REQUEST FOR PROPOSAL

RFP No: LAC-2024 – 001

USAID Research Linkages Subcontractor under the Education Technical Support Services Contract (ETSS)

CONTRACT:	Latin America and the Caribbean (LAC) Education Technical Support Services Contract (ETSS), 47QRAA23D003U
TYPE OF SUBCONTRACT	Firm-Fixed-Price (FFP) Subcontract
PROJECT/Task Order:	Research Linkages
ESTIMATED BUDGET CEILING:	125,000.00 USD
SUPERVISOR(s)	Jose Pineda
PLACE OF PERFORMANCE:	TBD in LAC Region
QUESTION AND ANSWER PERIOD:	Feb 26th – 29th, 2024
FINAL SUBMISSION OF PROPOSAL DUE BY:	March 8, 2024, 5:00 p.m. EST
TENTATIVE START DATE:	April 1, 2024
COMPLETION DATE:	September 30, 2025

1. BACKGROUND

DevTech Systems, Inc. (DevTech) is an international consulting firm dedicated to development, with 40 years of experience providing advisory services and technical assistance to government, private sector, and civil society stakeholders in more than 100 countries. We are a data driven organization that specializes in informing policy making by delivering focused data-driven evidence-based analysis products and services. DevTech core practice areas include Economic and Data analysis, Monitoring and Evaluation, Education and Youth Development, Gender and Inclusive Development, and Public Financial Management.

DevTech has been implementing the USAID funded Education Technical Support Services Contract (ETSS) since September 2023, which is the continuation of a USAID LAC education program that DevTech has supported since 2018. ETSS aims to provide on-demand support services to the Education Team in the USAID Bureau for Latin America and the Caribbean, Office of Regional Sustainable Development (LAC/RSD/EDU).

2. SOLICITATION

ETSS is soliciting proposals from qualified academic research centers in Latin America and the Caribbean to serve as a subcontractor under the ETSS/USAID Research Linkages activity. This activity aims to increase USAID's collaboration with regional, university-based academic experts on topics of relevance to USAID's policies and activities in LAC, particularly in the areas mentioned in Section 4 of this RFP: Eligibility. The selected academic partner will play a crucial role in bridging the gap between academic research/expertise and development programming/policymaking. Specifically, the selected partner will work with DevTech and USAID to develop products and services to inform USAID interventions and policies under the following framework:

- **Co-design four to six short research/knowledge products:** The selected institution will work closely with DevTech and USAID experts to jointly define research questions, methodologies and policy relevant for specific research papers, briefs, policy notes, analysis etc.
- **Facilitate four to six virtual knowledge exchange workshops and policy dialogues**: Connect researchers with policymakers, private sector actors, and civil society across the Region to bridge the gap between research and practice and present analysis, existing research, and perspectives on regional challenges.
- Create a network of research experts that collaborate and share perspectives on regional priorities.
- As appropriate, establish a joint steering committee (or less formal structure) between the selected research institution, DevTech, and USAID to ensure clear communication and responsiveness to USAID priorities.
- Invest in enhancing research skills, data analysis methods, and policy application capacity of young researchers and faculty.
- Support participation in international roundtables and networks: Expand the exposure of LAC researchers to collaboration opportunities.

3. DELIVERABLES AND PAYMENT SCHEDULE

To meet the requirements of the subcontract, the selected organization or vendor will develop and submit the following deliverables:

#	Deliverable	Payment	Due Date
1	Work Plan after kick-off meeting. Document (10-15 pages) including the approach, list of activities, existing data sets and data collection opportunities, organization structure and oversight, proposed experts as part of the network and all other required tasks under this contract. At a minimum, the work plan must include: ● Proposed activities for the entire period of performance, including a timeline of activities.	30%	2 weeks after signing the contract

	• Proposed quality assurance process and timeliness of requested analysis/research outputs as outlined in this Section. • Proposed resources and personnel to carry out all of the activities under the subcontract. • Concept note for the first virtual meeting with members of the research network to share expertise and USAID introduction. • A detailed activity budget that includes all labor costs, and travel costs.		
2	Research briefs #1, 2 & 3 with corresponding research design and preparation and participation in a knowledge sharing workshop. Study Design includes: • Methodology and policy question. • Dataset used or data collection methodology will include document review (examination of project documents, statistics databases, and other secondary source materials), key informant interviews, survey instruments (if used). • Engagement with USAID on preliminary findings. Research briefs could range from 5-10 pages in length, and may include sharable graphs and analysis, historical analysis, political and economic assessments, about selected topics as agreed upon with the study design. (Briefs may be required in English and Spanish) • Engagement in meetings and workshops to discuss the findings from the research products and engage thinkers, policy makers and interested stakeholders from the region.	20%	September 30, 2024
3	Research briefs #4, 5 & 6 with corresponding study design and participation in a knowledge sharing virtual meeting.	20%	June 30, 2025
4	Final Expert virtual and in-person roundtable to discuss research briefs and policy priorities in the LAC region.	30%	September 15, 2025

Total	**100%**	

All deliverables must be approved by DevTech's Supervisor prior to payment. Deliverables 2 and 3, are part of a package of three briefs each. Thus, payment will take place after approval of the third brief in the package. There will be two review rounds before final brief approval with respective response times. DevTech will work with the subcontractors to establish this timeline aligned with the final deliverables.

4. ELIGIBILITY

This RFP is open to universities and research institutions located in LAC countries with extensive experience in conducting research in a variety of topics. Experience in any of the following priority disciplines relevant to the LAC Bureau Tactical Plan is a plus:

1. Trade and Investment
2. Migration
3. Energy
4. Citizen Security
5. Economics/Finance
6. Youth and Workforce Development
7. Democracy and Governance
8. Environment/Climate Resilience
9. Labor (including the informal sector)
10. Social Protection/Welfare

The ideal institution will also demonstrate:

- Proven expertise in conducting and producing rigorous, peer-reviewed research.

- Direct oversight of/or connections to faculties, research centers or institutes focused on the relevant research disciplines across the region, including access to student populations that can become involved both as research assistants and as an active, participating audience for the socialization of activities and knowledge products.

- Principal investigators (PIs) with proven experience in conducting high quality international development research, policy analysis and knowledge of USAID programming or other international development agencies.

- A core team / personnel with excellent organizational skills to manage a multi-faceted project, including the administrative and budget aspects of a sub-contract.

- Established relationships and networks with policymakers and private sector actors in the LAC region.

5. ORGANIZATIONAL MINIMUM REQUIREMENTS

The organization should possess the following experience and qualifications:

A. Have the institutional and financial capacity to perform all duties outlined in this scope of work.
B. Be a certified, legally registered entity that by law can sign a contract.
C. Not be under court supervision due to bankruptcy or business activities being discontinued.
D. Not be affiliated with any criminal associations or activity.
E. Have and be able to present verified references that document work performed on at least three similar jobs.
F. Have a Unique Entity ID (UEI) generated in SAM.gov

6. PERSONNEL

The Offeror should provide at minimum the following personnel who must be approved by DevTech and cannot be replaced without DevTech permission, and resides where the academic center is located with the following qualifications.

A. **One Team Lead (TL)/Project Manager**. Main point of contact between DevTech and the research institute. Responsible for ensuring all deliverables are completed on time with the highest quality. The TL will identify the principal investigators for each of the agreed upon research papers. The TL could be one of the principal investigators if it has the expertise and time to manage the project and conduct the research.
B. **Up to four Principal Investigators (PIs).** The PI is responsible for providing technical inputs to the study design of the agreed upon research paper between DevTech and the selected institution. The PI will have in-depth expertise to answer the research questions of the assigned study. The PI will lead the development of data collection tools ensuring quality of datasets used, provide active quality control for all outputs and conclusions, and any other technical requirements. The PI has excellent writing skills in English and Spanish. Up to four PIs will be hired under this subcontract recognizing that the research topics in each study may vary and that a diverse set of skills and expertise may be required to develop each study.
C. **Up to four Co-Principal Investigators (Co-PI).** Will support the development of the research design and conclusions. Responsible for supporting data analysis and writing, cleaning data bases, and analyzing the results. Up to four Co-PIs may be hired under this subcontract, this will also depend on the range of the topics agreed for the research papers. Co-PI will have the technical knowledge and expertise to support the PI in addressing the research questions and develop insights regarding the research findings.
D. **Researcher/s.** Responsible for data collection and analysis (excellent Stata/R and policy research capabilities), ideally research fellows, undergraduate, graduate or PhD university students. Number of researchers required to complete the research papers is at the discretion of the selected institution and changes of research assistants does not require DevTech's approval.

7. PROPOSAL REQUIREMENTS

The offeror's proposal must be accompanied by a cover letter typed on official organizational letterhead and signed by an individual who has signatory authority for the offeror. The offeror must submit a complete proposal package on or before the due date and time indicated on page 1 of the RFP. Submission Instructions. Proposals must be submitted by email only and with the subject line "RFP No: LAC-2024 – 001".

The proposals must be prepared in two separate volumes: i) Technical Proposal; and ii) Cost Proposal. The technical and cost proposal must be kept separate. Technical proposals must not refer to or include any pricing data so that DevTech can evaluate the technical proposal strictly based on technical merit.

The proposal must contain the following information and documentation:

Technical Proposal

The Technical proposal shall describe how the offeror intends to accomplish all the requirements stated in the Scope of Work. It should be concise, specific, complete, and demonstrate a clear understanding of the work to be undertaken and the responsibilities of all parties involved. It must demonstrate the offeror's eligibility, as well as their capabilities and expertise in conducting each step of the activity.

Offerors shall include only information necessary to provide a clear understanding of the proposed action and the justification for it. Greater detail than necessary, as well as insufficient detail may detract from a proposal's clarity. Assume that the reader is not familiar with the context in which the project will be implemented. Minimize or avoid the use of jargon and acronyms as much as possible. If acronyms or abbreviations are used, include a separate page explaining the terms.

The Technical Proposal must adhere to the 10-page limit and should include the following sections:

A. **Organization Overview** - Legal name; year of incorporation; number of employees; description of the services and products supplied.
B. 5 Pages- **Narrative** outlining:
   ▪ How will the organization engage students?
   ▪ What are the top three topics from the LAC Bureau Tactical Plan that the organization is best placed to speak on?
   ▪ How would this partnership/subcontract with USAID/DevTech advance the organization's goals?
   ▪ If the organization were going to create a network, who would it suggest and how would it identify members?
   ▪ In what ways would the organization want to influence USAID policy?
C. 2 Pages- **Capabilities and Past Performance** - Description of applicable organizational capabilities/experience and major accomplishments in conducting jobs similar in size and complexity to that outlined in this scope of work in the last 5 years. Information should demonstrate capability of the institution to produce high quality, policy relevant outputs, and access to quality data/analysis and

engagement across the region. Similar jobs (if relevant) should include funding agency and cost.
   D. 2 Pages- **Staffing Plan** - Provide a proposed staffing plan to develop policy briefs, policy papers, data analysis/webpages/presentations and manage the workshops outlined in this SOW. This will include who is the Principal Investigator, the Co-Principal, details on their reputation and publishing record in the sector, and details on their research interests (up to two pages).
   E. **Curriculum Vitae** of proposed key personnel (up to two pages each) along with two references each.CV will not count towards page limit.
   F. **Contact information** of three recent clients or policy makers that can attest to relevance of similar activities. Please provide their name, email, and phone contact information. Contact information will not count towards page limit.

The proposal should **not exceed 10 pages,** excluding CVs and contact information.

Cost Proposal

The offeror should submit their most competitive and complete cost proposal. The cost proposal shall be submitted in a separate volume from the technical proposal. The cost proposal shall be submitted as a firm-fixed price proposal in United States currency. The cost proposal shall include the following:

   A. Cover sheet with organization information, including name, address, email, phone, Unique Entity Identifier (UEI) number, and contact person. If your organization does not have a UEI (generated in sam.gov), you will need to request one. You can request this for FREE at www.sam.gov. For more information, please visit, https://sam.gov/content/entity-registration
   B. Audited Financial Statements for the past three years.
   C. Evidence of Responsibility (see Annex A)
   D. DevTech Supplier Form (see Annex B)
   E. Representations, Certifications, and Other Statements of Bidders (see Annex C) or a statement to confirm that the bidder is duly registered on SAM.gov, and the Representations & Certifications statements have been reviewed and are current in SAM.gov.
   F. A budget in Excel with the Offeror's fixed price for each deliverable, each of which will be considered a fixed price budget for that specific segment of work. The price to be awarded will be an all-inclusive fixed price. No profit, fee or additional costs can be included after the award. All items/services must be clearly labeled and included in the total offered price. The budget must be completed in the attached budget template (see Annex D). It should include three tabs 1) Fixed price 2) Summary 3) Detailed budget. Any assumptions can be included in tab 4. Detailed budget shall include, at minimum: wages, travel and transportation, and other direct costs. The proposed budget will be structured in accordance with the payment schedule in Section 4 above. Applicants are to include all costs deemed necessary to execute this SOW in the application budget.
   G. A detailed budget narrative in word or portable document format (PDF) that justifies the cost as appropriate and necessary for the successful completion of

proposed activities and deliverables. The budget narrative should clearly describe the project and cost assumptions. All proposed costs must be directly applicable to performing the work under the award and budgeted amounts should not exceed the market cost/value of an item or service. The budget narrative should be of sufficient detail so that someone unfamiliar with your organization or the activity could review and adequately understand and grasp the assumptions, reasonableness and calculation method used.

8. LANGUAGE

The proposal, as well as correspondence and related documents, should be in English.

9. EVALUATION CRITERIA

Proposals shall be submitted according to the Proposal Submission instructions above. The Technical Proposal will be evaluated separately from the Cost Proposal. An award will be made to Offeror that submits the best value for money which is demonstrated by offeror's proposal in showing the most advantageous combination of cost, quality, and effort to meet SOW requirements.

Proposals will be evaluated first to ensure that they meet all mandatory requirements and are responsive. To be determined responsive, a proposal must include all documentation as listed in the Proposal Submission Requirements section. Proposals that fail to meet these requirements will receive no further consideration. A non-responsive proposal to any element may be eliminated from consideration.

Responsive proposals will be evaluated and ranked by a committee on a technical basis according to the criteria below. Proposals that are technically acceptable shall then be evaluated in terms of cost.

Evaluation factors are as follows:

No.	Criteria	Points
1	Demonstrated understanding of the Scope of Work	30
2	Capabilities and Past Performance: Previous experience and demonstrated capabilities coordinating and managing research and events in comparable size and complexity	15
3	Relevant experience of proposed personnel to deliver SOW tasks	30
4	Feasibility and cost-effectiveness of the budget proposal	25
	Total	100

10. SUBMISSION INSTRUCTIONS

Please submit your complete proposal electronically to nbrodkey@devtchsys.com by March 8, 2024. Proposals must be in English and clearly marked "RFP No: LAC-2024 – 001".

All questions and final proposal should be submitted by the dates established on page 1 to nbrodkey@devtechsys.com. No late submissions will be accepted.

Additional Information:

For further information about the USAID/ETSS Research Linkages activity or this RFP, please contact nbrodkey@devtchsys.com.

Disclaimer: This RFP does not constitute a commitment by DevTech or USAID to award any contract or subcontract. DevTech does not commit to pay for costs incurred in the preparation and submission of a proposal. Furthermore, DevTech reserves the right to reject any or all proposals at its sole discretion, if such action is considered to be in the best interest of DevTech and/or USAID.

TERMS OF AWARD

This document is a request for proposals only, and in no way obligates DevTech Systems or its donor to make any award. Please be advised that under a fixed price contract the work must be completed within the specified total price. Any expenses incurred in excess of the agreed upon amount in the sub-contract will be the responsibility of the sub-contractor and not that of DevTech or its donor. Therefore, the offeror is duly advised to provide its most competitive and realistic proposal to cover all foreseeable expenses related to providing requested goods/services.

All deliverables produced under the future award/sub-contract shall be considered the property of DevTech. DevTech may choose to award a sub-contract for part of the activities in the RFP.

PROPOSAL VALIDITY

The Offeror's technical and cost proposals must remain valid for not less than 120 calendar days after the deadline specified above. Proposals must be signed by an official authorized to bind the offeror to its provisions.

PAYMENT TERMS

DevTech payment cycle is net 30 days upon receipt of deliverables, goods/services, inspection and acceptance of goods/services as in compliance with the terms of the award and receipt of vendor invoice. Full cooperation with DevTech in meeting the terms and conditions of payment will be given the highest consideration.

FINANCIAL RESPONSIBILITY

Offerors which are firms and not individuals must include in the capabilities statement that they have the financial viability and resources to complete the proposed activities within the period of performance and under the terms of payment outlined below. DevTech reserves the right to

request and review the latest financial statements and audit reports of the offeror as part of the basis of the award.

AUTHORIZED GEOGRAPHIC CODE

The authorized geographic code for procurement of goods and services under this award is "937". Local procurements are to be accomplished in accordance with AIDAR 752.225-70 and ADS 311. Geographic Code 937 is defined as the United States, the cooperating country and developing countries other than advanced developing countries and excluding prohibited sources.

NEGOTIATIONS

The offeror's most competitive proposal is requested. It is anticipated that any award issued will be made solely on the basis of an offeror's proposal. However, the Project reserves the right to request responses to additional technical, management, and cost questions which would help in negotiating and awarding a sub-contract. The Project also reserves the right to conduct negotiations on technical, management, or cost issues prior to the award of a sub-contract. In the event that an agreement cannot be reached with an offeror the Project will enter into negotiations with alternate offerors for the purpose of awarding a sub-contract without any obligation to previously considered offerors.

REJECTION OF PROPOSALS

DevTech reserves the right to reject any and all proposals received, or to negotiate separately with any and all competing offerors, without explanation.

INCURRING COSTS

DevTech is not liable for any cost incurred by offerors during preparation, submission, or negotiation of an award for this RFP. The costs are solely the responsibility of the offeror.

MODIFICATIONS

DevTech reserves the right, in its sole discretion, to modify the request, to alter the selection process, to modify or amend the specifications and scope of work specified in this RFP.

CANCELLATION

DevTech may cancel this RFP without any cost or obligation at any time until issuance of the award.

USAID REGULATIONS

The entity will ensure that all work activities conducted under this contract towards the successful completion of this scope of work is completed in accordance with all applicable USAID and USG regulations, including but not limited to 22 CFR, CFR 200, FAR and FAR 31.3 and AIDAR 731.3 for educational institutions, and AIDAR

SPECIAL CONTRACTING REQUIREMENTS and PRIME CONTRACT CLAUSES
(see Annex E)