 12 months. Offerors are warned that such assistance may preclude their offer from consideration.
- By submitting a proposal, offerors warrant that they have not provided or offered any payment, gift, gratuity, item or other consideration to the IBI, its officers, employees, or agents, or any other individual engaged in the decision-making process relating to this solicitation, which could influence the outcome of this solicitation or any other dealings between IBI and offeror. Any such conduct discovered by IBI will immediately disqualify the offeror from participating in this procurement.
- Awards: BPA is not a contract – IBI is not obligated to issue any Orders and reserves the right to compete or award sole source offers to BPA holders, or procure similar services outside the BPA mechanism.

### **1.5 Eligibility**

Offerors must meet the following minimum eligibility requirements:

1. Be a private company or non-governmental organization with established operations in Haiti as follows:
  - a) Maintained continuous operations in Haiti for at least two years;
  - b) Dedicated local office with Haitian staff comprising at least 50% of personnel;
  - c) Active business registration and active bank account in Haiti.
2. Have or be able to obtain via SAM.gov a Unique Entity Identifier (UEI) number before an award of the first Order under the BPA;
3. Be financially stable and have adequate financial resources (or the ability to obtain such resources) as necessary during the performance of the BPA;
4. Have the necessary management systems and ability to meet required management standards, including the processes and systems necessary to meet the reporting requirements and data security and protocols to ensure the quality of information and its management and dissemination;
5. Must not have no active exclusion in the SAM (<http://www.sam.gov>) or on a UN prohibited parties list;
6. Must not appear on the (SDN) and Blocked Persons for the Office of Foreign Assets Control (OFAC);
7. Must not be on the United Nations Security Council (<https://www.un.org/securitycouncil/content/un-sc-consolidated-list> ) Consolidated List of Sanctions.

## Part 2: Offer

### **2.1 Offer Contents**

The following items are required to be submitted as part of the offer:

1. Cover letter containing:
  - Eligibility Statement describing compliance with eligibility requirements. This statement must also include name of the company, President, CEO and controlling owners (including ultimate beneficial owners).
  - Responsibility Statement stating that the offeror company is in good business standing, has no record of default or negative past performance, and has ability to obtain resources to perform services under the BPA resulting from this solicitation.
  - Offer validity period.
2. Technical Proposal

Both must be submitted by the due date and time indicated in the Solicitation Details section to the contact listed. PDF or MS Word document format must be used for submissions. If you do not receive email confirmation of receipt, please contact the point of contact listed. The subject line of proposal submission emails must reference the solicitation number.

### **2.2 Instructions for the Contents of the Technical Proposal**

The Technical Proposal is limited to seven pages, excluding Annexes. IBI will not assess any information submitted above the page limit. Proposals must be submitted in English, standard letter sized (8.5” x 11” or 216mm x 297mm), single spaced, Times New Roman font not less than 11 points in size, with page margins of at least 1”.

#### ***2.2.1 Executive Summary***

The technical proposal should include a concise summary (no more than a 1 page in length) of the offeror’s relevant experience and capacity in one or more of the ESS+ task areas defined in sections 1.2 and 2.2.2.

#### ***2.2.2 Institutional Capacity***

The technical proposal must demonstrate the offeror’s institutional capacity to carry out projects in one or more of the following task areas:

- Design and implementation of evaluations (e.g., performance, whole-of-project, impact), studies, and/or research in relevant subject areas, such as:
  - Security and justice
  - Democracy and governance
  - Economic development
  - Anti-corruption and transparency
  - Education
  - Health

- Agriculture and food security
- Environment and infrastructure
- Water and sanitation
- Humanitarian Assistance
- Resilience
- Gender and youth
- Data Collection, including:
  - Large scale surveys
  - Quantitative data collection
  - Qualitative data collection (e.g., key informant interviews, focus group discussions)
  - Instrument design, ethical clearance, training of data collection staff, pre-testing, pilot testing, data collection, quality assurance, management of appropriate software, and data management
  - Computer Assisted Telephone Interviews (CATI), Computer Assisted Web Interviews (CAWI), and Pen and Paper Personal Interviews (PAPI)
  - Data collection in complex, high crime, or other types of hard to reach, restrictive and non-permissive environments.
- Design and Implementation of TPM data collection processes in relevant technical sectors including:
  - Democracy, Human Rights and Governance (DRG)
  - Education
  - Health (including Nutrition)
  - Economic Growth and Agricultural Development (EGAD)
  - Infrastructure, Energy, and Engineering (OIEE) which includes Water and Sanitation
  - Humanitarian Assistance (OHA)
  - Resilience and New Partnership Engagement (RNPE)
- Other MEL related tasks and expertise

Offers should demonstrate that they have sufficient institutional capacity, including in the areas of financial management, administration, project management and human resources, to carry out the tasks described in this RFP. This section of the proposal does not need to reference specific past performance or project or highlight individual key staff, as those will be included in sections 2.2.3 and 2.2.4.

### ***2.2.3 Past Performance Information***

Offerors must demonstrate a satisfactory record of past performance, including a satisfactory track record of meeting the performance objectives expected in previous engagements. Experience with USAID programs is preferred, but successful experience with other development programs is acceptable.

As an Annex to the technical proposal, past performance information must be provided for at least three previous assignments in the one or more of the technical areas defined in section 2.2.2. The offeror's experience may be national, regional, departmental, municipal or at the community level and must include following:

- a) Description of the assignment and relevancy to the proposed areas of experience/expertise
- b) Name of the funding agency/client

- c) Period of performance
- d) US Dollar value of work
- e) Type of contract mechanism
- f) Client reference contact information

The offerors must use the past performance template form included in Annex A.

### ***2.2.3 Organizational Structure & Key Personnel***

The offeror should outline the organizational structure and describe how the organization manages staffing for activity implementation in the proposed area(s) of expertise.

The offeror must propose and provide CVs for two or more key personnel. Each CV should be no longer than 5 pages and must be included as an Annex to the technical proposal. Key personnel should have at least five years of demonstrated successful experience in at least one task area.

Illustrative key personnel qualifications:

#### **TECHNICAL EXPERT**

- Education and special skills:
  - University degree in related technical field, such as engineering, economics, business, or social studies, with postgraduate studies in social and economic research, development cooperation, or other fields related to the evaluation of development programs.
  - Full professional proficiency in French and English.
- Professional experience
  - At least 10 years of professional experience in the related sector.
  - At least five years of highly relevant experience in proposed task area(s).

## **Part 3: Evaluation Basis**

### **3.1 Evaluation Basis**

The Offeror should note that the evaluation factors presented below will (1) serve as a standard against which IBI will evaluate all offers; (2) serve to identify the significant matters that the offeror should address in its offer; (3) reflect the requirements of this RFP.

The IBI will evaluate offers on the basis of:

1. Offeror Institutional Capacity: will be evaluated based on the institutional capacity to manage tasks of similar size, scope, and complexity to the proposed areas of experience/expertise.
2. Offeror Past Performance: will be evaluated on demonstration of successful completion of at least three relevant projects in at least one task area and adherence to the past performance instructions provided in this RFP.



3. Offeror Staffing Approach and Key Personnel: will be evaluated based on the organizational structure, proposed staffing approach, and technical and management qualifications of the key personnel. Key personnel should have at least five years of demonstrated successful experience in at least one task area.

Following rating criteria will be used to evaluate proposals:

<b>Rating Criteria</b>	
Exceptional	Exceeds specified minimum performance and capability requirements in a way that is beneficial to IBI. A proposal must have more than one strength and no deficiencies to receive an "exceptional" rating.
Good	Exceeds specified minimum performance and capability requirements. A proposal must have one or more strengths and no deficiencies to receive a "good" rating.
Acceptable	Meets specified minimum performance or capability requirements. A proposal must have no deficiencies to receive an "acceptable" rating.
Marginal	There is doubt regarding whether an aspect of the proposal meets specified minimum performance or capability requirements, but any such uncertainty may be correctable.
Unacceptable	Fails to meet specified performance or capability requirements. The proposal has one or more deficiencies and is not correctable.

BPA(s) will be made to the eligible and responsible offeror(s) whose offer(s) meet minimum performance and capability requirements.

### **3.2 Due Diligence**

Successful offerors must undergo a due diligence review by IBI before they can receive an Order. Offerors will be required to provide information sufficient to allow the IBI to determine it to be “responsible” (*willing* and *able* to perform, have satisfactory references, suitable financial resources and capabilities, integrity, and be otherwise qualified and eligible under applicable laws and regulations).

## **Part 4: Attachments**

The following attachments are considered integral to this solicitation:

- Past performance information form

**ANNEX A**

**Past Performance Information**

**[ONE FORM TO BE COMPLETED BY THE OFFEROR FOR EACH PAST PERFORMANCE EXAMPLE]**

1. FUNDING AGENCY OR ORGANIZATION:
2. TYPE OF CONTRACT OR COOPERATIVE AGREEMENT (FIRM FIXED PRICE, TIME & MATERIALS, COST REIMBURSEMENT, ETC.):
3. DATE OF AWARD: STATUS: ACTIVE _____ COMPLETED _____ AWARD COMPLETION DATE (INCLUDING EXTENSIONS):
4. VALUE OF WORK (USD):
5. DESCRIPTION OF THE ASSIGNMENT (SIZE, SCOPE, AND COMPLEXITY) AND RELEVANCY:
6. CONTACT INFORMATION FOR CLIENT REFERENCE:  NAME AND TITLE: TELEPHONE NUMBER: E-MAIL ADDRESS: