



## REQUEST FOR QUOTATIONS (RFQ)

RFQ Number: InnFinServ\_2024\_02  
Issuance Date: October 16, 2024  
Deadline for Quotes: 10:00 am local Washington, D.C. time on November 15, 2024  
Description: 2025 Technical Training and Training Facilitation Services  
For: OAA/PDT Innovative Finance Services Project  
Funded By: United States Agency for International Development (USAID),  
Contract No. 7200AA22N00009  
Implemented By: Chemonics International Inc.  
Point of Contact: Millicent Womble, Senior Associate

### \*\*\*\*\* ETHICAL AND BUSINESS CONDUCT REQUIREMENTS \*\*\*\*\*

Chemonics is committed to integrity in procurement, and only selects suppliers based on objective business criteria such as price and technical merit. Chemonics expects suppliers to comply with our Standards of Business Conduct, available at <https://www.chemonics.com/our-approach/standards-business-conduct/>.

Chemonics does not tolerate fraud, collusion among offerors, falsified proposals/bids, bribery, or kickbacks. Any firm or individual violating these standards will be disqualified from this procurement, barred from future procurement opportunities, and may be reported to both USAID and the Office of the Inspector General.

Employees and agents of Chemonics are strictly prohibited from asking for or accepting any money, fee, commission, credit, gift, gratuity, object of value or compensation from current or potential vendors or suppliers in exchange for or as a reward for business. Employees and agents engaging in this conduct are subject to termination and will be reported to USAID and the Office of the Inspector General. In addition, Chemonics will inform USAID and the Office of the Inspector General of any supplier offers of money, fee, commission, credit, gift, gratuity, object of value, or compensation to obtain business.

Offerors responding to this RFQ must include the following as part of the proposal submission:

- Disclose any close, familial, or financial relationships with Chemonics or project staff. For example, if an offeror's cousin is employed by the project, the offeror must state this.
- Disclose any family or financial relationship with other offerors submitting proposals. For example, if the offeror's father owns a company that is submitting another proposal, the offeror must state this.
- Certify that the prices in the offer have been arrived at independently, without any consultation, communication, or agreement with any other offeror or competitor for the purpose of restricting competition.
- Certify that all information in the proposal and all supporting documentation are authentic and accurate.
- Certify understanding and agreement to Chemonics' prohibitions against fraud, bribery and kickbacks.

Please contact Charles Smith, [cjsmith@chemonics.com](mailto:cjsmith@chemonics.com) with any questions or concerns regarding the above information or to report any potential violations. Potential violations may also be reported directly to [BusinessConduct@chemonics.com](mailto:BusinessConduct@chemonics.com) or by phone/Skype at 888.955.6881.

## **Section 1: Instructions to Offerors**

1. **Introduction:** The Innovative Finance Services Project is a USAID program implemented by Chemonics International in the United States of America. The goal of the Innovative Finance Services Project is to create a foundational understanding amongst USAID's Acquisition and Assistance workforce and others involved in the procurement process of pay-for-results approaches to the design, development, and financing of USAID awards. As part of project activities, the Innovative Finance Services Project requires the purchase of expert training services to deliver various in-person and virtual training sessions to USAID staff around the world.

The purpose of this RFQ is to solicit quotations for these services. The purpose of this RFQ is to solicit quotations from eligible Vendors for as-needed, ad hoc purchases of expert training services. As a result of this RFQ, the Innovative Finance Services Project anticipates issuing a blanket purchase agreement (BPA)—or possibly multiple BPAs—to establish specific pricing levels and parameters for ordering these services. This will allow the Innovative Finance Services Project to issue specific purchase orders, on an as-needed basis, for the procurement of these services over the next 12 months. The Vendor shall furnish the services described in any purchase orders issued by Chemonics under this BPA. Chemonics is only obligated to pay for services ordered through purchase orders issued under this BPA and delivered by the vendor in accordance with the terms/conditions of this BPA.

Offerors are responsible for ensuring that their offers are received by Chemonics in accordance with the instructions, terms, and conditions described in this RFQ. Failure to adhere with instructions described in this RFQ may lead to disqualification of an offer from consideration.

2. **Offer Deadline and Protocol:** Offers must be received no later than 10:00 am local Washington, D.C. time on November 15<sup>th</sup>, 2024 by email. Any emailed offers must be emailed to [innovativefinance02@gmail.com](mailto:innovativefinance02@gmail.com).

Please reference the RFQ number in any response to this RFQ. Offers received after this time and date will be considered late and will be considered only at the discretion of Chemonics.

3. **Questions:** Questions regarding the technical or administrative requirements of this RFQ may be submitted no later than 10:00 am local Washington, D.C. time on October 24<sup>th</sup>, 2024 by email to [innovativefinance02@gmail.com](mailto:innovativefinance02@gmail.com). Questions and requests for clarification—and the responses thereto—that Chemonics believes may be of interest to other offerors will be circulated to all RFQ recipients who have indicated an interest in bidding.

Only the written answers issued by Chemonics will be considered official and carry weight in the RFQ process and subsequent evaluation. Any verbal information received from employees of Chemonics or any other entity should not be considered as an official response to any questions regarding this RFQ.

4. **Specifications:** Section 3 contains the technical specifications of the items that may be ordered under the BPA.

At this time, specific quantities to be purchased under any BPA resulting from this RFQ are unknown. Specific quantities will depend on the needs of the Innovative Finance Services Project. Individual purchase orders will be issued under the BPA agreement, as the need arises for additional commodities/services.

5. **Quotations:** The per-unit pricing in quotations in response to this RFQ must be priced on a fixed-price, all-inclusive basis, including delivery and all other costs. Pricing must be presented in US Dollars. Offers must remain valid for not less than sixty (60) calendar days after the offer

deadline. Prices quoted must remain fixed for a minimum of 12 months. Offerors are requested to provide quotations on official letterhead or quotation format; in the event this is not possible, offerors may complete the table in Section 3.

In addition, offerors responding to this RFQ are requested to submit the following:

- Organizations responding to this RFQ are requested to submit a copy of their official registration or business license.
- Individuals responding to this RFQ are requested to submit a copy of their identification card.
- A minimum of three (3) references (with name and contact information) indicating the relevant services carried out in the last three (3) years that best illustrate organization/individual's qualifications and past performance. References from USAID or similar donor-funded projects are preferred. Independent verification of the references may be carried out. Chemonics reserves the right to obtain past performance information from sources other than those identified by the offeror.
- Short narrative description of technical know-how, personnel experience, and past performance for similar services.
- The CV(s) of all personnel with references who may be used for training services. (See scope of work for more details).

6. **Delivery**: As part of its response to this RFQ, each offeror is expected to provide an estimate (in calendar days) of the delivery timeframe (after receipt of order). The delivery estimate presented in an offer in response to this RFQ must be upheld in the performance of any resulting contract.
7. **Source/Nationality/Manufacture**: All goods and services offered in response to this RFQ or supplied under any resulting award must meet **USAID Geographic Code 937** in accordance with the United States Code of Federal Regulations (CFR), [22 CFR §228](#). The cooperating country for this RFQ is United States of America.

Offerors may not offer or supply any commodities or services that are manufactured or assembled in, shipped from, transported through, or otherwise involving any of the following countries: Cuba, Iran, North Korea, Syria.

Any and all items that are made by Huawei Technology Company, ZTE Corporation, Hytera Communications Corporation, Hangzhou Hikivision Digital Technology Company, Dahua Technology Company will not be accepted. If offers include items from these entities please note that they will be deemed not technically responsive and excluded from competition.

8. **Taxes and VAT**: The agreement under which this procurement is financed is not exempt from the payment of taxes, VAT, tariffs, duties, or other levies imposed by any laws in effect in the Cooperating Country. Therefore, offerors must include taxes, VAT, charges, tariffs, duties and levies in accordance with the laws of the Cooperating Country.
9. **UEI Number**: Companies or organizations, whether for-profit or non-profit, shall be requested to provide a Unique Entity Identifier (UEI) number if selected to receive an award in response to this RFQ valued greater than or equal to \$30,000 (or equivalent in other currency). If the Offeror does not have a UEI number and is unable to obtain one before the offer submission deadline, the Offeror shall include a statement noting their intention to register for a UEI number should it be selected as the successful offeror or explaining why registration for a UEI number is not possible. UEI numbers can be obtained online at SAM.gov. Further guidance on obtaining a UEI number is available from Chemonics upon request.
10. **Eligibility**: By submitting an offer in response to this RFQ, the offeror certifies that it and its principal officers are not debarred, suspended, or otherwise considered ineligible for an award by

the U.S. Government. Chemonics will not award a contract to any firm that is debarred, suspended, or considered to be ineligible by the U.S. Government.

11. **Evaluation and Award:** The award will be made to a responsible offeror whose offer follows the RFQ instructions, meets the eligibility requirements, is selected through the trade-off approach outlined below.

This RFQ will use the tradeoff process to determine best value as set forth in FAR 15.101-1. That means that each offer will be evaluated and scored against the evaluation criteria and evaluation sub criteria, which are stated in the table below. Chemonics will award a subcontract to the offeror whose proposal represents the best value to Chemonics and the Innovative Finance Services project. Chemonics may award to a higher priced offeror if a determination is made that the higher technical evaluation of that offeror merits the additional cost/price.

Evaluation points will not be awarded for cost, but for overall evaluation purposes of this RFP, technical evaluation factors other than cost, when combined, are considered significantly more important than cost factors. Cost will primarily be evaluated for realism and reasonableness. If technical scores are determined to be nearly equal, cost will become the determining factor.

In evaluating proposals, Chemonics will use the following evaluation criteria and sub-criteria:

- Technical Know How– 20 points: Chemonics will assess whether the proposal explains, understands and responds to the objectives of the project as stated in the Scope of Work.
- Personnel Qualifications – 40 points: Chemonics will evaluate the curriculum vitae (CV) of the proposed team members and evaluate if the offer has the experience and capabilities to carry out the Scope of Work
- Past Performance – 40 points: Offerors must include three (3) past performance references of similar work (under contracts or subcontracts) previously implemented as well as contact information for the companies for which such work was completed. Contact information must include at a minimum: name of point of contact who can speak to the offeror’s performance name and address of the company for which the work was performed, and email and phone number of the point of contact. Chemonics will assess the past performance of the Offerors by contacting three references who may indicate the Offeror’s past performance for projects of similar size and scope.

Please note that if there are significant deficiencies regarding responsiveness to the requirements of this RFQ, an offer may be deemed “non-responsive” and thereby disqualified from consideration. Chemonics reserves the right to waive immaterial deficiencies at its discretion.

Best-offer quotations are requested. It is anticipated that award will be made solely on the basis of these original quotations. However, Chemonics reserves the right to conduct any of the following:

- Chemonics may conduct negotiations with and/or request clarifications from any offeror prior to award.
- While preference will be given to offerors who can address the full technical requirements of this RFQ, Chemonics may issue a partial award or split the award among various Vendors, if in the best interest of the Innovative Finance Services Project.
- Chemonics may cancel this RFQ at any time.
- Chemonics may reject any and all offers, if such action is considered to be in the best interest of Chemonics.

Please note that in submitting a response to this RFQ, the offeror understands that USAID is not a party to this solicitation and the offeror agrees that any protest hereunder must be presented—in writing with full explanations—to the Innovative Finance Services Project for consideration, as

USAID will not consider protests regarding procurements carried out by implementing partners. Chemonics, at its sole discretion, will make a final decision on the protest for this procurement.

12. **Terms and Conditions:** This is a Request for Quotations only. Issuance of this RFQ does not in any way obligate Chemonics, the Innovative Finance Services Project, or USAID to make an award or pay for costs incurred by potential offerors in the preparation and submission of an offer.

This solicitation is subject to Chemonics' standard terms and conditions. Any resultant award will be governed by these terms and conditions; a copy of the full terms and conditions is available upon request. Please note the following terms and conditions will apply:

- (a) Chemonics' standard payment terms are net 30 days after receipt and acceptance of any commodities or deliverables. Payment for purchase orders issued under any BPA resulting from this RFQ will only be issued to the entity submitting the offer in response to this RFQ and identified in the corresponding BPA award; payment will not be issued to a third party.
- (b) Any award resulting from this RFQ will be in the form of a Blanket Purchase Agreement (BPA). The Innovative Finance Services Project anticipates issuing a BPA (or multiple BPAs) under which specific purchase orders can be issued—on an as-needed basis—at the pricing levels established in the BPA. When the need arises for the commodities/services described in the BPA, the Innovative Finance Services Project will issue a purchase order to the BPA-holder. If there are multiple BPA-holders as a result of this RFQ, the purchase order will be issued to the BPA-holder that presents the best value for that specific order, based on price and delivery time. Any BPA issued as a result of this RFQ will have a minimum duration of at least 12 months. The Vendor shall furnish the supplies/services described in any purchase orders issued by the Innovative Finance Services Project under the BPA. The Innovative Finance Services Project is only obligated to pay for supplies/services to the extent purchase orders are issued under any BPA resulting from this RFQ.
- (c) No commodities or services may be supplied that are manufactured or assembled in, shipped from, transported through, or otherwise involving any of the following countries: Cuba, Iran, North Korea, Syria.
- (d) Any international air or ocean transportation or shipping carried out under any award resulting from this RFQ must take place on U.S.-flag carriers/vessels.
- (e) United States law prohibits transactions with, and the provision of resources and support to, individuals and organizations associated with terrorism. The vendor under any award resulting from this RFQ must ensure compliance with these laws.
- (f) The title to any goods supplied under any award resulting from this RFQ shall pass to Chemonics following delivery and acceptance of the goods by Chemonics. Risk of loss, injury, or destruction of the goods shall be borne by the offeror until title passes to Chemonics.

## **Section 2: Offer Checklist**

To assist offerors in preparation of quotations, the following checklist summarizes the documentation to include in an offer in response to this RFQ:

- Copy of offeror's registration, business license, or identification card if submitting as an individual (see Section 1.5 for more details)
- Three references of relevant services carried out in the last three years (see Section 1.5 for more details)
- Narrative description of technical know-how, personnel experience, including CVs of all personnel who may be put forward, and past performance (see Section 1.5 for more details)
- Cover letter, signed by an authorized representative of the offeror (see Section 4 for template)
- Official quotation, including specifications of offered equipment (see Section 3 for example format)

### **Section 3: Specifications and Technical Requirements**

The purpose of this RFQ is to engage the firm to provide training services to Chemonics and the Innovative Finance Services Task Order. The firm shall, and when requested, provide the following services:

1. **Technical Training Services** – Technical training services are required to provide reliable, experienced, and technical information and know-how of the pay-for-results training topics at hand. Technical trainers must have direct USAID OAA experience designing and implementing pay-for-results programs, with a strong preference for former CO/AO or RLA experience. Technical training services will provide direct knowledge and answer participants questions throughout the program, and will also serve as an active facilitator of the course’s materials and activities.
2. **Facilitation Training Services** – Facilitation training services are required to provide technical know-how and experience in learning and development, adult learning, and activity facilitation across a range of technical topics. Facilitation training services shall have previous experience working with, and delivering training to, USAID employees virtually and in-person.

It is envisioned that multiple awards may be issued under this scope of work based on the organization’s ability to provide both technical and facilitation training services or either technical or facilitation training services. Offerors need not provide quotations for services they cannot, or do not want, to deliver. Successful offerors who are selected for a specific training and training service will be paired into a training team the includes a technical trainer, a facilitation trainer, and a logistics coordinator. Each training team will work with Chemonics’ Innovative Finance Services team to ensure the course is delivered according to the materials and agreed-to timing.

Technical Qualifications that the selected offeror must possess:

1. **Technical training services**
  - a. Proposed personnel should have at least 10 years of experience with USAID rules and regulations related to acquisition, assistance, and pay for results approaches.
  - b. Bachelor’s degree in business, psychology, education, training, linguistics or other relevant field required. Master’s degree preferred.
  - c. USAID CO/AO experience highly preferred.
  - d. Previous experience training USAID employees required and a proven track of record providing the services outlined in Scope of Work.
  - e. Deep understanding of, and experience with, e-learning and virtual training platforms, including Google Meet, Microsoft Teams, and Zoom.
  - f. Proposed personnel’s ability to travel to USAID missions to deliver in-person training highly preferred, and required for in-person training services.
  - g. Certifications in coaching, talent development, learning and performance, performance improvement or other relevant topic preferred.
2. **Facilitation training services**
  - a. Proposed personnel should have at least 10 years of experience designing and delivering training to adults on a broad range of topics.
  - b. Bachelor’s degree in business, psychology, education, training, linguistics or other relevant field required. Master’s degree preferred.
  - c. Deep knowledge of adult learning, active facilitation, and training approaches and styles required.
  - d. Previous experience delivering training to USAID employees, in person or virtually, required with a proven track of record providing the services outlined in Scope of Work
  - e. Deep understanding of, and experience with, e-learning and virtual training platforms, including Google Meet, Microsoft Teams, and Zoom.

- f. Proposed personnel ability to travel to USAID missions to deliver in-person training highly preferred, and required for in-person training services.
- g. Certifications in coaching, talent development, learning and performance, performance improvement or other relevant topic preferred.

The table below contains the list of commodities/services that may be ordered under the BPA mechanism. Offerors are requested to provide per-unit quotations containing the information below on official letterhead or official quotation format. In the event this is not possible, offerors may complete this Section 3 and submit a signed/stamped version to Chemonics.

Description and Specifications of Item	Unit	Items and Specifications Offered	Unit Price USD	Total Price USD
<p><i>Technical Training Services</i> for a 10-hour course run across five consecutive days (two hours a day, for five straight days)</p> <ul style="list-style-type: none"> <li>• Training will be delivered virtually</li> <li>• Course is titled <i>Performance Based Awards Bootcamp</i></li> <li>• Materials are fully developed</li> <li>• Estimated LOE is 24 hours (10 hours of delivery and 10 hours of preparation, and 4-hours of wrap-up)</li> <li>• Summary report of training activities including recommended changes/adjustments, overall description of training delivery, and any specific challenges and/or successes during implementation</li> </ul>	1	One technical training services trainer for the course articulated in the Description and Specifications of Item		
<p><i>Facilitation Training Services</i> for a 10-hour course run across five consecutive days (two hours a day, for five straight days)</p> <ul style="list-style-type: none"> <li>• Training will be delivered virtually</li> <li>• Course is titled <i>Performance Based Awards Bootcamp</i></li> <li>• Materials are fully developed</li> <li>• Estimated LOE is 24 hours (10 hours of delivery and 10 hours of preparation, and 4-hours of wrap-up)</li> <li>• Summary report of training activities including recommended changes/adjustments, overall description of training delivery, and any specific challenges and/or successes during implementation</li> </ul>	1	One facilitation training services trainer for the course articulated in the Description and Specifications of Item		
<p><i>Technical Training Services</i> for a 16-hour course run across four half days (two half days across two consecutive weeks)</p> <ul style="list-style-type: none"> <li>• Training will be delivered virtually</li> <li>• Course is titled <i>Pay for Results 101</i></li> <li>• Materials are fully developed</li> <li>• Estimated LOE is 24 hours (16 hours of delivery and 8 hours of preparation)</li> <li>• Summary report of training activities including recommended changes/adjustments, overall description of training delivery, and any specific challenges and/or successes during implementation</li> </ul>	1	One technical training services trainer for the course articulated in the Description and Specifications of Item		



<p><i>Facilitation Training Services</i> for a 16-hour course run across four half days (two half days across two consecutive weeks)</p> <ul style="list-style-type: none"> <li>• Training will be delivered virtually</li> <li>• Course is titled <i>Pay for Results 101</i></li> <li>• Materials are fully developed</li> <li>• Estimated LOE is 24 hours (16 hours of delivery and 8 hours of preparation)</li> <li>• Summary report of training activities including recommended changes/adjustments, overall description of training delivery, and any specific challenges and/or successes during implementation</li> </ul>	1	One facilitation training services trainer for the course articulated in the Description and Specifications of Item		
<p><i>Technical Training Services</i> for an 8-hour course run across two half days (4 hours a day)</p> <ul style="list-style-type: none"> <li>• Training will be delivered virtually</li> <li>• Course is titled <i>Fostering Localization Through Fixed Amount Awards</i></li> <li>• Materials are fully developed</li> <li>• Estimated LOE is 16 hours (8 hours of delivery and 8 hours of preparation)</li> <li>• Summary report of training activities including recommended changes/adjustments, overall description of training delivery, and any specific challenges and/or successes during implementation</li> </ul>	1	One technical training services trainer for the course articulated in the Description and Specifications of Item		
<p><i>Facilitation Training Services</i> for an 8-hour course run across two half days (4 hours a day)</p> <ul style="list-style-type: none"> <li>• Training will be delivered virtually</li> <li>• Course is titled <i>Fostering Localization Through Fixed Amount Awards</i></li> <li>• Materials are fully developed</li> <li>• Estimated LOE is 16 hours (8 hours of delivery and 8 hours of preparation)</li> <li>• Summary report of training activities including recommended changes/adjustments, overall description of training delivery, and any specific challenges and/or successes during implementation</li> </ul>	1	One facilitation training services trainer for the course articulated in the Description and Specifications of Item		
<p><i>Technical Training Services</i> for a 32-hour course run across four consecutive days for 8 hours per day</p> <ul style="list-style-type: none"> <li>• Training will be delivered in-person at international USAID Missions. The following locations are illustrative: Thailand, Colombia, South Africa, and Jordan</li> <li>• Course is titled <i>Pay-for-Results 201: A practitioner's course from design to implementation</i></li> <li>• Materials are fully developed</li> <li>• Estimated LOE is 80 hours (32 hours of delivery, 16 hours of preparation, 1 day of wrap-up, and 3 days for travel)</li> <li>• Summary report of training activities including recommended changes/adjustments, overall description of training delivery, and any specific challenges and/or successes during implementation</li> </ul>	3	One technical training services trainer for the course articulated in the Description and Specifications of Item		

<p><i>Facilitation Training Services</i> for a 32-hour course run across four consecutive days for 8 hours per day</p> <ul style="list-style-type: none"> <li>• Training will be delivered in-person at international USAID Missions. The following locations are illustrative: Thailand, Colombia, South Africa, and Jordan</li> <li>• Course is titled <i>Pay-for-Results 201: A practitioner's course from design to implementation</i></li> <li>• Materials are fully developed</li> <li>• Estimated LOE is 80 hours (32 hours of delivery, 16 hours of preparation, 1 day of wrap-up, and 3 days for travel)</li> <li>• Summary report of training activities including recommended changes/adjustments, overall description of training delivery, and any specific challenges and/or successes during implementation</li> </ul>	3	One facilitation training services trainer for the course articulated in the Description and Specifications of Item		
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Delivery time (after receipt of order): \_\_\_\_\_ calendar days

The delivery estimate presented in an offer in response to this RFQ must be upheld in the performance of any resulting contract.

The prices quoted above remain fixed for the next 12 months:  
 Yes       No

**Section 4: Offer Cover Letter**

*The following cover letter must be placed on letterhead and completed/signed/stamped by a representative authorized to sign on behalf of the offeror:*

To: Innovative Financial Services Project  
Chemonics International  
1275 New Jersey Avenue SE  
Washington D.C. 20003-5115

Reference: RFQ No. InnFinServ\_2024\_02

To Whom It May Concern:

We, the undersigned, hereby provide the attached offer to perform all work required to complete the activities and requirements as described in the above-referenced RFQ. Please find our offer attached.

We hereby acknowledge and agree to all terms, conditions, special provisions, and instructions included in the above-referenced RFQ. We further certify that the below-named firm—as well as the firm’s principal officers and all commodities and services offered in response to this RFQ—are eligible to participate in this procurement under the terms of this solicitation and under USAID regulations.

Furthermore, we hereby certify that, to the best of our knowledge and belief:

- We have no close, familial, or financial relationships with any Chemonics or Innovative Finance Services project staff members;
- We have no close, familial, or financial relationships with any other offerors submitting offers in response to the above-referenced RFQ; and
- The prices in our offer have been arrived at independently, without any consultation, communication, or agreement with any other offeror or competitor for the purpose of restricting competition.
- All information in our offer and all supporting documentation is authentic and accurate.
- We understand and agree to Chemonics’ prohibitions against fraud, bribery, and kickbacks.

We hereby certify that the enclosed representations, certifications, and other statements are accurate, current, and complete.

Authorized Signature: \_\_\_\_\_

Name and Title of Signatory: \_\_\_\_\_

Date: \_\_\_\_\_

Company Name: \_\_\_\_\_

Company Address: \_\_\_\_\_

Company Telephone and Website: \_\_\_\_\_

Company Registration or Taxpayer ID Number: \_\_\_\_\_

Company UEI Number: \_\_\_\_\_

Does the company have an active bank account (Yes/No)? \_\_\_\_\_

Official name associated with bank account (for payment): \_\_\_\_\_