



REQUEST FOR PROPOSAL

Date Published:	June 3, 2024
Subject:	Request for Applications for Financial Viability Baseline Assessment for Civil Society Organizations (CSO)
For:	Civil Society in Action (CSA) Activity
Funded by:	United States Agency for International Development (USAID)
Implemented by:	Counterpart International Inc.
RFP Number:	RFP-AR-2024-002
Offer Deadline:	<u>June 18, 2024; 5:00 PM (Yerevan)</u>
Submission:	procurement.csa@counterpart.org

Counterpart International (hereinafter Counterpart) is soliciting proposals for CSOs Baseline Assessment as described in this Request for Proposals (RFP). These services are required under the Civil Society in Action (CSA) Activity (hereinafter “the Award”) funded by the United States Agency for International Development (hereinafter USAID).

Firms or individuals invited by Counterpart (hereinafter “Bidders or Offerors”) to submit offers (hereinafter “bids” or “offers”) for the services described in the attached supply schedules are under no obligation to do so. The Bidder shall bear all costs associated with the preparation and submission of the Proposal, Counterpart will in no case be responsible or liable for those costs, regardless of the conduct or outcome of the solicitation.

This Request for Proposal includes the following sections:

- I. Instructions to Bidders
- II. Technical Specifications

All correspondence and/or inquiries regarding this RFP should be requested in accordance with the enclosed Instructions to Bidders (Section I, Clause 10, Clarifications).

The Instructions to Bidders (henceforth ITB) shall not form part of the bid or of the firm fixed price contract/agreement. They are intended to aid bidders in the preparation of bids. For the purposes of interpretation of these ITB, unless otherwise stated, the number of days stated herein shall be consecutive calendar days.

Submission of bids should be completed in accordance with the enclosed instructions to Bidders (Section I, clause 11, Submission of Bids).

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SECTION I: INSTRUCTIONS TO BIDDERS

1. Introduction

- 1.1 **Request for Proposal (RFP) No. RFP-AR-2024-002**, dated June 3, 2024: Counterpart, acting on behalf of the Civil Society in Action (CSA) Activity, is hereby soliciting bids for the supply of comprehensive CSOs Baseline Assessment as described in Section II of the ITB.

2. Eligible Source Countries for Goods and Services

- 2.1 All goods and services to be supplied under the fixed price contract/agreement shall have their origin in the countries listed under USAID Geographic Code 937 and shall include the following:

937 – “Any area or country including the U.S., cooperating country, and developing countries, excluding advanced developing country.” List of Advanced Developing Countries: <https://2012-2017.usaid.gov/sites/default/files/documents/1876/310mab.pdf>

- 2.2 A bidder will be considered ineligible if it has been suspended, debarred, or ineligible, as Indicated on (1) the “List of Parties Excluded from Federal Nonprocurement Programs” and/or (2) the “Consolidated Lists of Designated Nationals”.

3. Preparation of Bids

- 3.1 Bidders are expected to examine the specifications and all instructions contained in this RFP. Failure to do so shall be at the Bidder's risk.
- 3.2 The Bid prepared by the Bidder and all correspondence related to the Bid and exchanged by the Bidder and Counterpart shall be in English.

4. Contents of Bid

- 4.1 Submitted bids are required to consist of the following documents:

Technical Proposal

1. Organizational or personal background showing evidence of prior performance in assessment and research;
2. Proposed methodology and structure of the assessment, which will include:
 - Proposed sampling methodology
 - Proposed assessment design with a description of tools to be used
 - Team composition and structure
 - Quality control method and tools
3. Plan of action and implementation timetable to address the Specific Tasks under Section II;
4. CVs of proposed professional staff;
5. Statement of Qualifications, referenced in Clause 7. It is required to submit up to three references with email and telephone contact information related to past experiences of similar assessment.

Price Quote

6. Price Quote – in Microsoft Excel or other spreadsheet application document, unlocked, and with formulas intact.

5. Format and Signing of Bid

- 5.1 The Bidder shall prepare one bid in two parts (technical and price quote) with all the required sections of the proposal typed or written in legible ink and shall be signed by a person duly authorized to bind the Bidder.

6. Price Quote

- 6.1 Bidders shall prepare a price quote in a workable Microsoft Excel or other spreadsheet application document (unlocked with intact formulas) specifying the detailed cost breakdown and the total price of the services being offered in response to this RFP. The Bid shall clearly indicate that the prices shall be for the services whose technical specifications are described in Section II – Technical Specifications.
- 6.2 The Bidder shall indicate the unit price in AMD for each service, the description, the quantity, and the total cost in AMD of the Bid, which will comprise the total price of the Bid. If there is any discrepancy between the unit price and the total amount, the unit price shall be considered as correct, and the total amount adjusted accordingly. It shall be assumed that the Bidder is not bidding on any item for which a unit price or total amount is not indicated.
- 6.3 The contract will be at a firm fixed price and all costs associated with logistics such as transportation should be included in the budget.
- 6.4 All prices must be presented with applicable taxes, duties and VAT stated separately.

7. Statement of Qualifications

- 7.1 The Bidder shall include in its bid evidence in support of its technical qualifications and ability to perform the assessment if its bid is accepted. This shall consist of: references to successful prior projects of a similar nature are of key importance. These references should include contact names, e-mail addresses, and telephone numbers of persons who can be contacted regarding the Bidder's prior performance.

8. Bid Validity Period

- 8.1 Bids shall remain valid until August 16, 2024, which is **sixty (60)** days after the offer deadline. A bid valid for a shorter period shall be rejected as non-responsive.

9. Deadline and Late Bids

- 9.1 It is the Bidder's sole responsibility to ensure that bids are received by Counterpart on or before the Offer Deadline **June 18, 2024; 5 p.m. (Yerevan time)**.
- 9.2 A Bid received after the deadline for submission of bids shall be rejected. Bidders will be held responsible for ensuring that their bids are received in accordance with the instructions stated herein and a late bid will not be considered even though it became late as a result of

circumstances beyond the Bidder's control. A late bid will be considered only if the sole cause of its becoming a late bid was attributable to Counterpart, its employees or agents.

10. Clarification of Bidding Documents

- 10.1 Clarifications may be requested in writing not later than five (5) business days prior to the Offer Deadline. The contact for requesting clarifications is: procurement.csa@counterpart.org

11. Submission of Bids

- 11.1 Only electronic submissions will be accepted. All bids with technical and price schedule must be received by **June 18, 2024; 5 p.m. (Yerevan time)** by procurement.csa@counterpart.org.
- 11.2 Ensuring successful transmission and receipt of the bids is the responsibility of the Bidder. It is recommended that no e-mail exceeds the size of 10 MB, including attachments.

12. Amendment of Bidding Documents

- 12.1 Counterpart may at its discretion, for any reason, whether at its own initiative or in response to a clarification by a Bidder, modify bidding documents by amendment. All prospective Bidders that have received bidding documents will be notified of the amendment by e-mail and such amendments will be binding on them.

13. Modification of Bids

- 13.1 Any Bidder has the right to withdraw, modify, or correct its bid after it has been delivered to Counterpart, provided the request for such a withdrawal, modification, or correction together with full details of such modification or correction is received by Counterpart at the submission contact point given above before the time set for opening bids. Counterpart may ask any Bidder for a clarification of its bid; nevertheless, no Bidder will be permitted to alter its Bid Price or make any other material modification after the deadline unless the RFP has been amended or the deadline extended. Clarifications which do not change the Bid Price or other material aspects of the bid may be accepted.

14. Criteria for Award and Evaluation

- 14.1 Subject to Clause 15, Counterpart will award the **Firm Fixed Price Contract (Contract)** to that Bidder whose proposal is deemed acceptable, and which offers the best value based upon the evaluation criteria in Section II – Technical Specifications – Evaluation Criteria. In order for a bid to be deemed acceptable, it must comply with all the terms and conditions of the RFP without material modification. A material modification is one which affects the price, quantity, quality, delivery or installation date of the equipment or materials or which limits in any way any responsibilities, duties, or liabilities of the bidders or any rights of Counterpart. In addition, the successful bidder must be determined to be responsible. A responsible bidder is one who has the technical expertise, management capability, workload capacity, and financial resources to perform the work. Counterpart may, at its option, reject all bids.

15. Counterpart's Right to Accept Any Bid and to Reject Any or All Bids

- 15.1 Counterpart will reject any bid that is nonresponsive. Further, Counterpart reserves the right to waive any minor informalities in the bids received if it appears in Counterpart's best interests

to do so, to reject the bid of any bidder if, in Counterpart's judgment, the bidder is not fully qualified to provide the services as specified in the **Contract**, or to reject all bids.

16. Notification of Award

- 16.1 Before the expiration of the period of bid validity, Counterpart will notify the successful Bidder in writing that its bid has been accepted.
- 16.2 Upon the successful Bidder acknowledging receipt of the Notification of Award, Counterpart will promptly notify each unsuccessful Bidder, the name of the successful Bidder and that their bids were rejected. If after notification of award, a Bidder wishes to ascertain the grounds on which its bid was not selected, it should address its request to Counterpart in writing.

17. Acceptance of Privacy Policy and Terms and Conditions

By Submitting quotation/proposal to Counterpart International, the company or the individual consents to Counterpart's privacy policy terms and conditions (<https://www.counterpart.org/terms-and-conditions/>), and provides Counterpart International permission to process the company's or individual's personal data specifically for the performance of, and purposes identified in, this solicitation document and in compliance with Counterpart's legal obligations under applicable United States and European Union laws, data protection and regulations and any other applicable legal requirements. The company/Individual may withdraw their consent at any time by contacting privacy@counterpart.org. If consent is withdrawn, Counterpart reserves the right to accept or reject the offer.

SECTION II – TECHNICAL SPECIFICATIONS

1. General Background

In October 2022, The United States Agency for International Development (USAID) awarded Counterpart International (CI) a Cooperative Agreement (CA) to implement the Civil Society in Action (CSA) Program. The goal of this activity is to enhance civil society sustainability through improved financial viability, organizational capacity, and policy engagement.

The objective of the program is to equip civil society organizations pursuing democratic consolidation with institutionalized mechanisms and strengthened skills to become more sustainable and to engage in a more effective public policy dialogue with the Government of Armenia. The goal of this activity will be achieved through the following four objectives:

- Objective 1: CSO financial viability improved,
- Objective 2: Organizational capacity of CBOs enhanced,
- Objective 3: CSO and government dialogue on public policy enhanced,
- Objective 4: Locally-led development promoted.

These services will be implemented over a period of 60 days, the estimated starting date July 1, 2024.

2. Objective of the Assignment

The objective of this Request for Proposal (RFP) is to conduct a comprehensive Financial Viability Baseline Assessment for CSOs with the aim of understanding the current financial landscape and challenges faced by these organizations. By analyzing the financial health and sustainability of CSOs, this assessment seeks to provide valuable insights into the factors influencing their financial viability, identify gaps in financial management practices, and explore opportunities for enhancing their financial resilience.

The assessment will not only contribute to the enhancement of organizational capacity within CSOs but also facilitate informed decision-making processes for stakeholders involved in supporting these organizations. Through a systematic examination of financial structures, resource mobilization strategies, and institutional capacities, the assessment aims to provide evidence-based recommendations to strengthen CSOs' financial viability. Ultimately, the findings of this Baseline Assessment will inform the development of tailored interventions and capacity-building initiatives to support CSOs in achieving long-term financial viability, thereby fostering a more resilient civil society sector.

3. Scope of Work

The primary objective of this assessment is to measure the baseline score of the Financial Viability Index (FVI) among partner and non-partner CSOs via standardized methodology. Specific objectives include:

- Assessing each of the four sub-indices, which are as follows: funding diversity, financial management capacity, financial viability strategy, and legal and financial regulatory environment of CSOs.
- Calculating the FVI score for each CSO based on predefined components and weights.
- Comparing the FVI scores of partners CSOs (intervention group) with non-partner CSOs (control group).

- Providing evidence-based recommendations to strengthen the financial sustainability of CSOs.

4. Methodology

The assessment will employ a standardized questionnaire to evaluate the presence of components within each sub-index of the FVI. The methodology will include the following steps:

- Obtaining a database of acting CSOs to generate a representative sample.
- Conducting a baseline survey using random sampling to select CSOs for inclusion in the assessment.
- Administering the questionnaire to selected CSOs to collect data on funding diversity, financial management practices, sustainability strategies, and the legal and financial regulatory environment.
- Calculating the FVI score for each CSO using the prescribed formula.
- Comparing FVI scores between partner and non-partner CSOs.

The bidder should propose a methodology for conducting the assessment, including details on the data collection methods, sampling strategy, and analysis approach. The methodology should be designed to ensure the validity and reliability of the data collected.

5. Assignment Duration, Place of Performance, and Other Conditions

The assignment is expected to take 60 days to complete. The place of performance is Armenia, with the option for remote work as necessary. The bidder should provide details on any other conditions or requirements for performing the work.

6. Staff Structure

The bidder should provide a detailed staffing plan, including the roles and responsibilities of each team member, their qualifications, and their level of effort. The bidder should also provide a description of any subcontractors or partners that will be involved in the assignment.

7. Monitoring and Reporting

The bidder should provide details on their monitoring and reporting approach, including how progress will be tracked, how data will be validated, how issues and risks will be identified and addressed, and how reporting will be conducted.

8. Expected Results, Deliverables

The selected firm or individual will be responsible for delivering the following:

- An inception report with detailed methodology outlining the approach to be used for data collection, analysis, and reporting.
- The database of CSOs serves as a foundational resource for conducting the random sampling and sampling approach for the assessment.
- Dataset with inputs of the survey and calculations of indices derived from the collected data in a user-friendly manner, making it easy to navigate, search, and analyze.
- A narrative report in English presenting the findings of the baseline assessment, including FVI scores for partner and non-partner CSOs.

- Evidence-based recommendations for improving the financial viability of CSOs, based on the assessment findings.
- Any additional materials or documentation relevant to the assessment process.

9. Evaluation Criteria

Bidders will be evaluated based on their ability to respond to the methodology, core services, and specific tasks. See Section I, 14.1 for evaluation criteria and priority rank.

Within the technical response (Section I, 14.1), Bidders should include information which will allow Counterpart to adequately assess the following:

Evaluation Criteria	Points
Technical approach Methodology and proposed approach to the assessment. Clarity and feasibility of the approach, the level of detail provided, and the appropriateness of the methodology for the specific assessment. The technical approach demonstrates a deep understanding of the subject matter and incorporates best practices in the field.	40
Financial offer Cost and value of the proposal, including the personnel, operational, and any other expenses.	30
Professional experience Qualifications and experience of the team submitting the proposal. Relevance and quality of previous work in the field, the team members' expertise, and the ability to successfully complete the assessment. The team's collective curriculum vitae (CV) demonstrates prior experience in conducting assessment and research for both local and international organizations operating in Armenia.	30
Total	100

Overall, the bidder should provide a comprehensive proposal that clearly outlines their approach to conducting the assessment and their ability to deliver high-quality results that meet the objectives of the assignment.

10. Method of payment

The selected bidder will be paid in AMD for services rendered as per the terms and conditions of the **Contract**.

11. Terms and Conditions

This is only a request for a proposal. The issuance of this RFP does not in any way obligate Counterpart, the CSA Activity or USAID to award or pay the costs incurred by potential suppliers in preparing and submitting a bid.

This solicitation is subject to Counterpart's standard terms and conditions. Any resulting compensation shall be governed by these terms and conditions. A copy of the full terms and conditions is available upon request. Please note that the following terms and conditions will apply:

- a) Counterpart Armenia's standard payment terms are 30 days after receipt and acceptance of the requested work reports and/or intermediary deliverables. Payment for the provided services issued under the **Contract** resulting from this RFP will only be issued to the entity submitting the offer in response to such RFP and identified in the corresponding purchase agreement price; Payment will not be issued to a third party.
- b) Any price resulting from this solicitation will be in the form of a **Contract**. The **Contract** issued as a result of this solicitation will have a duration of 60 days. The Offeror must provide the services described in the order documents issued by CSA under the **Contract**. The CSA Activity is only required to pay for services to the extent that the order documents are delivered under the **Contract** resulting from this order request.
- c) No product or service may be provided that is manufactured or assembled, shipped, transported or otherwise involving any of the following countries: Burma (Myanmar), Cuba, Iran, North Korea, Sudan, and Syria.
- d) Any international air or ocean transportation or shipping made as part of a reward arising from this order must take place on United States flag carriers/ships.
- e) United States law prohibits transactions and the provision of resources and support to persons and organizations associated with terrorism. Provider, by virtue of any reward arising from this order, must ensure compliance with such laws.
- f) Title to any goods and services supplied as part of a reward arising from this auction shall pass to Counterpart upon delivery and acceptance of the goods by Counterpart. The risk of loss, injury or destruction of the goods shall be borne by the offeror until title passes to Counterpart.