

Request for Quote/Proposal (RFQ/RFP)

Modification 2 – Extend the Deadline of Submission

Commodity/Service Required:	Organizational Development Consulting Services
Type of Procurement:	Purchase Order
Type of Contract:	Fixed Price Contract
Term of Contract:	September to December 2024
Contract Funding:	USAID
This Procurement supports:	Improving Learning Outcomes in Asia (ILOA) Burma Higher Education System Strengthening Activity (BHES)
Submit Proposal to:	Melody Cacas (mcacas@rti.org)
Date of Issue of RFP:	14 August 2024
Date Questions from Supplier Due:	5 September 2024
Date Proposal Due:	11 September 2024
Approximate Date Purchase Order Issued to Successful Bidder(s):	September 2024

Method of Submittal:	
Electronic submission via email to Melody Cacas, mcacas@rti.org	
Respond via e-mail with attached document in MS Word / pdf format. The Bidder/Seller agrees to hold the prices in its offer firm for 60 days from the date specified for the receipt of offers, unless another time is specified in the addendum of the RFP/RFQ.	
Solicitation Number:	RFP-BHES-MGMTCON-2024-001

Attachments to RFP:

1. Attachment “A” – Commodity Specifications
2. Attachment “B” – Instructions to Bidders/Sellers
3. All PO Terms and Conditions are listed on our website at:
<https://www.rti.org/sites/default/files/rti-purchase-order-terms-and-conditions-v1.16.pdf>,
http://www.rti.org/files/PO_FAR_Clauses.pdf or for commercial items:
http://www.rti.org/files/PO_FAR_Clauses_Commercial_Items.pdf (hereinafter the “Terms”).
 Supplier’s delivery of products, performance of services, or issuance of invoices in connection with this purchase order establishes Supplier’s agreement to the Terms. The Terms may only be modified in writing signed by both parties.


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3040 Cornwallis Road ■ PO Box 12194 ■ Research Triangle Park, NC 27709-2194 ■ USA
Telephone 919.541.6000 ■ Fax 919.541.5985 ■ www.rti.org

All bidders/sellers are responsible to carefully review each attachment and follow any instructions that may be relevant to this procurement.

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 KEY QUESTIONS		VENDOR INFORMATION FORM <i>Please write your answers clearly and use additional paper if needed to provide <u>as much detail as possible</u> in your answers to these questions. More details and facts are always better than fewer details. We will attempt to verify the important facts you have listed below using our local personnel in and around the country. Where a question does not apply to your business context Indicate N/A)</i>
1	<i>Name of contact person</i>	
2	<i>Title or position of contact</i>	
3	<i>Phone Number(s) for contact</i>	
4	<i>E-mail address for contact</i>	
5	<i>Company name</i>	
6	<i>Company address</i>	<i>(Include physical location)</i>
7	<i>Primary business of company</i>	<i>(Attach certificate of Incorporation, VAT & Tax compliance certificate and TIN certificate)</i>
8	<i>Valid Business Permit</i>	
9	<i>Bank Details (Account Name, account number, Currency, Bank Name, Branch & Country, Swift Code)</i>	
10	<i>Describe the capacity of your firm</i>	<i>(Attach short company profile not more than 5 pages and product catalogue)</i>

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11	<p><i>Has the company been audited during the last calendar year (2023)?</i></p>	<p><i>(If so attach audited profit & loss /Income statement and Balance sheet Only for 2022 & 2023)</i></p>
12	<p><i>RTI Credit policy is within 30 days upon delivery.</i></p> <p><i>Is this payment term acceptable to your organization</i></p>	
13	<p><i>List the names and current contact information for three (3) references for us to contact about your performance.</i></p>	
14	<p><i>Describe any quality /service accreditations or dealerships that you have e.g. ISO.</i></p>	

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Attachment A

Commodity Specifications or Statement of Work

Statement of Work

Description of Activity/Service:

RTI International (RTII) is a global, independent research institute with almost 60 years of experience in creating and translating knowledge into practice. RTI has more than 5,000 staff in over 75 countries with expertise in at least 250 degree fields working to unlock value in eight practice areas including: health, education, energy, environmental sciences, and innovation ecosystems.

RTI has been working in Asia for more than 35 years, providing technical assistance, institutional strengthening, and program support on behalf of governments, foundations, and private-sector clients. Together with our local partners, we deliver science-based solutions and advisory and technical services to help countries across South and Southeast Asia achieve national, regional, and local goals—in health, education, economic growth, governance and public policy, and environmental management.

The goal of the Improving Learning Outcomes for Asia (ILOA) activity is to provide analytical and implementation support services to USAID missions in Asia and the Asia Regional Bureau (USAID/Asia) and to assist them with designing, implementing, and evaluating a full range of education programming, inclusive of early childhood education (ECE), early grade reading and mathematics, basic and secondary education, workforce development (WFD), and higher education (HE).

The USAID/Burma Higher Education System Strengthening (BHES) Activity has recently been approved under the ILOA project to be implemented through March 2027. The activity field office and staff will be based out of Bangkok, Thailand. BHES intends to utilize a locally led development approach to strengthen the non-state higher education sector in Burma by supporting alternative post-secondary education providers and ethnic Community/Junior Colleges.

As part of this activity, USAID has identified two organizations that are providing education services to Burmese youth during the crisis. In July and August 2023, RTI carried out a capacity assessment activity with each organization to determine their level of institutional development and readiness to receive and implement international grants from institutions such as USAID. The findings indicated that further development is needed.

Org 1 is a dynamic grassroots organization. They have successfully established a virtual university with established university professors. They have established partnerships worldwide and have recently registered as a US-based 501c3 organization but are awaiting full tax-exempt status.

Org 2 is, similarly, a nascent organization run by volunteers. They have developed a course aggregation platform to help students identify alternative higher education opportunities. They do not have official registration in any country, but there are other large-scale open learning platforms that could serve as models for how to structure the organization sustainably.

USAID would like to establish a grants program that allows these organizations to continue to improve and expand their education services. Before doing so, however, each organization needs some additional organizational development support that would allow them to absorb additional donor funding. Despite their different levels of maturity, these two organizations have been operating in a crisis mode, responding to needs that are constantly evolving. What started as an interim, emergency education solution is now starting to become a more permanent investment. Therefore, these organizations can benefit from an exercise in strategic planning, business planning, determining what type of NGO operating model is most appropriate in the long term, and how to plan for financial sustainability. The solutions will be different for each organization and should be flexible enough to provide a legal structure in the short term while also allowing them to maintain their autonomy and creative vision in the long term. Although registration in the USA is an option, US tax-exempt status (501c3) is not mandatory. Legal registration in Thailand or other regional hubs would also be worthwhile to explore.

Product or Service Expectations (both if applicable):

RTI is seeking management consulting services from a company that is experienced in creating non-profits internationally, in facilitating strategic planning exercises and in developing operational roadmaps towards implementation of the strategic plan. Experience working with higher-education institutions or online service providers would be an asset. The selected company will be chosen based on demonstrated experience with small businesses, NGO or University legal and operational set up, and preferably experience with the Burmese diaspora or supporting other refugees and migrants to establish legal entities in their host or third-party countries.

We anticipate that the service provider will be available soon after selection to deliver coaching plus two 5-day workshops in Thailand (Bangkok, Chiang Mai or Mae Sot). The service provider will be responsible for identifying the workshop location and organizing all direct costs for delivering the workshop and covering costs of the participants travel, lodging etc. There will also be a period of remote coaching to help the organizations follow up on their strategic plans developed during the workshop. Depending on the extent of the needs identified and the profile of the service provider, the period of coaching may constitute a modification to the period of performance and scope of the work.

Note that the budget proposal should be in the currency of the line item, and the bottom line converted into USD.

Activity 1: Technical and Organizational development workshop series

Carry out two 5-day, residential workshops—one for each organization--in Thailand to work on high level strategic planning, operational and technical best practices.

The workshop agenda will be similar for both organizations, but because Organization 1 is

slightly more mature, the offeror should be prepared to adapt the content appropriately after introductory activities with the organizations. The content should cover visioning around different types of organizational models, defining the organization's mission and brainstorming sources of funding. This would also include identifying possibilities, advantages and disadvantages for becoming registered organizations in Thailand, the USA or elsewhere. When seeking suitable options for legal status, the contractor should consider networking with other organizations supporting the Burmese diaspora, within the USA and elsewhere.

Anticipated budget inputs for each of the two sessions (subject to change or alternative recommendations by the offeror):

- Lodging and per diem for 12 NGO participants in Chiang Mai or Mae Sot for 6 days (two half days travel and 5 workshop days)
- Venue/meeting space rental for 5 days
- Local travel expenses for 10 people from 2 organizations —2-4 from Bangkok, 10 from Chiang Mai and remaining live in Mae Sot.
- Facilitator fee (subcontract or consultant contract) and related LOE, travel expenses, etc.

Activity 2: Follow-on coaching

Support the organizations for limited period of time after the workshop to follow up on strategic plans made during the workshop, particularly related to legal and financial matters.

Follow-on coaching would then be designed to support the second organization to develop the legal documentation needed for their specific case, and the first organization (already registered) to operationalize their strategic plan.

The offeror will propose a certain number of person days to work remotely to support the organizations during the coaching stage. Given uncertainty about the extent of the needs of the organizations, flexibility will be built in to allow for adjusting as necessary.

Note: Language of support coaching, facilitation is to be Burmese or English.

Deliverables, Timelines, Special Terms and Conditions:

Period of Performance Begins: 09 September 2024

First workshop for organization 1: 30 September 2024

Second workshop for organization 2: 07 or 14 October 2024

Coaching Plans and workshop report following each workshop: 18 October 2024

Coaching period: 09 September – 31 December 2025

Project Closure/Complete: 31 December 2025

Pricing

Item #	Quantity to be Purchased	Description of Preferred Commodity or Services Specifications	Unit of Measure	Unit Fixed Price (Each) BHT	Total Fixed Price (Each) BHT	Lead Time Availability (Number of Days)
1			Times	xxxx	Xxxxx	
2						
3					XXXX	
Total Value					XXXX	

By signing this attachment, the bidder confirms he has a complete understanding of the specifications and fully intends to deliver items that comply with the above listed specifications.

Signature:

Title:

Date:

Attachment “B” Instructions to Bidders/Sellers

1. **Procurement Narrative Description:** The Buyer (RTI) intends to purchase commodities and/or services identified in Attachment A. The Buyer intends to purchase the quantities (for commodities) and/or services (based on deliverables identified in a Statement of Work). The term of the Ordering Agreement shall be from Award Date to the Delivery date of the Offeror unless extended by mutual agreement of the parties. The Buyer intends to award to a single “approved” supplier based on conformance to the listed specifications, the ability to service this contract, and selling price. We reserve the right to award to more than one bidder. If an Ordering Agreement is established as a result of this RFQ/RFP, supplier understands that quantities indicated in the specifications (Attachment A) are an estimate only and RTI does not guarantee the purchase quantity of any item listed.
2. **Procuring Activity:** This procurement will be made by **Research Triangle Institute (RTI International)**, located at

Jl. Jend. Sudirman 9, Ratu Plaza Office Tower, 25th Floor
Jakarta
10270
Indonesia

(insert full address of the office)

who has a purchase requirement in support of a project funded by

USAID

(insert client's name)

RTI shall award the initial quantities and/or services and any option quantities (if exercised by RTI) to Seller by a properly executed Purchase Order as set forth within the terms of this properly executed agreement.

3. **Proposal Requirements.** All Sellers will submit a quote/proposal which contains offers for all items and options included in this RFQ/RFP. All information presented in the Sellers quote/proposal will be considered during RTI's evaluation. Failure to submit the information required in this RFQ/RFP may result in Seller's offer being deemed non-responsive. Sellers are responsible for submitting offers, and any modifications, revisions, or withdrawals, so as to reach RTI's office designated in the RFQ/RFP by the time and date specified in the RFQ/RFP. Any offer, modification, revision, or withdrawal of an offer received at the RTI office designated in the RFQ/RFP after the exact time specified for receipt of offers is “late” and may not be considered at the discretion of the RTI Procurement Officer. The Seller's proposal shall include the following:
 - (a) The solicitation number:
 - (b) The date and time submitted:
 - (c) The name, address, and telephone number of the seller (bidder) and authorized signature of same:
 - (d) Validity period of Quote:

- (e) A technical description of the items being offered in sufficient detail to evaluate compliance with the requirements in the solicitation. This may include product literature, or other documents, if necessary.
 - (f) If RTI informs Seller that the Commodity is intended for export and the Commodity is not classified for export under Export Classification Control Number (ECCN) “EAR99” of the U.S. Department of Commerce Export Administration Regulations (EAR), then Seller must provide RTI the correct ECCN and the name of Seller’s representative responsible for Trade Compliance who can confirm the export classification.
 - (g) Lead Time Availability of the Commodity/Service.
 - (h) Terms of warranty describing what and how the warranties will be serviced.
 - (i) Special pricing instructions: Price and any discount terms or special requirements or terms (special note: pricing must include guaranteed firm fixed prices for items requested.)
 - (j) Payment address or instructions (if different from mailing address)
 - (k) Acknowledgment of solicitation amendments (if any)
 - (l) Past performance information, when included as an evaluation factor, to include recent and relevant contracts for the same or similar items and other references (including points of contact with telephone numbers, and other relevant information)
 - (m) **Special Note:** *The Seller, by his response to this RFQ/RFP and accompanying signatures, confirms that the terms and conditions associated with this RFQ/RFP document have been agreed to and all of its attachments have been carefully read and understood and all related questions answered.*
4. **Forms:** Sellers (potential bidders or suppliers) must record their pricing utilizing the format found on Attachment “A”. Sellers must sign the single hardcopy submitted and send to address listed on the cover page of this RFQ/RFP.
5. **Questions Concerning the Procurement.** All questions in regards to this RFQ/RFP to be directed to
- Melody Cacas
- (insert name of procurement officer)*
- at this email address:
- mcacas@rti.org
- (insert email address of the procurement officer).*
- The cut-off date for questions is *(insert date)*.
- 5 September 2024

6. **Notifications and Deliveries:** Time is of the essence for this procurement. Seller shall deliver

the items or services no later than the dates set forth in the contract that will be agreed by both parties as a result of this RFQ/RFP. The Seller shall immediately contact the Buyer's Procurement Officer if the specifications, availability, or the delivery schedule(s) changes. Exceptional delays will result in financial penalties being imposed of Seller.

7. **Documentation:** The following documents will be required for payment for each item:
 - (a) A detailed invoice listing Purchase Order Number, Bank information with wiring instructions (when applicable)
 - (b) Packing List
 - (c) All relevant product/service documentation (manuals, warranty doc, certificate of analysis, etc.)
8. **Payment Terms:** Refer to RTI purchase order terms and conditions found in <https://www.rti.org/sites/default/files/rti-purchase-order-terms-and-conditions-v1.16.pdf> , [http://www.rti.org/files/PO FAR Clauses.pdf](http://www.rti.org/files/PO_FAR_Clauses.pdf), or [http://www.rti.org/files/PO FAR Clauses Commercial Items.pdf](http://www.rti.org/files/PO_FAR_Clauses_Commercial_Items.pdf). Payment can be made via wire transfer or other acceptable form. Sellers may propose alternative payment terms and they will be considered in the evaluation process.
9. **Alternative Proposals:** Sellers are permitted to offer "alternatives" should they not be able to meet the listed requirements. Any alternative proposals shall still satisfy the minimum requirements set forth in Attachment A Specifications.
10. **Inspection Process:** Each item shall be inspected prior to final acceptance of the item. All significant discrepancies, shortages, and/or faults must be satisfactorily corrected and satisfactorily documented prior to delivery and release of payment.
11. **Evaluation and Award Process:** The RTI Procurement Officer will award an agreement contract resulting from this solicitation to the responsible Seller (bidder) whose offer conforms to the RFQ/RFP will be most advantageous to RTI, price and other factors considered. The award will be made to the Seller representing the **best value** to the project and to RTI. For the purpose of this RFQ/RFP, price, delivery, technical and past performance are of equal importance for the purposes of evaluating, and selecting the "best value" awardee. RTI intends to evaluate offers and award an Agreement without discussions with Sellers. Therefore, the Seller's initial offer should contain the Seller's best terms from a price and technical standpoint. However, RTI reserves the right to conduct discussions if later determined by the RTI Procurement Officer to be necessary.

The evaluation factors will be comprised of the following criteria:

- (a) **PRICE.** Lowest evaluated ceiling price (inclusive of option quantities) .
- (b) **DELIVERY.** Seller provides the most advantageous delivery schedule.
- (c) **TECHNICAL.** Items/Services shall satisfy or exceed the specifications described in RFQ/RFP Attachment A.
- (d) **PAST PERFORMANCE** - Seller can demonstrate his/her capability and resources to provide the items/services requested in this solicitation in a timely and responsive manner.
- (e) **OTHER EVALUATION CRITERIA.**

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The Proposals will be evaluated in 3 Stages:

Stage 1: Mandatory Eligibility Requirements

At this stage the bids will be subjected to a preliminary examination to verify the overall completeness and responsiveness of the bids as received. Any bids that will be found to be incomplete, invalid or substantially unresponsive will be eliminated at this stage. To qualify for stage 2 evaluation, a vendor must meet the following Mandatory Eligibility Requirements:

Must submit copies of the following documents.

- Business Registration document.
- Valid Business Permit
- TIN certificate
- Unique Entity Identifier (UEI) ID (**Quick Start Guide for Getting a Unique Entity ID provided as a separate attachment to this email**)
- Completion of RTI's vendor information form.

Proposals not meeting the above requirements will be automatically disqualified.

Stage 2: Technical Evaluation (65 points)

The total technical points assigned to each proposal will be determined by adding and weighting the scores assigned by the evaluation committee to the technical features of the proposal in accordance with the criteria below:

(a) DELIVERY PLAN/SCHEDULE–Maximum Weight–15 Points

Details of the delivery plan, the shortest offered delivery time will obtain maximum points.

(b) QUALITY–Maximum Weight–25 Points

The technical evaluation demonstrates understanding of the context in which these organizations are operating and ability to think strategically about options for these organizations now and in the future given different scenarios. The proposal clearly demonstrates the approach to understanding the needs and designing an effective and engaging workshop that meets those needs.

(c) PAST PERFORMANCE–Maximum Weight–15 Points

Successfully completed at least 3 contracts with similar scope (i.e., supporting NGO startup and strategic planning) of this project . Please provide documentary evidence of these contracts and the full address, telephone number and email addresses of one contact person for each of these contracts/clients indicated for reference check. Details of each company carries 5 points.

(d) PAYMENT TERMS: -10 Points:

RTI's payment terms are to pay suppliers within 30 days after service/product delivery. Supplier who meets this criterion will score points in full, supplier requiring advance will score 0 Points.

Only vendor with a score of 45 Points and above on technical evaluation will be considered for (Stage- 3) financial evaluation.

Stage 3: Financial Evaluation--Price (35 points)

The lowest priced bid that meets the minimum technical specifications on the RFQ will score maximum points at this stage.

12. **Award Notice.** A written notice of award or acceptance of an offer, mailed or otherwise furnished to the successful supplier within the time acceptance specified in the offer, shall result in a binding contract without further action by either party.
13. **Validity of Offer.** This RFP in no way obligates RTI to make an award, nor does it commit RTI to pay any costs incurred by the Seller in the preparation and submission of a proposal or amendments to a proposal. Your proposal shall be considered valid for 60 days after submission.
14. **Representations and Certifications.** Winning suppliers under a US Federal Contract are required to complete and sign as part of your offer RTI Representations and Certifications for values over \$10,000.
15. **Certifications.**
Certification and Disclosure Regarding Payments to Influence Certain Federal Transactions - Certification and Disclosure Regarding Payments to Influence Certain Federal Transaction as referenced in FAR 52.203-11 is hereby incorporated into this Request for Proposal as a condition of acceptance.

Limitation on Payments to Influence Certain Federal Transactions- Limitation on Payments to Influence Certain Federal Transactions as referenced in FAR 52.203-12 is hereby incorporated into this Request for Proposal as a condition of acceptance.

16. **Anti- Kick Back Act of 1986.** Anti-Kickback Act of 1986 as referenced in FAR 52.203-7 is hereby incorporated into this Request for Proposal as a condition of acceptance. If you have reasonable grounds to believe that a violation, as described in Paragraph (b) of FAR 52.203-7 may have occurred, you should report this suspected violation to the RTI's Ethics Hotline at 1-877-212-7220 or by sending an e-mail to ethics@rti.org. You may report a suspected violation anonymously.
17. **The John S. McCain National Defense Authorization Act for fiscal year 2019 - section 889.** RTI cannot use any equipment or services from specific companies, or their subsidiaries and affiliates, including Huawei Technologies Company, ZTE Corporation, Hytera Communications Corporation, Hangzhou Hikvision Digital Technology Company, and Dahua Technology Company ("Covered Technology"). In response to this request for proposal, please do not provide a quote which includes any Covered Technology. Any quote which includes Covered Technology will be deemed non-responsive. Additionally, if the United States Government is the source of funds for this RFP, the resulting Supplier shall not provide any equipment, system, or service that uses Covered Technology as a substantial or essential component

Acceptance:

Seller agrees, as evidenced by signature below, that the seller's completed and signed solicitation, seller's proposal including all required submissions and the negotiated terms contained herein,



constitute the entire agreement for the services described herein.

By: *(Seller Company Name)*

Signature: _____

Title:

Date: