

SECTION II - INSTRUCTIONS

A. GENERAL INSTRUCTIONS

1. Copies

A separate technical proposal and cost proposal must be submitted. All materials submitted must be in English. An electronic version of both proposals must be delivered in all cases as an attachment to electronic mail. The technical proposal must be in Microsoft Word format while the Cost Proposal must have text in Microsoft Word format and with budgets/spreadsheets in either Microsoft Word or Microsoft Excel format. Hard copy submittals shall include an original plus one copy.

2. Separateness

Technical Proposals must not make reference to costs or pricing data. If the delivery of hard copies is used instead of delivery by electronic mail, then the technical proposal and the cost proposal must be physically separate from each other in separate envelopes. All envelopes must clearly identify the contractor, the Request for Task Order Proposals number, and whether technical or cost material is contained therein.

3. Proposal Due Date

Proposals must be received by close of business, 5:00 p.m. in Lima, Peru local time, on Monday July 18, 2005. Since the American Embassy has established a mandatory package and postal parcels pre-screening process, it is required that all packages comply with this requirement. The Pre-Screening Booth working hours is from 9:00 a.m. to 2:00 p.m., Monday through Friday. Contractors must take this process in consideration when sending their proposals.

4. Delivery

Delivery can be made by hand-delivery, mail or by electronic mail.

a. Delivery by Hand or by Mail

Proposals should be submitted with the name and address of the Contractor on the envelope. Proposals are due to Mr. James J. Dunlap or Mrs. Rosario O. de Saldaña at the addresses listed below.

<i>If sent via mail within USA</i>
James J. Dunlap
Regional Contracting Office
USAID
AmEmbassy
Unit 3760
APO AA 34031
Re: RFP No. 527-P-05-007

Request for Task Order Proposal No. 527-P-05-007
Section II, Instructions to RFP

<i>If sent via courier</i>
Rosario O. de Saldaña
Acquisition Specialist
USAID/Peru
c/o Amembassy Lima
Av. La Encalada cdra 1, s/n
Lima 33, Peru
Telephone: (51-1) 618-1435
Re: RFP No. 527-P-05-007

In order to avoid customs clearance process, proposals sent via courier should not weigh more than 5 kg. (10 lbs.). Packages should include printed documents only. CDs, videos, catalogues and magazines should not be included as they will cause the package to be re-routed to customs.

Electronic delivery shall be made to the following e-mail address: rsaldana@usaid.gov.

5. Unnecessarily Elaborate Proposals

Unnecessarily elaborate brochures or other presentations beyond those sufficient to present a complete and effective proposal in response to this request for proposals are not desired and may be construed as an indication of the applicant's lack of cost consciousness. Elaborate art work, expensive paper and bindings, and expensive visual and other presentation aids are neither necessary nor wanted.

6. Authority to Obligate the Government

The Contracting Officer is the only individual who may legally commit the U.S. Government to the expenditure of public funds. No costs chargeable to the proposal may be incurred before receipt of either a task order signed by the Contracting Officer or a specific, written authorization from the Contracting Officer.

B. INSTRUCTIONS FOR THE PREPARATION OF THE TECHNICAL PROPOSAL

1. General Technical Proposal Format

The general format for the technical Proposal is:

a. Cover Page -Title, name of organization(s) submitting Proposal, contact person, telephone and fax numbers, address, and e-mail.

b. Technical Proposal Body (not to exceed 10 pages) – *THE TECHNICAL PROPOSAL BODY SHALL NOT EXCEED TEN (10) 8.5 x 11 INCH SINGLE SPACED PAGES USING NOT LESS THAN 12 POINT SIZE TYPE.* The 12 point size requirement does not apply to footnotes and tables, though both of these should be used appropriately and not in place of basic text. The authorized attachments specified in Subsection 1.c below shall not be counted towards the page limit; however, any attachments other than those specified shall be counted. The Contractor should avoid simply repeating the language of the RFP.

USAID is not requesting a lengthy cover letter. The cover letter should not exceed two pages. The Contractor may provide an Executive Summary, not exceeding two pages, apart from its cover letter. Any additional pages will count towards the 10-page limit.

c. Annex – The Contractors may include resumes/CVs, letters of commitment for key personnel, a chronogram for the workplan, a list of relevant past performance references and letters of commitments from partners in *the Annex*. More information on these authorized attachments is provided below. Once again, any other items included in *the Annex* will count towards the page limit applicable to *the Technical Proposal Body*.

2. General Technical Proposal Contents

In order to fairly evaluate the Contractor's proposal the following information is required. The information identified below should be divided as follows between the a) The Technical Proposal Body and b) the Annex.

a) The Technical Proposal Body: When preparing the Technical Proposal, please follow the Evaluation Criteria stated in Section III of the RFP.

b) The Annex: The following information shall be provided in the Annex. For professional level technical, management, financial and administrative persons identified as part of the Staff (both longterm personnel and a representative number of short-term specialists), the contractor shall provide a copy of that person's resume or CV. For key

Request for Task Order Proposal No. 527-P-05-007
Section II, Instructions to RFP

task order management staff, include at least three work references. USAID may or may not check references, but given the compressed time schedule for evaluation and selection it seems prudent to have this information available. In addition, signed letters of commitment shall be included for the key personnel proposed and from companies or organizations who will perform a role in providing the services required under this task order. If deemed necessary or appropriate, USAID might require interviews for proposed key task order management individuals as part of the evaluation process. Note that we do plan to have others besides the Chief of Party as “Key”, so this RFP modifies what we sent out earlier.

In the Annex, the contractor shall provide two lists of contracts. First, the contractor shall provide a list of its five most recent contracts or task orders with USAID. The second list should include a list, with a maximum of five, of contracts, task orders or agreements where the contractor believes that it provided services similar to those described in this request for proposals. These two lists can overlap, but please make it clear when and if they do. Reference information should include recent email, fax address and phone numbers.

The following information, and only the following information, is authorized to be included in *the Annex*:

- a. Resumes/CVs;
- b. Key Personnel Letters of Commitment;
- c. Timelines/Chronograms of the Workplan;
- d. Past Performance References;
- e. Corporate Letters of Commitment;
- f. Reference Lists.

C. INSTRUCTIONS FOR PREPARATION OF THE COST PROPOSAL

The cost proposal shall consist of four general parts: 1. Detailed Budget; 2. Budget Notes; 3. Attachments; and 4. Certifications. Each is discussed in more detail below.

1. Detailed Budget

The information to be presented under the Cost Proposal must also indicate the amounts to be spent by CLIN. Stated another way, the budget should relate to CLINs while also showing the type of cost for each CLIN. Contractors should include an overall summary budget as well as detailed annual budgets for the full five year period.

2. Budget Notes

Supporting information should be provided in sufficient detail to allow a complete analysis of each line item cost. This is to include a complete breakdown of the cost elements associated with each CLIN and those costs associated with any proposed subcontract. The budgets should be specific for the line item for the entire period per CLIN and on an annual basis for each line item. It is expected that contractors shall provide this information through the use of detailed spreadsheets and budget notes. The following guidance is provided for the use of the contractors in developing these documents; however, contractors should keep in mind that it is their responsibility to ensure that the information provided is sufficient to provide a basis for USAID to determine that the costs proposed are reasonable and realistic:

1. Salary and Wages – Direct salaries and wages should be proposed in accordance with the applicant’s personnel policies. The budget should include a separate section for Local-Hired National Personnel or Other Non-U.S. Expatriate as defined in Section B.9 (a) (2) Contractor’s IQC.

2. Fringe Benefits - If the contractor has a fringe benefit rate that has been approved by an agency of the Government, such rate should be used and evidence of its approval should be provided. If a fringe benefit rate has not been so approved, the contractor should propose a rate and explain how the rate was determined. If the latter is used, the narrative should include a detailed breakdown comprised of all items of fringe benefits (e.g., unemployment insurance, workers compensation, health and life insurance, retirement, FICA, etc.) and the costs of each, expressed in dollars and as a percentage of salaries.

3. Travel and Transportation - Contractor should include the number of trips, domestic and international, and the estimated costs per trip. Specify the origin and destination for each proposed trip, duration of travel and number of individuals traveling. Per diem should be based on the contractor’s normal travel policies (Contractors may choose to refer to the Federal Standardized Travel Regulations for cost estimates).

4. Equipment - If the Contractor estimates that apart from the equipment listed in the attached Inventory List (Attachment VIII) will be required, please specify the equipment to be purchased, including the type of equipment, the manufacturer, the unit cost, the number of units to be purchased and the expected geographic source.

5. Materials and Supplies - Specify all materials and supplies expected to be purchased, including type, unit cost and units.

6. Communications - Specific information regarding the type of communication cost at issue (i.e. mail, telephone, cellular phones, internet, etc.) must be included in order to allow an assessment of the realism and reasonableness of these types of costs.

7. Subcontracts/Consultants – Information sufficient to determine the reasonableness of the cost of each specific subcontract and consultant expected to be hired must be included. Similar information should be provided for all consultants as is provided under the category for personnel.

8. Allowances - Allowances should be broken down by specific type and by person. Allowances should be in accordance with the applicant's policies and the applicable regulations and policies.

9. Direct Facilities Costs - Specific information regarding the cost of any facilities needed to perform program activities. The information provided should include the unit cost (rent), the time period the facilities are needed and the number of facilities. Only facilities that directly benefit the program activities should be included in this category; all other facility costs should be included in the indirect cost category.

10. Other Direct Costs – This includes report preparation costs, passports and visas fees, medical exam and inoculations, insurance (other than insurance included in the applicant's fringe benefits, as well as any other miscellaneous costs which directly benefit the program proposed by the applicant. The narrative should provide a breakdown and support for all other direct costs. If seminars and conferences are included, the applicant should indicate the subject, venue and duration of proposed conferences and seminars, and their relationship to the objectives of the program, along with estimates of costs.

11. Indirect Costs – Contractor should support the proposed indirect cost rate with a letter from a cognizant U.S. Government audit agency or with sufficient information for USAID to determine the reasonableness of the rates. If a NICRA is available, please attached a copy to the proposal.

12. Fixed Fee - When calculating the fee for the Task Order, Contractor has to refer to the IQC Section B.8. In FAR terms, the Task Order will be a term form, CPFF Contract.

3. Attachments

a. Biographical Data -_Biographical Data Sheet (AID Form 1420-17). The contractor shall submit a Contractor Employee Biographical Data Sheet (USAID Form 1420-17 http://www.usaid.gov/procurement_bus_opp/procurement/forms/1420-17/) to support salary information included in the budget. Lower level positions can be budgeted by category, without biodata support. The form must be signed by the individual and the contractor (or subcontractor) in the appropriate spaces with all blocks completed, as appropriate;

b. Curriculum Vitae - :A resume or curriculum vitae must be submitted as required by Section 2.B. 1.c above.

4. Certifications

The following certifications must be completed and signed and attached to the offeror's cost proposal.

- a. A certification that the proposed personnel were not suggested or requested by USAID;
- b. Disclosure of Lobbying Activities, if the proposal exceeds \$100,000 in accordance with the contract clause entitled "Limitation in Payments to Influence Certain Federal Transactions" (FAR 52.203-11);
- c. Certification Regarding Debarment, Suspension, Proposed Debarment, and Other Responsibility Matters (FAR 52.209-5), if the proposal exceeds the Simplified Acquisition Threshold (currently \$100,000);
- d. Anti-Kickback Procedures (FAR 52.203-7), if the proposal exceeds the Simplified Acquisition Threshold (currently \$100,000); and
- e. Certification Regarding Terrorist Financing