Request for Quote/Proposal (RFQ/RFP)

<table>
<thead>
<tr>
<th>Commodity/Service Required:</th>
<th>Technical Assistance to Support two Energy Access Companies with launching or improving Micro-Energy Finance solutions for clients</th>
</tr>
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<tbody>
<tr>
<td>Type of Procurement:</td>
<td>One-time procurement</td>
</tr>
<tr>
<td>Type of Contract:</td>
<td>Fixed-cost contract</td>
</tr>
<tr>
<td>Term of Contract:</td>
<td>7 Months</td>
</tr>
<tr>
<td>Contract Funding:</td>
<td>USAID</td>
</tr>
<tr>
<td>This Procurement supports:</td>
<td>Power Africa Off-grid Project (PAOP)</td>
</tr>
<tr>
<td>Submit Proposal to:</td>
<td><a href="mailto:paopsubcontracts@powerafrica-offgrid.org">paopsubcontracts@powerafrica-offgrid.org</a></td>
</tr>
<tr>
<td>Date of Issue of RFP:</td>
<td>Wednesday December 29, 2021</td>
</tr>
<tr>
<td>Date Questions from Supplier Due:</td>
<td>Monday January 17, 2022</td>
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<td>Date Proposal Due:</td>
<td>Monday January 24, 2022</td>
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<tr>
<td>Approximate Date Purchase Order Issued to Successful Bidder(s):</td>
<td>Monday February 21, 2022</td>
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**Method of Submittal:**

Email Submission to paopsubcontracts@powerafrica-offgrid.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 90 days from the date specified for the receipt of offers, unless another time is specified in the addendum of the RFP/RFQ.

Solicitation Number PAOP-RFQ/P-2021-007

**Attachments to RFP:**

1. Attachment “A” – Statement of Work
2. Attachment “B” – Instructions to Bidders/Sellers
3. Attachment “C”- Budget Template: Please see Attachment C for suggested budget template. Please provide budget in Microsoft Excel format.
5. All PO Terms and Conditions are listed on our website at forth at: [https://www.rti.org/sites/default/files/rti-purchase-order-terms-and-conditions-v1.16.pdf](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.

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

**Attachment A**

**Commodity Specifications or Statement of Work**

**Statement of Work**

Indicate a description of the activity/service that is expected from the supplier. Provide product specifications or service expectations (both if applicable). Include deliverables, timelines, and any special terms and conditions.

Description of Activity/Service:

**About the Power Africa Off-grid Project**

The Power Africa Off-grid Project (PAOP) is a four-year contract between the United States Agency for International Development (USAID) and RTI International. PAOP intends to accelerate off-grid electrification across sub-Saharan Africa (SSA) to support Power Africa’s Beyond the Grid initiative which contributes to the goal of facilitating 60 million new connections by 2030. Power Africa defines access as the direct or actual number of new households and businesses connected to electricity via an on-grid or off-grid solution. PAOP focuses on accelerating off-grid energy access through solar home systems (SHS) and micro-grids, with the goal of facilitating six million new electricity connections by 2022. Please refer to the Project fact sheet available at: www.usaid.gov/sites/default/files/PAOP_Fact_Sheet.pdf:

The Power Africa Off-grid Project provides technical assistance to support the development of sub-Saharan Africa’s off-grid solar home system, and mini-grid sectors. Under its Access to Finance work stream, the project team provides tailored financial advisory to over 200 companies and investors in sub-Saharan Africa’s off-grid energy sector. The PAOP Access to Finance team also works with a range of leading third-party financial advisors, financial consultants, and boutique advisory firms to provide services to companies with the aim to catalyze more capital into the sector.

**Background**

PAOP has a strong focus on catalysing capital to the Sub-Saharan Africa off-grid market by supporting its growth in a responsible and resilient manner. It is expanding its support to companies by providing advisory on launching micro-clean financing and improving associated receivables quality.
Many PAYG companies are facing issues with their collection rates and overall PAYG portfolio quality. Although these issues are partially caused by external factors (pandemic effects, challenging logistics etc.), several could be addressed with a proper diagnosis and operational improvements. Achieving better collection ratios is key to improving the risk profile of the business and attracting long-term and affordable financing. The need for portfolio quality support is particularly acute in early-stage companies, companies just starting their leasing/PAYGO operations (after selling on cash only), as well as larger ones considering off-balance sheet structures.

**Objective**

PAOP is seeking to contract a third-party advisor to provide short term targeted support to two companies in the off-grid sector, helping them start and/or improving its client or clean energy financing. The support will help companies become more attractive for investors, showing better portfolio quality and repayment ratios.

**Scope of Work**

The selected advisor will provide the company’s management with the following assistance, to be tailored to the company’s specific credit issues and financing ambitions:

PAOP will provide the company’s management with the following assistance, to be tailored to the specific credit issues:

1) Portfolio data analytics: the advisor will review the portfolio and collection data to identify any patterns, outliers and grouping that could support a more effective client selection and business development.

2) Review of credit processes and procedures of the company: the advisor will work with the relevant credit management team to review and analyse their origination, credit assessment and collection procedures.

3) Recommendations for the improvement of the credit/financing process: the advisor will draw tailored recommendations and "quick wins" across the client financing chain.

4) Development of a scoring solution: when needed, the advisor will help improve or create a credit scoring solution that will guide a better portfolio risk management.

5) The advisor will help build internal capacity to ensure the sustainability of the client financing and prudent credit risk management after the end of the support.

6) The advisor will also produce a learning paper on this process for the energy access sector.

**Expected deliverables:**

I. Copy of the portfolio analysis report
II. Summary of the procedures analysis
III. Summary of the recommended improvement to the micro clean energy financing
IV. Summary updates and 30 minute monthly check-in calls with the PAOP team to discuss progress and key updates.
V. Handover Summary Report including a clear continuity plan & recommendations once the assignment is completed.
VI. Whitepaper/learning paper and briefly describe key areas of focus of the paper and length.

Timeline

It is expected that this work would kick off in February 2022 and be completed in September 2022.

Application Submission: Required Documents

- Short (5-7 pages) background and description of the applicant's ability to provide the support requested.
- Three examples of past performance and the structure of such support (no more than six pages total).
- Short biographies of key staff who will support this subcontract.
- Suggested approach to deliver the support
- Detailed budget including estimated level of effort per staff member (include resource level) for each deliverable described above. Please see budget template in attachment c.
- Any other areas of focus that might bring improve the support of companies and that can be provided within the fixed budget ($100,000) for two companies

Qualifications and Selection Criteria:

- Demonstrated experience in assisting financial intermediaries and/or companies with consumer loan product design, collection and portfolio monitoring procedures.
- Demonstrated experience in providing technical assistance for off-grid energy/energy access companies in emerging markets.
- Familiarity with latest trends in portfolio data analytics and receivable financing solutions.
- Familiarity with investors and due diligence requirements in the sector.
- Speaking French is a strong plus.

Selection of consulting companies will be based on (1) 50% technical experience in (description of company's ability to provide support, examples of past performance, and experience of staff proposed), 2) 30% relevant experience in the off-grid sector, 3) 20% price. Note that the $100,000 is a cap for the two off-grid companies to be supported, and that bids who are able to come under that will be awarded points accordingly.
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

   3040 East Cornwallis Road, Research Triangle Park, NC 27709-2194

   *(insert full address of the office)*

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

   *(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 date and time submitted:

   (b) The name, address, and telephone number of the seller (bidder) and authorized signature of same:

   (c) Validity period of Quote:
(d) 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.

(e) 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.

(f) Lead Time Availability of the Commodity/Service.

(g) Terms of warranty describing what and how the warranties will be serviced.

(h) 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).

(i) Payment address or instructions (if different from mailing address)

(j) Acknowledgment of solicitation amendments (if any)

(k) 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).

(l) **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. **Questions Concerning the Procurement.** All questions in regards to this RFQ/RFP to be directed to

   **Joseph Eni and Sara Scholl**

   at this email address:

   **paopscontracts@powerafrica-offgrid.org**

   The cut-off date for questions is:

   **January 10, 2022**

5. **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.
6. **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
   [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. The quality of the technical proposal in terms of methodology statement, key personnel, quality assurance, mobilization schedule, implementation schedule, proposed project execution organogram and any other activities such as the bidding team’s experience and qualifications as specified in the SOW above
    (d) **PAST PERFORMANCE** – Potential vendor 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**.
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 90 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. **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.

16. **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.
## Attachment D: Insurance Policies

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<tr>
<th>Insurance Coverage Requirements</th>
<th>RTI maintains insurance requirements for subcontractors. The attached “Supplier Insurance Requirements” document provides related guidance on the requirements, as well as the required levels of insurance for organizations depending on their geographic location.</th>
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<tr>
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<td>Please review the guidance and related requirements and confirm whether or not your organization meets or can meet the required levels by completing and returning the “Confirmation of Insurance” document. Should your organization not maintain the required insurance, it is recommended that you obtain a quote for coverage and budget accordingly with your offer.</td>
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<td>Please note that the insurance coverage is only required at the time of a subcontract award (for the life of the subcontract) and is not necessary at the Proposal stage.</td>
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### 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: