

## Request for Quote/Proposal (RFQ/RFP)

Commodity/Service Required:	<b>TECHNICAL ASSISTANCE TO SUPPORT CROWDFUNDING PLATFORMS THAT ARE PROVIDING FUNDING TO ENERGY ACCESS COMPANIES</b>
Type of Procurement:	One-time procurement
Type of Contract:	Fixed-cost contract
Term of Contract:	7 Months
Contract Funding:	USAID
This Procurement supports:	Power Africa Off-grid Project (PAOP)
Submit Proposal to:	paopsubcontracts@powerafrica-offgrid.org
Date of Issue of RFP:	Wednesday April 6 <sup>th</sup> , 2022
Date Questions from Supplier Due:	Wednesday May 4 <sup>th</sup> , 2022
Date Proposal Due:	Wednesday May 11 <sup>th</sup> , 2022
Approximate Date Purchase Order Issued to Successful Bidder(s):	Wednesday June 8 <sup>th</sup> , 2022

<b>Method of Submittal:</b>	
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-2022-001

**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. Alternate budget templates may be used. Please provide budget in Microsoft Excel format.
4. Attachment "D" - Insurance Policies
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>,  
[http://www.rti.org/files/PO\\_FAR\\_Clauses.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](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](http://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**

Crowdfunding platforms have played an important role in providing flexible and rapid debt funding to off-grid solar enterprises, and to a lesser degree, have also served as a channel for new types of equity investment. Crowdfunding for energy access has grown rapidly, with 100% year-on-year growth from 2015 to 2019, before a COVID-19 induced contraction of 25% in 2020. The overall volume remains relatively small at a total of \$48 million channeled via crowdfunding platforms in 2020. However, crowdfunding platforms serve a diverse range of off-grid energy

companies, from early-stage companies accessing their first debt funding to industry leaders complementing their other sources of debt on a flexible basis. In the area of climate finance, where public sources of funding are typically dominant, crowdfunding provides a rapid way to access new, private investment capital.

Crowdfunding platforms typically rely on a mix of small-ticket crowd lenders and larger-ticket HNWIs or family offices. While there continues to be high demand from the crowd for transactions on crowdfunding platforms, the platforms still have to invest heavily on investor outreach to keep the crowd engaged and to incentivize their continued investment. Some crowdfunding markets were also more severely hit by dampened retail investor during the COVID-19 pandemic.

### **Objective**

This support by Power Africa Off-grid Project aims to work with up to 4 European crowdfunding platforms specializing in energy access in sub-Saharan Africa to optimize their investor outreach and communication strategies, making them more cost-effective and improving the platforms' capacity to attract and retain the crowd. This support will help mobilize new private investment capital to support enterprises providing access to electricity to households and businesses in sub-Saharan Africa.

### **Scope of Work**

The selected advisor will work with the crowdfunding platform's management team and provide the following assistance:

- Assess the current outreach approach and strategies of each platform
- Following the assessment, advise on improvements and additions to current outreach approaches, including using different behavioral incentives for retail investors/lenders.
- Develop appropriate measurement frameworks to assess the different strategies, building on the platforms' existing KPIs and measurement frameworks, where applicable
- Support the crowdfunding platforms in executing marketing strategies during the support period for campaigns related to clean energy access for households and businesses (each platform is expected to run 3-6 campaigns during the support period, though this will vary per platform)
- Provide final recommendations for each platform based on the outcomes recorded in the measurement frameworks
- Produce a synthesis report with general recommendations on investor outreach strategies for energy access crowdfunding platforms

**Expected deliverables:**

Deliverables to include:

1. Analysis / diagnostic report on current investor outreach practices for each platform
2. Marketing plan for each platform, including performance measurement framework and content creation within budget limits
3. Monthly progress report and update call with PAOP outlining key developments and challenges
4. Final recommendation reports for each platform
5. Synthesis report with findings and recommendations for other platforms in the sector, and companies seeking to raise funds via crowdfunding platforms

**Timeline**

It is expected that this work would kick off in June 2022 and be completed by December 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 within the allotted time.
- Detailed budget including estimated level of effort per staff member (include resource level) for each deliverable described above.
  - The budget shall specify amount allotted for media spending vs. for strategy development
- Any other areas of focus that might support the platforms and that can be provided within the fixed budget (\$130,000)

**Qualifications and Selection Criteria:**

- Expertise in developing and implementing marketing and communications strategies for crowdfunding platforms in multiple European markets, including through content creation, social media marketing, SEO and use of analytics
- Experience working with crowdfunding campaigns related to social impact enterprises
- Solid understanding of European crowdfunding regulations as they pertain to marketing and communications
- Experience working with climate-related, Africa-focused crowdfunding platforms preferred but not required

**Selection of consulting companies will be based on (1) 50% technical experience in developing marketing and outreach strategies** (description of company's ability to provide support, examples of past performance, and experience of staff proposed), **2) 30% relevant experience working with crowdfunding platforms**, **3) 20% price**. Note that the \$130,000 is a cap for the four crowdfunding platforms 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

Power Africa Off-grid Project

*(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:
- paopsubcontracts@powerafrica-offgrid.org
- The cut-off date for questions is:
- May 4<sup>th</sup>, 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 <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. 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.**

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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](mailto: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**

<b>Insurance Coverage Requirements</b>	<p>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.</p> <p>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.</p> <p>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.</p>
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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: