



USAID Diaspora Invest Project

USAID Diaspora Invest Project

Request for Proposals

No. RFP-2023-04

for Diaspora Engagement Advisory Services under an Indefinite Quantity Subcontract (IQS)

Contracting Entity: USAID Diaspora Invest Project, Marsala Tita 28, 71000 Sarajevo, BiH

Funded by: United States Agency for International Development (USAID) under Contract Number 72016822C00001 with Financial Markets International, Inc.

Issuance Date: 16 August 2023

Closing Date/Time for Submission of Proposals: The deadline for submitting applications under this solicitation is 8 September 2023 at 4:00 PM CET (please include the words “RFP-2023-04 Proposal” in the subject line of the email).

Deadline for Submitting Questions: The deadline for submitting questions is 28 August 2023. All questions should be directed at info@diasporainvest.ba (please include the words “RFP-2023-04 Question” in the subject line of the email).

USAID DIASPORA INVEST PROJECT
Request for Proposals (RFP) No. RFP-2023-04 for Diaspora Engagement Advisory Services Under an Indefinite Quantity Subcontract (IQS)

Title:	Diaspora Engagement Advisory Services Under an Indefinite Quantity Subcontract (IQS) – RFP-2023-04
Objective:	Support capacity development of LGUs and MSMEs to engage with the BiH diaspora
Work Plan Reference:	Activity 1.2, 1.3, 1.4, 1.5, 1.6, 1.7, 1.8, 2.4, 3.1, 3.3, 3.4, 3.6, 4.1 (Local Ecosystem Procurement Facility – LEPM)
RFP Date of Issuance:	16 August 2023
Due Date for Questions:	28 August 2023 <ul style="list-style-type: none"> • Submission of questions or requests for clarification will only be accepted in writing via email to info@diasporainvest.ba by 16:00 Hours local time in BiH. • Please do not contact any USAID Diaspora Invest Project (DI) employees regarding this RFP. Contacting individual employees may be cause for disqualification. • No telephone inquiries will be answered. • Answers to be shared via email to all interested offerors 3 days after questions are due.
Deadline for Proposals:	The deadline for submitting offers under this solicitation is Friday, 8 September 2023 at 4.00PM CET. Proposal submission (including technical proposal and budget, supporting documentation) due by 16:00 Hours (BiH time) via email to info@diasporainvest.ba . Insert the following in the subject line: “RFP-2023-04 – Advisory Services” Proposals received after the deadline may not be considered.
Anticipated Start Date:	1 October 2023 (<i>Start date is subject to change</i>)
Anticipated Period of Performance:	IQSs will be awarded to subcontractors, and performance will commence based on Task Orders. The duration of resulting IQS is effective from the date of subcontract award through October 16, 2027, which is the current expiry date of the USAID Diaspora Invest Project Contract with USAID.
Budget ceiling:	No funding will be obligated upon IQS award. An IQS award shall authorize a ceiling for purchase(s) of services up to a maximum of \$100,000 for the anticipated period of performance where subsequent Task Orders authorize actual funding. Revealing the estimated cost ceiling does not mean Offeror ¹ should strive to meet this maximum amount. Offerors must propose costs they believe are realistic and reasonable for the work.
Award Type:	Indefinite Quantity Subcontracts to one or more subcontractors
Authorized Geographic Code:	The authorized geographic code for procurement of goods and services under this contract is 935 (any area or country including the recipient country but excluding any country that is a prohibited source ²).

¹ Offeror refers to organizations offering to implement the work outlined in this RFP and will be used throughout this document.

² For more information on Source and Nationality Requirements see <https://www.usaid.gov/sites/default/files/2022-12/310.pdf>.

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List of Acronyms

B2B	Business-to-Business
BiH	Bosnia and Herzegovina
BDSP	Business Development Service Provider
CET	Central European Time
DBA	Defense Base Act Insurance
DI	USAID Diaspora Invest Project
IQS	Indefinite Quantity Subcontracts
LEPM	Local Ecosystem Procurement Mechanism
LGU	Local Government Unit
MSME	Micro, Small and Medium Size Enterprise
NGO	Non-Governmental Organization
NICRA	Negotiated Indirect Cost Rate Agreement
OFAC	Office of Foreign Assets Control
PDF	Portable Document Format
RFP	Request for Proposals
SOW	Scope of Work
TEC	Technical Evaluation Committee
UEI	Unique Entity Identifier
USAID	United States Agency for International Development
VAT	Value Added Tax

Section I: Instruction to Offerors

I.1. Introduction

Financial Markets International Inc. (FMI), the Implementing Partner for the USAID Diaspora Invest Project (DI), is soliciting proposals from eligible vendors interested in providing various Advisory Services to Local Government Units (LGUs) and Micro, Small and Medium Sized Enterprises (MSMEs) in BiH, as described in Section II. Scope of Work.

Offeror's responding to this RFP should prepare a proposal demonstrating their qualifications and capacity to provide one or more Advisory Services as detailed in this solicitation. FMI anticipates awarding Indefinite Quantity Subcontracts (IQSs) to a number of successful Offerors, whom upon award, become eligible to carry out work orders in particular service areas over the life of the DI Project.

An Indefinite Quantity Subcontract (IQS) is a mechanism that permits FMI/USAID DI to easily procure services over the life of the Project based on vendors' specializations and DI Project needs. No funding is obligated upon award of an IQS. Rather, successful Offerors are invited to become FMI subcontractors eligible for follow-on task orders. FMI/USAID DI will place orders for specific services (Task Orders) from IQS awardees (Subcontractors). Under this mechanism, the IQS establishes a subcontractor relationship, while issued Task Orders serve as the legally binding agreements that authorize funding for services.

An IQS award does not obligate FMI/USAID DI to actually acquire any services from vendors but does provide a simplified process for future procurements. As such, IQSs do not specify the delivery date(s) or the related quantity of the specific services. IQSs are aligned with service areas and contain the main terms, conditions and the pricing methodology to be used in negotiating Task Orders. Each Task Order will contain specific information regarding the services being requested by USAID DI such as the period of performance, deliverables, and other details about the specific work ordered.

Task Orders issued under an IQS will be on a Fixed Price basis. FMI/USAID DI anticipates issuing Task Orders to select Subcontractors based on need for particular services and the Subcontractor's ability to provide needed services as demonstrated by the proposals submitted in response to this solicitation. When solicited for a Task Order, the selected Subcontractor would be required to develop a budget (i.e., task order cost proposal) for the Task Order using the pricing methodology set forth in the IQS. USAID DI will not reimburse a Subcontractor for any costs associated with managing the IQS.

The award of an IQS does not obligate FMI/USAID DI to execute any Task Orders, nor does it commit FMI/USAID DI to pay any costs incurred in the preparation and submission of proposals. Furthermore, USAID DI reserves the right to reject any and all offers, if such action is considered to be in the best interest of USAID DI.

Offerors are invited to submit proposals in response to this IQS RFP in accordance with Section I: Instruction to Offerors.

Unless otherwise stated, the periods named in the IQS RFP shall be consecutive calendar days.

I.2. Eligibility

USAID DI anticipates issuing IQSs to a number of eligible vendors. To be eligible, a vendor must be a U.S. or international company or organization, legally registered and recognized under the laws of the United States or the country in which the vendor is registered and in compliance with all applicable

civil, fiscal, and other applicable regulations. Private firms, non-profits, civil society organizations, and academic institutions are invited to submit offers in response to this IQS RFP, subject to the following requirements:

- Companies or organizations, whether for-profit or non-profit, must be legally registered under the laws of the United States or the country in which the provider is registered upon award of the IQS.
- Firms operated as commercial companies or other organizations or enterprises (including nonprofit organizations) in which foreign governments or their agents or agencies have a controlling interest are **not** eligible.
- Companies or organizations, whether for-profit or non-profit, shall be requested to provide a UEI number if selected to receive an IQS valued at USD\$30,000 or more, unless exempted.

I.3. Submission of Offers

The Offeror must submit its proposal **through electronic submission, by email**. Hand delivered proposals (including commercial courier) and facsimile transmission will not be accepted. The offer and all correspondence and documents relating to the offer shall be in English.

The offer must be submitted by email no later than Friday, 8 September 2023 at 4.00PM CET to info@diasporainvest.ba with a subject line: “RFP-2023-04 – Advisory Services”.

Offerors are responsible for ensuring that their offers are received in accordance with the instructions stated herein. In accordance to FAR 52.215-1(c)(3)(ii)(A), late offers may be considered at the discretion of USAID DI. USAID DI cannot guarantee that late offers will be considered.

Offers **must consist of two separate parts**: Part 1. Technical Proposal and Part 2. Cost Proposal. While these two parts can be submitted via the same email submission, the Technical Proposal shall not reference the Cost Proposal. All parts must be submitted in either MS Word (or compatible), MS Excel, or Adobe Acrobat portable document format (PDF). Those pages requiring original manual signatures should be scanned and sent in PDF format.

I.4. Presentation of Offers

The Offeror’s proposals should be specific, complete, and concise. The Offeror is urged to examine this solicitation in its entirety and to assure that its offer contains all the necessary information, provides all required documentation and is complete in all respects since the evaluation of proposals will be based on the actual material presented and not on the basis of what is implied.

A. Cover Letter

The Offeror’s cover letter shall include the following information:

- a. Name of the company or organization
- b. Type of company or organization
- c. Address
- d. Telephone
- e. Email
- f. Taxpayer identification number
- g. UEI Number (if the Offeror does not have a UEI number or is unable to obtain one prior to proposal submission deadline, Offeror shall attach a copy of the UEI application or include a statement in

their Evidence of Responsibility Statement noting their intention to register for a UEI number should it be selected as a successful Vendor or explaining why registration for a UEI number is not possible.)

A sample template is included in Attachment 1: Sample Cover Letter.

B. Technical Proposal

The Technical Proposal shall demonstrate the Offeror's understanding of project objectives and the Offeror's qualifications and capacity to supply one or more of the Advisory Services detailed in Section 2.2 Scope of Work, where anticipated tasks under each Advisory Service are further detailed in Section 2.3 Specific Tasks Under the Scope of Work. The Technical proposal should provide sufficient information on staffing, past performance, and the Offeror's proposed methodology to indicate that the Offeror can provide Advisory Services and perform the anticipated tasks thereunder.

An Offeror's Technical Proposal need not address all Advisory Services. An Offeror may choose to focus on one or more Advisory Services. In all cases, the Technical Proposal must clearly indicate which Advisory Services the Offeror intends to supply. The Technical Proposal should be comprised of the following sections (Technical Approach, Capability Statement, Personnel/Staffing, Past Performance, and Administrative Annexes) and will be evaluated based on the criteria described in section 1.6 Evaluation Criteria.

- **Technical Approach (not to exceed 8 pages)**

This section should describe the Offeror's understanding of the assignments for each service the Offeror intends to supply; the requirements for service provision; how the Offeror is well positioned to supply the chosen Advisory Services and perform anticipated tasks; and the Offeror's methodology for implementing, designing, and performing such services and tasks in alignment with DI Project objectives. When discussing methodology, the Offeror may recommend ways to improve assignments in line with Project goals.

This section should also include a management approach and framework to be utilized, as well as a risk mitigation plan addressing potential risk that would disrupt the progress of the service and how these risks will be mitigated.

- **Capability Statement (not to exceed 2 pages)**

The Offeror should explain their capability to perform the scope of work and tasks. Offeror shall demonstrate it has the necessary organizational systems and procedures, e.g. personnel policies, travel policies, project management, equipment, supplies and personnel in place to successfully comply with contract requirements and accomplish expected results.

- **Personnel/Staffing (not to exceed 2 pages)**

The Offeror should identify, in summary format of 2-3 sentences, the names and anticipated positions of the field team leaders and essential personnel proposed to perform the requirements of this scope of work and tasks. The narrative shall include the percentage of staff time of principals and managers on this activity.

The approach should include the organizational structure of the entire project team (including sub-awardees and other local partners) and explain how the staffing plan will result in successful implementation of the proposed technical approach and accomplish the objectives of the activity. If the Offeror anticipates using any sub-contracts, include the roles and responsibilities of each subcontractor, and the lines of authority and communication.

CVs (not to exceed two pages each) that clearly describe education, experience, and professional credentials, shall be completed and attached for the proposed personnel and submitted in the Annex

to Technical Proposal. The pages included in the Annex do not count towards the page limitation for this section.

- **Past Performance (not to exceed 2 pages)**

Offeror shall briefly describe how the past performance of the Offeror and its team (including all partners of a coalition/joint venture) is relevant to performance of the scope of work and tasks. The Offeror shall submit a list of current and past similar work and assignments completed in the past five years that were similar in size, scope and complexity. Include the contact information: company or organization, name, phone number and email.

- **Administrative Annexes**

The following are required in the Administrative Annex:

- Copy of legal registration
- Evidence of Responsibility (Attachment III: Administrative Annexes)
- A Declaration on Financial Stability and Conflict of Interest (Attachment III: Administrative Annexes)
- Offerors' Declaration on Conflict of Interest (Organizational) (Attachment III: Administrative Annexes)
- Certification Regarding Lobbying (Attachment III: Administrative Annexes)
- Certification Regarding Terrorist Financing, Implementing Executive Order 13224 (Attachment III: Administrative Annexes)

C. Cost Proposal

The Cost Proposal submitted in response to this solicitation will require that the Offeror prepare (i) a labor schedule and (ii) an illustrative fixed-price budget in response to a sample task order. The purpose of this Cost Proposal is to assess the Offeror's ability to adhere to cost reasonableness principles when implementing future task orders.

The Offeror must prepare a labor schedule that lists the personnel the Offeror intends to mobilize for its chosen Advisory Service(s). Wherever possible, personnel identified in the labor schedule should match those identified in the Technical Proposal, however, position descriptions with qualification requirements are acceptable for labor categories with unnamed experts. The Offeror is encouraged to review Section 2.5 Personnel Requirements for an explanation of how labor categories should be structured.

In addition, the Offeror must prepare an illustrative budget in response to a sample task order. The sample task order does not reflect an actual task order and it includes only those parameter necessary to prepare an illustrative budget. The parameters of the deliverables Task Order are included in Attachment 4: Deliverables Budget for Cost Proposal enclosed in MS Excel format to this RFP. While quotations for services/deliverables must be provided on a fixed-price all-inclusive basis, cost reasonableness demands that the Offeror show how prices were calculated by listing specifications for services and required inputs. The Offeror is encouraged to reference its labor schedule, identify personnel it would mobilize for the assignment and estimated LOE days, and list all other inputs/costs needed to complete the assignment. The preparation of this budget is an exercise to evaluate the ability of the Offeror to prepare budgets for actual task orders when solicited through the IQS mechanism.

The Cost Proposal submitted in response to this solicitation, as well as all task order cost proposals solicited after an IQS award, must adhere to the following requirements:

- Cost Proposals from BiH Offerors shall be presented in BiH BAM. Cost Proposals from US or other Geo Code 935 qualified Offerors shall be presented in US Dollars.
- Quotations for services/deliverables must be provided on a fixed-price, all-inclusive basis. A quotation is all-inclusive when it covers all associated costs for performance of the service, including material, labor, equipment, subcontractor, and other costs (e.g., travel, allowances, etc.). No additional sums will be payable for any change or escalation in the cost of materials, equipment, or labor.
- The Offeror shall agree that the prices quoted to FMI/USAID DI represent the lowest prices at which Offeror currently sells the goods or services offered under comparable terms and conditions to any United States Government or U.S. Government funded customers. If during the life of the IQS, the Offeror sells the goods or services to any U.S. Government or U.S. Government funded customer for a lower price, it will promptly inform FMI/USAID DI and execute an amendment to the IQS so that such lower price applies to any pending or subsequent goods/services delivered thereunder.

A guide to creating a Cost Proposal is included in Attachment II: Guide to Creating a Cost Proposal for a Fixed Price Contract.

These sections, including the annex where relevant, must include all information required to fairly evaluate the Offeror under the applicable evaluation factors. Specific guidance on the content of each of these sections is set forth below.

I.5. Validity of Offers

Offerors are required to confirm in writing that their offer is valid and will remain open for ninety (90) days from the date the offer is submitted.

I.6. Evaluation Criteria

USAID DI will evaluate proposals based on the Trade-Off Process in accordance with this Section and award IQSs to the responsible Offerors that presents a proposal that offers the best value to USAID DI considering both cost and non-cost factors. “Best value” is defined as the expected outcome that provides the greatest overall benefit in response to the RFP requirements.

Proposals will be evaluated and scored by a technical evaluation committee (TEC) using the evaluation criteria stated herein. When evaluating the competing Offers, USAID DI will consider the written qualifications and capability information provided as well as any other information obtained through its own research.

Technical and Cost will be evaluated relative to each other, as described herein. Technical is significantly more important than cost or price. The Technical Proposal will be scored using the criteria shown in this section. Based on the assessment of the technical qualities of the proposals, a competitive range may be established.

USAID DI will conduct its evaluation of Offerors’ Technical Proposals as prescribed herein. The evaluation factors (including sub-factors) listed below are presented by descending order of importance, so that Offerors will know which areas require emphasis in the preparation of information.

Offerors must note that these criteria serve as the standard against which all technical information will be evaluated and serve to identify the significant matters which Offerors must address.

Evaluation Criteria		Points
I	Technical Approach	30

	<ul style="list-style-type: none"> Extent to which the Offeror demonstrates an understanding of the development context and Statement of Work Comprehensiveness of proposed approach. Clarity and appropriateness of requirements for proposed assignments, and Offeror’s ability to deliver on those requirements. Methodology is realistic and include all proposed elements of an activity. Completeness of management approach, and sufficiency of risk mitigation plan for addressing any potential risks. 	
2	<p>Capability Statement – based on the extent to which the Offeror and its partners or subcontractors (if any) convincingly demonstrate its institutional capability to effectively and successfully achieve the objectives in the statement of work and implement its proposed technical approach.</p> <ul style="list-style-type: none"> Organizational competence relative to the Tasks, including knowledge of and experience working in BiH and the region Capabilities mobilizing short-term technical assistance experts and teams Organizational systems and procedures 	20
3	<p>Personnel</p> <ul style="list-style-type: none"> Quality and appropriateness of the proposed personnel, including the extent to which they meet qualification requirements and convincingly demonstrate the Offeror’s ability to effectively and successfully achieve the contract’s objectives. Reasonableness of the proposed number of person-days needed to accomplish the work. 	30
4	<p>Past Performance/References</p> <p>Overall, previous successful experience implementing similar activities, looking at:</p> <ul style="list-style-type: none"> Quality of product or service, including timeliness of performance; Meeting goals and targets; Customer satisfaction with performance; and Prior experience working in BiH and the Western Balkans. 	20
TOTAL		100

Cost Proposals will be evaluated but will not be scored. The evaluation of the Offeror’s Cost Proposal will deal with cost analysis and cost realism analysis. In accordance with FAR 15.404-1(d), USAID DI will perform a cost realism analysis by independently reviewing and estimating the specific elements of each Offeror’s proposed cost estimate to determine whether the estimated proposed costs elements are realistic for:

- the work to be performed;
- reflect a clear understanding of the requirements; and
- consistency with the unique methods of performance described in the Offeror’s technical proposal.

A cost evaluation will not be performed on Offerors whose Technical Proposal is not deemed technically acceptable.

1.7. Competitive Range

If USAID DI determines that discussions are necessary, USAID DI may establish a Competitive Range composed of only the most highly-rated proposals. USAID DI may exclude an offer from the competitive range if:

- it is so technically deficient as to essentially require a new technical proposal;
- it so unreasonably priced, in relation to more competitive offers, as to appear that there will be little or no chance of becoming competitive; or.

- it would require extensive discussions, a complete re-write, or major revisions such as to allow an Offeror unfair advantage over those more competitive offers.

I.8. Oral Presentations

As part of the evaluation, the TEC reserves the right to require Offerors to present key parts of their submitted proposals to the committee.

I.9. General Terms and Conditions

- **Evaluation:** Any proposal received in response to this solicitation will be reviewed strictly as submitted and in accordance with Evaluation Criteria here within.
- **Executive Order 13224 On Terrorist Financing:** Offerors are informed that FMI complies with U.S. Sanctions and Embargo Laws and Regulations including Executive Order 13224 on Terrorist Financing, which effectively prohibit transactions with persons or entities that commit, threaten to commit or support terrorism. Any person or entity that participates in this bidding process, either as a prime or sub to the prime, must certify as part of the bid that they are not on the U.S. Department of Treasury Office of Foreign Assets Control (OFAC) Specially Designated Nationals (SDN) List and is eligible to participate. FMI shall disqualify any bid received from a person or entity that is found to be on the List or otherwise ineligible.
- **Payment:** Subject to the terms of this solicitation, successful Offeror's will be awarded with an Indefinite Quantity Subcontract (IQS). No funding is obligated upon IQS award. Subcontractors shall be paid upon completion/acceptance of the required supplies/services as specified in any issued Task Orders. Subcontractors shall be paid not later than thirty (30) days after USAID DI's receipt of an acceptable invoice or USAID DI's acceptance of the completed products/services, together with any required documents. Drafts will not be honored.
- **Terms and Conditions:** Offerors are responsible for review of the terms and conditions described. All information in the RFP and negotiation process will be contractually binding for the selected Offeror.
- **Withdrawals of Proposals:** Offerors may withdraw proposals by written notice via email received at any time before the award.
- **Right to Select/Reject:** USAID DI reserves the right to select and negotiate with those Offerors it determines, in its sole discretion, to be qualified for competitive proposals and to terminate negotiations without incurring any liability. USAID DI also reserves the right to reject any or all proposals received without explanation.
- **Client Prior Approval:** The selected Offeror might be subject to funding agency approval before a subcontract can be awarded. Therefore, organizations are reminded that there may be delays for this process to be completed. In addition, should such approval not be given, a subcontract cannot be awarded.
- **Disclaimer:** This RFP represents an invitation for submission of proposals and does not legally obligate USAID DI to accept any of the submitted proposals in whole or in part, nor is USAID DI obligated to select the lowest priced proposal. USAID DI reserves the right to negotiate with any or all Vendors with respect to price, costs and/or scope of services. USAID DI has no contractual obligations with any Offerors based upon issuance of this RFP. This RFP is not an offer to contract. Only the execution of a written contract shall obligate USAID DI in accordance with the terms and conditions contained in such contract.
- **Protest:** In submitting a response to this RFP, 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 USAID DI for consideration, as USAID will not consider protests regarding procurements carried out by implementing partners. USAID DI, at its sole discretion, will make a final decision on the protest for this procurement.

- **Conflict of Interest:** Offerors must provide disclosure of any past, present or currently contemplated relationships with any parties associated with the issuance, review or management of this solicitation and anticipated award in or outside of BiH. Failure to provide full and open disclosure may result in USAID DI having to reevaluate selection of a potential vendor and/or result in termination of an award.
- **Work Product Presumptive USAID DI Property:** All writings, books, articles, computer programs, databases, source and object codes, and other material of any nature whatsoever, including trademarks, trade names, and logos, that are subject to copyright protection and reduced to tangible form in whole or in part by Subcontractor in the course of its service to USAID DI shall be considered a work made for hire, or otherwise USAID DI property. Upon executing an IQS agreement contemplated by this RFP and thereafter, Subcontractor agrees to take all actions and execute any documents that USAID DI may consider necessary to obtain or maintain copyrights, whether during the application for copyright or during the conduct of an interference, infringement, litigation, or other matter. Subcontractor shall identify all materials in which Subcontractor intends to exempt from this provision prior to the use or development of such materials.
- **Rights in Data:** The Subcontractor understands and agrees that USAID DI may itself and permit others, including government agencies of the United States and other foreign governments, to: reproduce delivered work product through, but not limited to, publication and broadcasting; permit the translation of work product, creation of other versions, and quotations there from; allow for further dissemination of any provided publications and materials; and, otherwise utilize the work product and any material(s) derived therefrom. The Subcontractor shall defend, indemnify, and hold harmless USAID DI, and the US Government and its agencies against all claims, suits, costs, damages, and expenses that may be sustained by reason of any scandalous, libelous, or unlawful matter contained or alleged to be contained in the work, or any infringement or violation by the work of any copyright or property right; and until such claim or suit has been settled or withdrawn, USAID DI may withhold any sums due to the Subcontractor under agreements executed as a result of this IQS RFP. Subcontractor agrees to specifically identify to USAID and USAID DI any and all computer software licenses (“including shrink-wrap”) as may be necessary to convey ownership of the work product to USAID and USAID DI. Subcontractor agrees that any and all computer software developed in the performance of this order using USAID DI monies shall, unless otherwise agreed, become and remain the property of USAID DI.
- **Reserved Rights:** All RFP responses become the property of USAID DI, and USAID DI reserves the right in its sole discretion to:
 - a. To disqualify any offer based on Offeror failure to follow solicitation instructions.
 - b. Waive any deviations by Offerors from the requirements of this solicitation that in USAID DI’s opinion are considered not material defects requiring rejection or disqualification, or where such a waiver will promote increased competition.
 - c. Extend the time for submission of all RFP responses after notification to all Offerors.
 - d. Terminate or modify the RFP process at any time and reissue the RFP to whomever USAID DI deems appropriate.
 - e. Issue an award based on the initial evaluation of Offerors without discussion.
 - f. Award only part of the activities in the solicitation or issue multiple awards based on solicitation activities.
 - g. Continue with competitively-selected subcontractors for specified subsequent follow-on or add-on work

- **Prohibited Sources:** Offerors may not offer or supply any products, commodities or related services that are manufactured or assembled in, shipped from, transported through, or otherwise involving any of the following countries: Cuba, Iran, North Korea, Syria. Related services include incidental services pertaining to any/all aspects of this work to be performed under a resulting contract (including transportation, fuel, lodging, meals, and communications expenses). 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 quotes include items from these entities please note that they will be deemed not technically responsive, and excluded from competition.

Section II. Scope of Work

2.1 Background

Following on previous successful USAID efforts with diaspora engagement in BiH, the USAID Diaspora Invest Project (DI or USAID DI Project), which launched in October 2022, fosters local communities' engagement with the diaspora and supports diaspora investment and knowledge transfer to catalyze and stimulate economic and social development of BiH. This five-year, \$15.7 million project is implemented by Financial Markets International, Inc. (FMI).

DI aims to attract and facilitate diaspora investment and know-how into local communities, provide financial and technical support to incoming diaspora investors, transfer knowledge from the diaspora back to their homeland, and expand access to finance for MSMEs. This will be achieved through a combination of actions structured in four main objectives:

- a) Strengthen local governments' abilities to engage diaspora in local economic development;
- b) Expand direct investment to high-potential diaspora and/or diaspora-related MSMEs, startups, and joint ventures;
- c) Stimulate transfer of diaspora knowledge and investment capital to local companies to support business growth and inspire social change; and
- d) Expand access to existing and new financial instruments that enable flow of private capital to MMSMEs operating in BiH.

The Activity expects the following results:

- Leveraging of \$50 million in new diaspora and private investment in BiH
- 2,000 new jobs created in diaspora-related companies
- A total of 500 MSMEs, startups, and diaspora joint ventures supported
- At least 30 local communities attracting diaspora knowledge and capital
- Increased sales and exports from market access enabled through diaspora engagement
- Creation of better local and national business enabling environments via high-level public-private dialogue between the diaspora and local businesspeople and government(s)
- Expansion of existing, and creation of new, financial instruments to support economic development.

Achieving and sustaining any development outcome will require the contributions of multiple, interconnected actors. The USAID DI project acknowledges that the involvement of multiple local partners in diaspora engagement is critical. USAID DI Project will work on each local system holistically, engaging the actors (local government units, civil society organizations, local diaspora organizations, private organizations, education institutions, and others), mapping their interrelationships, and understanding and modulating the incentives that guide them.

This solicitation is issued under DI's Local Ecosystem Procurement Mechanism (LEPM) which will help empower local actors under all four Objectives of the project, support and strengthen ongoing efforts of diaspora engagement, and initiate new areas for cooperation between the diaspora and local MSMEs and communities.

USAID DI LEPM Subcontractors will: (i) improve capacity of LGUs to identify, support and link their local diasporas with local socio-economic development needs as well as anticipate and respond to the needs of diaspora investors and -related MSMEs and share knowledge with other LGUs, and (ii) support MSMEs via direct firm-level assistance, diaspora mentorship and export facilitation support; (iii) link second generation of diaspora with internship opportunities back home, (iv) enable direct contacts, networking and knowledge sharing between the diaspora and the home communities, and (v) expand access to finance for startups and early-stage MSMEs.

To these ends, USAID DI is seeking interested Offerors that will assist and support these activities towards their successful completion.

2.2 Scope of Work

The purpose of this RFP is to solicit proposals from Offerors able to provide Advisory Services to participating Local Government Units (LGUs) and Micro, Small and Medium Size Enterprises (MSMEs).

These Advisory Services include the following:

- A. Organizational Development of Local Government Units (LGUs) to Engage with the Diaspora
 - A.1 Develop LGU capacities to identify and mobilize diaspora members and local resources towards local economic development
 - A.2 Support LGU business-to-business (B2B) and community engagement between the local communities and diaspora members
 - A.3 LGU Capacity Assessments, Capacity Development and Sharing of Best Practices
- B. Provide Technical Assistance to Diaspora-owned and Diaspora-related MSMEs
 - B.1 Direct Provision of Technical Assistance to MSMEs
 - B.2 Strengthen MSME Capacities Through Diaspora Mentorship
 - B.3 Expand MSME Access to Markets Through Diaspora Facilitation
- C. Conduct an Internship Program for Young Diaspora Professionals in BiH Companies
- D. Organize Diaspora-related Business Conferences, Workshops and Learning Events
- E. Increase Access to Early-Stage Finance for MSMEs.

Offerors are invited to submit their proposals responding to any or all of the above areas of engagement.

2.3 Specific Tasks Under the Scope of Work

USAID DI is seeking qualified Offerors to perform the following services:

A. ORGANIZATIONAL DEVELOPMENT OF LGUs TO ENGAGE WITH THE DIASPORA

DI will partner with up to 30 Local Government Units (LGUs) during the project to strengthen the capacity of LGUs to proactively interact with and engage their diaspora in local economic development. DI will work to upgrade LGU skills and expertise for effective diaspora engagement, including: (i) developing LGU diaspora mapping capacities to identify and activate diaspora members in local economic development, (ii) support development of LGU communication and outreach strategies targeting its diasporas, (iii) assist the LGUs in identifying local commercial and social development opportunities for diaspora engagement, (iv) help design and implement activities that integrate diaspora into local development, such as business-to-business events, philanthropic, educational, cultural and

other activities, and (iv) support the learning process between the 30 participating LGUs through exchange of experiences, peer reviews, and learning events related to diaspora engagement.

To aid FMI/USAID in implementing this assistance, the successful offeror will provide the following services:

A.1 Develop LGU capacities to identify and mobilize diaspora members and local resources towards local economic development

- Assist in developing the diaspora mapping methodology outlining the approach, tasks and steps in identifying and activating diaspora members in local economic and social development.
- Support development of questionnaires and survey instruments designed to identify relevant diaspora members stemming from the partner localities and increase the LGU understanding of the capacities and socio-economic profile of diaspora members. The survey instrument shall provide sufficient information on key characteristics of diaspora members that can be systematically searched to better understand the composition and distribution of diaspora from a specific locality and matched to local engagement opportunities.
- Aid the LGUs in developing a mapping database, with definitions of data fields and proposals for data analysis that will increase the understanding of their “local” diaspora, their capabilities, needs and potential engagement interests.
- Support the LGUs in selecting adequate distribution and communication channels for deployment of survey instruments and developing outreach and communications strategies to help increase the participation and maximize the response rate from the diaspora members.
- Assist in the rollout of the survey instrument and aid the LGUs in analyzing the collected information to help with diaspora investor targeting, lead generation, identifying potential export and sourcing opportunities, and identifying potential social change agents in the diaspora.
- Propose a methodology for developing an inventory of local commercial and social opportunities for diaspora engagement in 30 partner LGUs. These may include: (i) local companies looking for diaspora investment, (ii) firms seeking diaspora export facilitation, (iii) firms interested in receiving mentorship or technical support from diaspora experts, (iv) companies interested in hosting diaspora interns, (v) civil society organizations and academic and other institutions seeking cooperation with the diaspora, (vi) local philanthropic initiatives seeking partnership with the diaspora, and (vii) other local engagement opportunities that can benefit from diaspora involvement.
- Support the rollout of this methodology in 30 LGUs to identify potential diaspora partners in the private sector, CSO, academic and other sectors of engagement. Rollout may include a combination of using publicly available information (registers, databases, business intelligence, social media, etc.) and field work and surveys in the 30 local communities.
- Assist the LGUs in creating a database/inventory of these engagement opportunities that will be searchable and will be used to match engagement opportunities with diaspora members identified through local diaspora mapping.

Description of deliverables:

Deliverables/ Milestones	Description	Timeframe	Total Indicative Duration
Deliverable A.1.1: Diaspora Mapping Methodology and implementation support in 30 LGUs	<ul style="list-style-type: none"> Review and adjust draft Diaspora Mapping Methodology consisting of questionnaire and mapping methodology and tools (up to 5 pages) Support Diaspora Mapping within 30 LGUs, including design and delivery of diaspora outreach campaigns together with each LGU, communication activities, etc. 	Roll out mapping for 30 LGUs, with continuous updates until July 2027.	Up to 5 days per each LGU for diaspora mapping support, total of 150 days (30 LGUs x 5 days).
Deliverable A.1.2: Diaspora Communication Strategies/Action Plans development and rollout in 30 LGUs	<ul style="list-style-type: none"> Work with each LGU on defining the Diaspora Communication and Outreach document (strategy, action plan / creation of new documents or an update to existing documents) Create final document version (i.e., diaspora communication action plan), based on the needs and the situation within each LGU (documents up to 12 pages max). Support implementation of each Diaspora Communication and Outreach document (strategy, plan etc.). Illustrative activities include technical assistance for the design and roll out of social media campaigns, adoption of new communication tools within LGU, creation of Diaspora Newsletter, support with outreach related to Diaspora Mapping, creation of LGU Value Proposition for Diaspora Business Engagement, etc. 	Start of activities in October 2023 with the implementation support to 30 LGUs – up to 20 LGU interventions in 2024 (i.e. support with outreach for Diaspora Mapping), followed up by 10 interventions in 2025.	Up to 3 days for the development of Diaspora Communication and Outreach document per each LGU, total of 90 days (30 LGUs x 3 days). Up to 7 days per LGU for implementation support, total of 210 days (30 LGUs x 7).
Deliverable A.1.3: Inventory of local commercial and social opportunities for diaspora engagement developed in 30 LGUs with data collection and analysis.	<ul style="list-style-type: none"> Finalize methodology for developing an inventory of local commercial and social opportunities for diaspora engagement within 30 LGUs (relying on available data and the collection of new data). Conduct data collection of local commercial and social opportunities for diaspora engagement including: (i) local companies looking for diaspora investment, (ii) companies seeking diaspora export facilitation, (iii) companies seeking mentorship or technical support from diaspora experts, (iv) companies interested in hosting diaspora interns, (v) civil society organizations and academic and other institutions seeking cooperation with the diaspora, (vi) local philanthropic initiatives seeking partnership with the diaspora, and (vii) other local engagement opportunities that can benefit from diaspora involvement. 	Methodology finalized and presented to LGUs during 2023 to start off the data collection process. Data collection finalized by March 2025 (with periodic rollouts TBD).	Up to 8 days for finalizing and adjusting the methodology. Up to 8 days for data collection and analysis per each LGU, total of 240 days (30 LGUs x 8).
TOTAL			Up to 698 days

A.2 Support LGU business-to-business (B2B) and community engagement between the local communities and diaspora members

- In cooperation with partner LGUs, develop a checklist for conducting business-to-business (B2B) events between the local private sector representatives and diaspora businesspeople and professionals and outline the full lifecycle of the B2B activity stream including preparatory, implementation and aftercare support for B2B participants.
- Help align the LGU communications and marketing strategy to the B2B event business goals to define a set of SMART marketing goals to support them.

- Assist the LGU in profiling the potential diaspora investors and identify their needs and interests and develop diaspora investor and buyer loyalty/retention strategies to preserve current diaspora investor base and build brand loyalty.
- In cooperation with LGUs, develop a work plan and timetable providing an outline of the set of activities to select, audit and train companies participating in the B2B activities (“Diaspora Marketplace”).
- Prepare MSMEs to participate in B2B events with development of readiness criteria including competitive capabilities, product readiness/suitability and compatibility with foreign markets, skills, knowledge, and resources to assess the selected MSMEs participating in the B2B events.
- Train/prepare MSMEs attending the B2B events to present, communicate and pitch their company and products with potential buyers.
- Help coach and mentor businesses on lead follow-up, preparation for meetings, and effective follow-up to facilitate deal closures.
- Provide promotional and media-related support before, during and after the B2B event.
- Identify, target, and establish contact with diaspora investors and foreign buyers, and prepare B2B and match-making events agenda which will include a minimum of three B2B meetings per MSME.
- Support conceptualization, development and execution of B2B and other business development events in 30 LGUs including:
 - Assist in identifying and engaging stakeholders (companies, diaspora business representatives, business development service providers (BDSPs), facilitators, representatives of educational and academic institutions, and media).
 - Conduct group and individual trainings for LGU teams on networking and full cycle communication.
 - Match diaspora business representatives with viable and qualified MSMEs identified through the inventory of local commercial and social opportunities.
 - Support the organization of the events including planning, procurements, promotion and execution.
 - Assist the LGUs with follow up communication.
 - Lead reflection exercise with LGU teams and DI within 30 days after the event is completed and develop action plan with opportunities for improvement and LGU graduation plan.
- Conduct follow-up with the companies and identified investors/buyers with the aim of achieving deals/transactions and further supervision and support post-event.
- Support companies to negotiate contracts with prospective foreign buyers; and achieve a minimum of one successful transaction per participating company from the facilitated B2B meetings.
- Highlight success stories for enterprises that managed to generate actual deals/transactions.
- Develop final exit report and presentation. The report should include all activities conducted, including relevant indicators of success, such as: LGU capacity progress, next year sliding scale plan and graduation plan. Include information on the number of MSMEs from the sector supported, number of MSMEs enabled to export, contacts with diaspora investors and foreign buyers, B2B meetings, main findings with key results, recommendations regarding the companies and how we can upgrade their products and enhance their export potential, challenges encountered, success stories, lessons learned (including risks, opportunities, and success factors), summary and conclusions.

Description of deliverables:

Deliverables/ Milestones	Description	Due Date	Total Indicative Duration
Deliverable A.2.1: Methodology for Diaspora Business Forums/B2B events	<ul style="list-style-type: none"> Review and update of the methodology for conducting Diaspora Business Forums/B2B events annually, including the checklist for conducting business-to-business (B2B) events. 	End of 2023.	Up to 8 days
Deliverable A.2.2: Rollout of 24 B2B events in 24 LGUs.	<ul style="list-style-type: none"> Create B2B event concepts with specific needs, sectors and niches for each participating LGU, along with the indicative budget. Design marketing collateral for B2B events. Identify and profile participants, including potential diaspora investors, aligning them with strategic interests of LGUs. Support preparation of local MSMEs to participate in B2B events. Match diaspora business representatives with viable and qualified MSMEs identified through the inventory of local commercial and social opportunities and/or LGU contacts. Support LGUs in logistical organization of the events. Conduct follow-up with the companies and identified investors/buyers with the aim of achieving deals/transactions and further monitoring and support post-event. 	6-8 events annually until 2027; exact dates TBD.	Up to 8 days per LGU, total of 192 days (30 LGUs x 8).
TOTAL			Up to 200 days

A.3 LGU Capacity Assessments, Capacity Development and Sharing of Best Practices

- Support 30 LGUs during the annual process of capacity assessment (“Capacity Scorecards”) and follow-up implementation of capacity development programs to address gaps identified in Capacity Scorecard assessments.
- Assist LGUs in performing detailed SWOT analyses, gaps and opportunities analysis and developing Capacity Improvement Action Plans guided by Capacity Scorecard assessments with specific deadlines.
- Help LGUs identify competitive advantages – what sets the LGU apart from other competing localities in terms of investment attraction, with particular emphasis on Diaspora Direct Investment (DDI). Identify the strengths and weaknesses of the LGU internal processes to help improve their performance.
- Support development of LGU-specific value proposition and competitive edge for each of the 30 participating LGUs.
- Help develop LGU communications and outreach plans for diaspora engagement.
- Identify short and long-term goals, objectives, and KPIs for LGUs and track progress through the DI’s Capacity Scorecard.
- Help develop and/or enhance diaspora-related LGU organizational/coordination structures.
- Support development of diaspora related LGU financial plans, projections, resource plans and revenue plans.
- Assist with development of LGU annual action plans with detailed activities and milestones.

- Support the creation of LGU Diaspora Community of Practitioners to aid in the exchange of experiences and best practices between the LGU participants.
- Help set up organizational structure and internal communication systems of the Community of Practitioners.
- Assist the participating LGUs in setting and developing agendas for Community of Practitioners meetings and events.
- Support organization of at least five meetings of the Community of Practitioners during the project.
- Support event management, logistics and promotion of the events.

Description of deliverables:

Deliverables/ Milestones	Description	Due Date	Total Indicative Duration
Deliverable A.3.1: Capacity assessments within each LGU conducted.	<ul style="list-style-type: none"> • Support 30 LGUs during the annual process of capacity assessment (“Capacity Scorecards”) 	Annually, to be conducted in September.	Up to 1 day per LGU, total of 30 days.
Deliverable A.3.2: Capacity building implemented within each LGU through group sessions or with individual LGUs.	<ul style="list-style-type: none"> • Support capacity building interventions within LGU Practitioners Network, including design of events, developing agenda and contents, and delivery of events. • Design and deliver capacity building blocks for set of LGUs or individual LGU assistance (including on-the-job support, if needed) in the areas including location branding, communications, outreach, investment promotion and facilitation, aftercare services, and policy advocacy for an enabling investment climate. 	Continuously, 2023 – 2027.	Up to 20 days total for at least 4 joint capacity building sessions LGU Practitioners' Network (4 events x 5 days). Up to 6 days per each LGU for targeted LGU capacity building interventions, total of 180 days (30 LGUs x 6 days).
TOTAL			Up to 200 days

B. PROVIDE TECHNICAL ASSISTANCE TO DIASPORA-OWNED AND DIASPORA-RELATED MSMEs

USAID Diaspora Invest Project will provide technical assistance (TA) to at least 300 early stage (up to 5 years old) diaspora-owned and diaspora-related companies. The key goal of this TA will be to enhance beneficiary companies’ performance, improve or expand developmental impact, and strengthen market linkages. The Activity intends to provide technical assistance to diaspora beneficiaries in four key categories:

- (i) Business intelligence and investment facilitation (start-up support), such as business environment information, sector and industry intelligence, assistance in selecting business partners and business service providers, business registration services, and location scouting;
- (ii) Manufacturing and service inputs/factor markets assistance, including access to finance facilitation, human resource management assistance, and supply-chain development support (e.g., raw materials and service suppliers);

- (iii) Strategy and operations, such as improving operational efficiency, business and management consulting, financial management, product and service development, research, development and innovation support, and corporate governance; and
- (iv) Market linkages, including marketing and promotional services, diaspora market linkages, international standards and certifications, and matchmaking and sales support.

The TA to MSME beneficiaries will be implemented either through (i) group workshops and training sessions lasting up to 2 workdays, or (ii) in-company interventions with dedicated assistance of up to a maximum of 10 workdays per each beneficiary.

To assist with the implementation of this activity, the successful offeror shall provide the following services:

B.1 Direct Provision of Technical Assistance to MSMEs

- Support the identification of eligible MSMEs satisfying the criteria set out by the Activity, including those pertaining to company age (up to 6 years old), diaspora status (diaspora-owned or co-owned firms), and sector (all manufacturing sectors, agribusiness, energy, and most service industries, including tourism, health, ICT, and value-adding Business Process Outsourcing - BPO industries).
- Refer the identified MSMEs to the relevant open calls for technical assistance provision.
- Implement the technical assistance to MSMEs as scoped by the USAID DI project team.
- Develop reports following the implementation of TA containing the assessment of gained knowledge prior and post TA provision, as well as highlighting challenges and obstacles to be addressed by participating SME.

Description of deliverables:

Deliverables/ Milestones	Description	Due Date	Total Indicative Duration
Deliverable B.1.1: Workshops for representatives of 150 companies receiving technical assistance designed and implemented.	<ul style="list-style-type: none"> • Design and implement up to 15 two-day workshops for diaspora-owned and diaspora-related MSMEs in cross-cutting functional areas including, but not limited to: (i) access to finance facilitation, (ii) human resource management, (iii) supply chain development, (iv) improving operational efficiency, (v) financial management, (vi) product and service development, (vii) R&D and innovation support, (viii) corporate governance, (ix) marketing and promotion, (x) sales support, and (xi) quality standards and compliance with market requirements. 	Start in 2023, with up to 4 workshops implemented each year until 2027	Up to 5 days for preparation and implementation of each workshop, total of 75 days (15 workshops x 5 days).
Deliverable B.1.2: In-company technical assistance interventions implemented in 120 MSMEs.	<ul style="list-style-type: none"> • Implement tailor-made in-company technical assistance and advisory interventions as scoped by the USAID DI for up to 120 MSMEs to support (i) implementation of international technical standards and certifications, (ii) marketing, branding and promotional services, (iii) business intelligence and investment facilitation, and (iv) manufacturing and service inputs assistance. 	Start in 2023, with up to 30 advisory interventions implemented each year until 2027	Up to 10 days for each advisory intervention, total of 1,200 days (120 interventions x 10 days).
TOTAL			Up to 1,275 days

B.2 Strengthen MSME capacities through diaspora mentorships

- Support in mapping, recruiting and engaging at least 25 diaspora mentors to provide mentoring technical assistance to at least 75 MSMEs.
- Develop and implement a methodology for identification and long-term engagement of diaspora mentors.
- Develop matchmaking methodology to ensure proper placement of mentors with appropriate MSMEs either based on region, sector or market.
- Coordinate closely with DI on the selection of MSMEs and ensure their readiness to participate in mentoring programs through the development of readiness criteria including MSME capabilities and capacity to absorb mentorship support.
- Support the logistics of implementing the mentorship program, including travel and accommodation for the mentors visiting BiH MSMEs. A minimum of one trip per mentor should be planned, with at least one short training delivered to participating MSMEs and/or a lecture/learning event organized in cooperation with the USAID DI project.
- Provide communication content to the USAID DI project on the diaspora mentor engagement, promote successes and ensure participation of the diaspora mentors in any requested DI outreach activities either virtual or in person during their stay in BiH.
- Prepare and submit end of year reflection reports clearly pointing to opportunities for improvement of the mentorship program and outlining how those optimizations can be reached.

Description of deliverables:

Deliverables/ Milestones	Description	Due Date	Total Indicative Duration
Deliverable B.2.1: Methodology for identification and long-term engagement of diaspora mentors and matchmaking with local MSME needs finalized.	<ul style="list-style-type: none"> • Develop a comprehensive methodology for identifying and engaging diaspora mentors who will provide long-term mentoring support to MSMEs. This methodology should outline the process for identifying potential mentors, assessing their expertise and suitability, and establishing mechanisms for long-term engagement and support. It should include guidelines for mentor selection, engagement strategies, and communication channels to maintain effective mentor-mentee relationships. • Develop a matchmaking methodology that ensures mentors are properly matched with suitable MSMEs based on criteria such as region, sector, or market. The methodology should consider the specific needs and goals of both the mentors and MSMEs to facilitate effective mentorship relationships. It should outline the process for evaluating the characteristics of mentors and MSMEs, conducting compatibility assessments, and making informed placement decisions. The matchmaking methodology should aim to maximize the potential for successful mentorship outcomes. 	November 2023	Up to 15 days
Deliverable B.2.2: At least 25 diaspora mentors mapped, recruited, and engaged to provide mentoring assistance to local MSMEs.	<ul style="list-style-type: none"> • Develop a strategy and implement a process for mapping, recruiting, and engaging at least 25 diaspora mentors who will provide mentoring technical assistance to at least 75 MSMEs. • Identify potential mentors within the diaspora community, conduct outreach efforts to attract their interest and participation, and facilitate their engagement in the mentorship program. • Conduct targeted communications, networking, and promotion activities to ensure the recruitment of 	Start in 2023, with at least 6-8 mentors identified and engaged each year until 2026.	Up to 2 days to identify and secure participation of each mentor, total of 50 days (25 mentors x 2 days)

Deliverables/ Milestones	Description	Due Date	Total Indicative Duration
	qualified mentors who possess relevant expertise and experience.		
Deliverable B.2.3: At least 75 MSME mentees selected based on readiness criteria and their preparedness to participate in the mentoring program.	<ul style="list-style-type: none"> Develop and implement a selection process to identify and choose at least 75 local MSMEs that meet the readiness criteria for participation in the mentoring program. The readiness criteria should include assessments of the MSMEs' capabilities, capacity to absorb mentorship support, and their commitment to actively engage in the program. The selection process should be transparent, fair, and consistent with the Offeror expected to (i) prepare and publish a call for mentee MSMEs, (ii) conduct evaluation and shortlisting of applicants, and (iii) select and onboard at least 75 mentee MSMEs. 	Start in 2024, with the mentee selection cycle repeated each year until 2027	Up to 20 days per each selection cycle, total of 80 days (4 cycles x 20 days)
Deliverable B.2.4: Coordinate and implement the diaspora mentorship program for at least 75 MSMEs	<ul style="list-style-type: none"> Take responsibility for coordinating and organizing the logistics of implementing the mentorship program. This includes making necessary arrangements for travel and accommodation for the diaspora mentors who will be visiting BiH to provide mentoring support to MSMEs. Ensure smooth logistics planning, including booking transportation, securing suitable accommodation, and addressing any other travel-related requirements. Proper coordination will contribute to the overall success and effectiveness of the mentorship program. Plan and execute at least one trip per mentor who will be visiting BiH as part of the mentorship program. Coordinate with the mentors, MSMEs, and the USAID DI project to schedule the trip and ensure its smooth execution. During each trip, arrange for a short training session for the participating MSMEs to enhance their knowledge and skills. Additionally, collaborate with the USAID DI project to organize a lecture or learning event that will provide valuable insights and opportunities for knowledge exchange. Develop and provide communication content to the USAID DI project to keep them informed about the engagement of diaspora mentors in the mentorship program. This includes sharing updates, progress reports, success stories, and any relevant information about the mentorship activities. Promote the achievements and positive outcomes of the mentorship program through various communication channels and platforms. Additionally, ensure the active participation of diaspora mentors in any requested DI outreach activities, both virtual and in-person, during their stay in BiH. Prepare comprehensive end-of-year reflection reports that critically evaluate the mentorship program's performance and outcomes. Identify areas where the program can be improved and optimized for better effectiveness and impact. The reports should highlight both successes and challenges encountered throughout the year. Propose strategies and recommendations for optimizing the mentorship program based on the identified opportunities for improvement. Submit the reports to the relevant stakeholders, including the USAID DI project, to guide future iterations of the program. 	Start in 2024, with at least 75 mentorships conducted until July 2027	<p>Up to 2 days for coordination and preparation for each mentor visit, total 50 days (25 mentors x 2 days)</p> <p>Up to 10 days for each mentor visit, total 250 days (25 mentors x 10 days)</p> <p>Up to 12 days of communications support for each annual mentorship cycle, total of 48 days (4 mentorship cycles x 12 days)</p> <p>Up to 5 days for the development of each annual mentorship report, total of 20 days (4 annual cycles x 5 days)</p>
TOTAL			Up to 513 days

B.3 Expand MSME access to markets through diaspora facilitation

- Support identification, recruitment and engagement of at least 20 potential export agents among the BiH diaspora that can assist at least 100 local MSMEs in placing their products and services on key international markets.
- Provide adequate onboarding to diaspora export agents to familiarize them with DI supported MSMEs offering.
- Systematize and catalogue a database of export agents and share it with USAID DI project for further circulation among partner LGUs and beneficiary MSMEs.
- Prepare MSMEs to participate in the diaspora export agent program with the development of readiness criteria including competitive capabilities, product readiness/suitability and compatibility with foreign markets, skills, knowledge, and resources to assess and select the MSMEs participating in the export agent program.
- Support the logistics and organize familiarization trips (FAM trips) by diaspora export agents to selected MSMEs, including the travel and accommodation for export agents visiting the BiH companies. A minimum of one trip per export agent should be planned, with at least one short training delivered to participating MSMEs and/or a lecture/learning event organized in cooperation with the DI project.
- Help coach and mentor MSMEs on export lead follow-up, preparation for meetings, and effective follow-up to facilitate export deal closures.
- Provide promotional and media-related support during and following the implementation of the export agent program.
- Conduct follow-up with the MSMEs and identified diaspora export agents with the aim of achieving export deals and monitoring of results.
- Support MSMEs and export agents in negotiating contracts with prospective foreign buyers.
- Match at least 100 MSMEs with diaspora export agents throughout the program.
- Highlight success stories for MSMEs that managed to generate actual export deals.
- Prepare and submit end of year reflection reports that should include all activities conducted, including relevant indicators of success. Include information on the number of MSMEs supported, number of MSMEs enabled to export, contacts with diaspora export agents, main findings with key results, recommendations regarding upgrading MSMEs export potential, challenges encountered, success stories, lessons learned including risks, opportunities, and success factors. The report shall include a plan for expanding the diaspora export agents roster, including a sustainability plan for their long-term engagement.

Description of deliverables:

Deliverables/ Milestones	Description	Due Date	Total Indicative Duration
Deliverable B.3.1: At least 25 diaspora export agents mapped, recruited, and engaged to provide export facilitation assistance to local MSMEs.	<ul style="list-style-type: none"> • Implement a process for mapping, recruiting, and engaging at least 20 diaspora export agents who will provide export facilitation technical assistance to at least 100 MSMEs. • Identify potential export agents within the diaspora community, conduct outreach efforts to attract their interest and participation, and facilitate their engagement in the diaspora export facilitation program. • Conduct targeted communications, networking, and promotion activities to ensure the recruitment of 	Start in 2023, with at least 5 export agents identified and engaged each year until 2026.	Up to 2 days to identify and secure participation of each export agent, total of 40 days (20 export agents x 2 days)

Deliverables/ Milestones	Description	Due Date	Total Indicative Duration
	qualified export agents who possess relevant expertise and experience.		
Deliverable B.3.2: At least 100 local MSMEs selected based on readiness criteria and their preparedness to participate in the export agent program.	<ul style="list-style-type: none"> Develop and implement a selection process to identify and choose at least 100 local MSMEs that meet the readiness criteria for participation in the export facilitation program. The readiness criteria should include assessments of the MSMEs' capabilities, capacity to absorb export facilitation support, and their commitment to actively engage in the program. The selection process should be transparent, fair, and consistent with the Offeror expected to (i) prepare and publish a call for mentee MSMEs, (ii) conduct evaluation and shortlisting of applicants, and (iii) select and onboard at least 100 mentee MSMEs. 	Start in 2024, with the MSME selection cycle repeated each year until 2027	Up to 20 days per each selection cycle, total of 80 days (4 cycles x 20 days)
Deliverable B.3.3: Coordinate and implement the diaspora export agent program for at least 100 MSMEs	<ul style="list-style-type: none"> Take responsibility for coordinating and organizing the logistics of implementing the export agent program. This includes making necessary arrangements for travel and accommodation for the diaspora export agents who will be visiting BiH to provide export facilitation support to MSMEs – familiarization visits (FAM trips). Ensure smooth logistics planning, including booking transportation, securing suitable accommodation, and addressing any other travel-related requirements. Proper coordination will contribute to the overall success and effectiveness of the diaspora export facilitation program. Plan and execute at least one FAM trip per export agent who will be visiting BiH as part of the program. Coordinate with the export agents, MSMEs, and the USAID DI project to schedule the FAM trip and ensure its smooth execution. During each FAM trip, arrange for a short training session for the participating MSMEs to enhance their knowledge and skills. Additionally, collaborate with the USAID DI project to organize a lecture or learning event that will provide valuable insights on export markets. Develop and provide communication content to the USAID DI project to keep them informed about the engagement of diaspora export agents in the program. This includes sharing updates, progress reports, success stories, and any relevant information about the export facilitation activities. Promote the achievements and positive outcomes of the export agent program through various communication channels and platforms. Additionally, ensure the active participation of diaspora export agents in any requested DI outreach activities, both virtual and in-person, during their stay in BiH. Prepare comprehensive end-of-year reflection reports that critically evaluate the export agent program's performance and outcomes. Identify areas where the program can be improved and optimized for better effectiveness and impact. The reports should highlight both successes and challenges encountered throughout the year. Propose strategies and recommendations for optimizing the export agent program based on the identified opportunities for improvement. Submit the reports to the relevant stakeholders, including the USAID DI project, to guide future iterations of the program. 	Start in 2024, with at least 100 export facilitation interventions conducted until July 2027	<p>Up to 2 days for coordination and preparation for each export agent visit, total 40 days (20 export agents x 2 days)</p> <p>Up to 10 days for each export agent visit, total 200 days (20 export agents x 10 days)</p> <p>Up to 12 days of communications support for each annual export agent program cycle, total of 48 days (4 export agent annual cycles x 12 days)</p> <p>Up to 5 days for the development of each annual report, total of 20 days (4 annual cycles x 5 days)</p>
TOTAL			Up to 428 days

C. CONDUCT AN INTERNSHIP PROGRAM FOR YOUNG DIASPORA PROFESSIONALS IN BiH COMPANIES

USAID Diaspora Invest Project intends to conduct an annual internship program for young diaspora professionals. The program will offer an opportunity to second-generation diaspora members to reconnect with their homeland and familiarize themselves with BiH business practices. The annual internship program will be conducted in several stages. The first phase will focus on the identification of the local MSMEs ready to host the diaspora interns. In the second phase, the DI project will create a simple and transparent application process that prioritizes second-generation diaspora that have had little opportunity to interact with BiH. The internship opportunities will be promoted throughout the diaspora community using traditional media channels, social media, and diaspora organizations. In the third phase, the project will focus on securing adequate mentorship for each intern, linking interns with one local mentor to help create a lasting bond.

To assist with the implementation of this activity, the successful Offeror shall provide the following services:

- Identify and secure host companies for diaspora interns, including the letter of commitment for each host company.
- Organize introduction meetings with host companies prior to publishing the Call for Interns including the eligibility and selection criteria.
- In collaboration with DI, publish the Call for Interns and structure and implement a transparent evaluation and selection procedure based on the criteria included in the call.
- Facilitate matching between the host companies and interns and create internship plans with each host company and selected intern.
- Provide technical and logistical support to interns in travelling to and from Bosnia and Herzegovina and during their stay in the country.
- Determine the timeline for intern tasks in coordination with USAID DI Project.
- Coordinate outreach efforts within the scope of activity with DI outreach personnel.
- Provide signed Internship Reports on successfully implemented internships by interns and host-companies.
- Prepare and submit annual reflection reports should include all activities conducted, including relevant indicators of success and indicate a path to sustainability for the diaspora internship program.

Description of deliverables:

Deliverables/ Milestones	Description	Due Date	Total Indicative Duration
Deliverable C.1: Implement 40 internships for young diaspora professionals in local MSMEs	<ul style="list-style-type: none"> • Research, identify, and secure participation of up to 40 suitable host companies interested in taking part in the diaspora internship program, and obtain a letter of commitment from each participating host. • Schedule and conduct meetings with the secured host companies to develop the Call for Interns and the eligibility and selection criteria. • Develop, publish, and promote the Call for Interns across the BiH diaspora communities. • Implement the evaluation and selection process based on the criteria specified in the call. 	Start in January each year (2024-2027), with the annual internship cycle completed in September.	Up to 10 days to identify and select host companies per each cycle, total of 40 days (4 annual cycles x 10 days) Up to 30 days for identification and selection of interns, total of 120 days (4

Deliverables/ Milestones	Description	Due Date	Total Indicative Duration
	<ul style="list-style-type: none"> • Conduct matching of interns with appropriate host companies based on the evaluation and selection process, and the collaborative creation of comprehensive internship plans with each host company and selected intern. • Provide support to at least 40 diaspora interns for travel arrangements to and from Bosnia and Herzegovina, as well as assistance during their stay in the country. • Develop a timeline and schedule for each intern in coordination with the USAID DI Project to ensure the smooth running of the internship program. • Monitor and oversee the implementation of a 4-week internship period for each of the 40 interns/host companies, process reimbursement for internship stipends and travel costs. • Coordinate all communications and outreach efforts related to the internship program with the DI outreach personnel to ensure consistency and effectiveness of messaging. 		<p>annual cycles x 30 days).</p> <p>Up to 30 days per each internship implementation cycle, total of 120 days (4 annual implementation cycles x 30 days).</p> <p>Up to 5 days for communications and outreach support per each annual internship cycle, total of 20 days (4 cycles x 5 days).</p>
TOTAL			Up to 300 days

D. ORGANIZE DIASPORA-RELATED BUSINESS CONFERENCES, WORKSHOPS AND LEARNING EVENTS

Organizing local and country-wide public events, conferences, business-to-business (B2B) meetings, and information sessions represents one of the cornerstones of USAID DI project outreach to the BiH diaspora community. Business-to-business and knowledge sharing events remain a crucial avenue for networking between the local and diaspora communities. The B2B events will be organized to generate investment and commercial leads, raise awareness of local businesses among the diaspora community, engage potential diaspora or diaspora-facilitated customers, raise awareness on USAID DI and its assistance offering, and network BiH businesspeople at home and abroad. The Activity will demonstrate clear and quantifiable returns on investment into B2B events with clear links established between B2B activities on one hand, and investment, trade, export, and other engagement outcomes generated on the other.

In addition to business networking events, the project will organize workshops, lectures and other learning events to enable transfer of knowledge from the diaspora into the BiH communities. These learning events will be structured as either workshops or lectures open to diaspora members with a relevant background and proven track record in their respective fields of work.

To assist with the implementation of this activity, the successful Offeror shall provide the following services:

- Prepare and submit to USAID DI project the concept notes for the event with clearly laid out objectives, participants, timelines and budgets to ensure timely organization of the events that are in line with USAID DI project scope and requirements.
- Identify and mobilize relevant diaspora members and ensure event participation of local participants that will include, depending on the focus of the event, representatives of the local

private sector, academia, civil society organizations, representatives of the public sector (municipal, entity or state-level), and other relevant representatives.

- Support the logistics and organize the event with the participation of diaspora and local participants and the representatives of the USAID DI project.
- Provide promotional and media-related support during and following the implementation of the events.
- Conduct follow-up with the participants to establish the results of the knowledge transfer and monitor any behavioral changes resulting from the events.
- Prepare and submit a reflection report following each event that should outline all activities conducted, including relevant indicators of success.

Description of deliverables:

Deliverables/ Milestones	Description	Due Date	Total Indicative Duration (Days)
Deliverable D.1: Four diaspora knowledge sharing workshops or conferences implemented with a duration of at least 8 hours	<ul style="list-style-type: none"> • Develop event concept note including a detailed plan for the event, with clearly outlined objectives, list of committed diaspora expert(s) conducting the knowledge transfer, proposed lists of local participants, schedules, and budgets. • Mobilize event participants including, but not limited to, those identified in the event concept. Ensure active participation of relevant local stakeholders that can benefit from diaspora knowledge sharing. • Conduct event management and logistics support, including securing the venue, arranging any transportation and accommodation, producing marketing collateral and event materials, coordination with USAID DI project representatives. • Create and implement a promotional campaign to garner attention for the event. This should include media engagement, press releases, social media promotion, and other marketing efforts. Post-event, this might also involve circulating event highlights, photographs, or videos through various media channels. • Produce an event report to detail the outcomes of the event, specifically focusing on the knowledge transfer that took place. Follow up with participants to understand their learnings from the event, monitor changes in behavior, attitudes, or practices as a result of the event, and document these findings. 	Ongoing 2024-27- event concept submitted at least 90 days prior to the planned event	Up to 30 days for event preparation and implementation, total of 120 days (4 events x 30 days)
Deliverable D.2: Twenty Diaspora Expert Lectures implemented with a duration of at least 2 hours	<ul style="list-style-type: none"> • Develop event concept note including a detailed plan for the event, with clearly outlined objectives, biography of diaspora expert conducting the lecture, proposed lists of local participants, schedule, and budgets. • Mobilize event participants including, but not limited to, those identified in the event concept. Ensure active participation of relevant local stakeholders that can benefit from the diaspora lecture. • Conduct event management and logistics support, including securing the venue, producing marketing collateral and event materials, coordination with USAID DI project representatives. • Create and implement a promotional campaign to garner attention for the event. This should include 	Ongoing 2024-27- event concept submitted at least 90 days prior to the planned event	Up to 8 days for event preparation and implementation, total of 160 days (20 events x 8 days)

Deliverables/ Milestones	Description	Due Date	Total Indicative Duration (Days)
	<p>media engagement, social media promotion, and other marketing efforts. Post-event, this might also involve circulating event highlights, photographs, or videos through various media channels.</p> <ul style="list-style-type: none"> • Produce a brief event report to detail the outcomes of the event, specifically focusing on the knowledge transfer that took place. 		
Deliverable D.3: Four thematic or sectoral B2B events organized to match business diaspora with local MSMEs	<ul style="list-style-type: none"> • Create B2B event concept addressing specific sectors and thematic areas, along with clearly, proposed lists of diaspora and local participants, schedule, and budgets. • Identify and profile potential diaspora investors, buyers or suppliers within the selected sectors/thematic areas. • Identify and profile local MSMEs and support their preparation to take part in the B2B events. • Match diaspora business representatives with viable and qualified MSMEs identified. • Conduct event management and logistics support, including securing the venue, producing marketing collateral and event materials, coordination with USAID DI project representatives. • Create and implement a promotional campaign to garner attention for the B2B event. This should include media engagement, social media promotion, and other marketing efforts. Post-event, this might also involve circulating event highlights, photographs, or videos through various media channels. • Conduct follow-up with the companies and identified investors/buyers with the aim of achieving deals/transactions and further monitoring and support post-event. 	Ongoing 2024-27 - event concept submitted at least 90 days prior to the planned event	Up to 30 days for event preparation and implementation, total of 120 days (4 events x 30 days)
TOTAL			Up to 400 days

E. INCREASE ACCESS TO EARLY-STAGE FINANCE FOR MSMEs

USAID DI project is focusing on assisting the BiH-based startups and early-stage MSMEs address a large, unmet financing gap. There are almost no formal institutions providing equity in the country and the minimum business age restrictions imposed by most lenders make it impossible for startups to get credit. The project is thus focusing on innovative mechanisms that can channel diaspora and other finance towards the startup and early-stage segment of the MSME sector. The project will thus implement activities that both stimulate the supply of diaspora and other types of finance through blended finance instruments, as well as increase the absorption of existing financial products and approaches by BiH businesses in the early stages of development.

The focus of USAID DI project’s activities will thus be on: (i) identifying opportunities for new early-stage finance and risk capital instruments for startups and MSMEs (such as crowdfunding, business angel investment, venture capital, non-bank finance, etc.), (ii) assessing the feasibility of these instruments in the local business context in BiH, (iii) developing a roadmap for the establishment of these instruments, (iv) identify the necessary technical assistance to be deployed to support the emergence of these instruments in the local market.

The successful Offeror will provide the following assistance:

- Identify and describe a key financing opportunity for startups and early-stage firms involving debt or equity finance that would narrow the financing gap currently faced by MSMEs in BiH. This concept will be submitted to USAID DI project for approval of further steps.
- Conduct market research and analysis to reveal market needs and gaps, and better understand the target audience, industry trends and regulatory requirements.
- Define the objectives and goals of the new financial instrument, outline the structure and features of the instrument, considering factors such as risk tolerance, desired returns, and investors preferences.
- Suggest the eligibility criteria for companies seeking to access the instrument.
- Assess any compliance risks in terms of relevant laws and regulations governing the development and deployment of financial instruments, including securities laws, disclosure requirements, and investor protection measures.
- Determine the valuation methodology and pricing strategy for the instrument, considering factors like company stage, growth prospects, and market conditions.
- Identify potential financial institutions, NBFIs or other partners willing to test the instrument, gather feedback, evaluate performance and make necessary adjustments to the instrument.
- Engage potential partners (such as VC firms, angel investors, crowdfunding platforms, etc.) to generate interest and secure initial commitments.
- Assist in the preparation of legal documents, such as terms sheets, subscription agreements, offering memoranda, etc.
- Ensure a clear and transparent disclosure of risks, terms, and conditions associated with the investment.
- Help launch the instrument, making it available for investment and onboard investors, verify their eligibility and facilitate the investment process.
- Establish mechanisms to monitor the performance and progress of companies funded through the instrument.
- Continuously evaluate the effectiveness and efficiency of the instrument.

Description of deliverables:

Deliverables/ Milestones	Description	Due Date	Total Indicative Duration (Days)
Deliverable E.1: Roadmap for the development and rollout of business angel investment developed.	<ul style="list-style-type: none"> • Assess the existing policy and institutional framework in BiH to establish any existing regulatory or institutional constraints or market gaps preventing the roll-out of business angel investment in BiH. • Conduct interviews with the relevant institutions, market participants, potential providers of funding, as well as MSMEs that could benefit from the business angel instrument to establish the feasibility of the instrument in the local environment as well as provide an overview of advantages and opportunities for establishing business angel instruments in BiH with specific focus on diaspora investors. • Outline the areas for potential technical assistance and capacity development and list actions needed to support the development of business angel investment in BiH. The roadmap should include an inventory of technical assistance needs both in the area of policy development and reform (if needed), as well as technical assistance support to private 	End of 2023	30

Deliverables/ Milestones	Description	Due Date	Total Indicative Duration (Days)
	sector, business angel organizations, or other stakeholders to support business angel transactions in BiH.		
Deliverable E.2: Provision of technical assistance to implement the Roadmap.	<ul style="list-style-type: none"> • Technical assistance should take into account the activities proposed in the Roadmap for the development and rollout of business angel investment, while including the following actions: <ul style="list-style-type: none"> - Engage potential business angel partners to generate interest and secure initial commitments. - Establish a formal or informal group of business angels, with a particular emphasis on diaspora members. - Survey the existing startup ecosystem in BiH to identify and select a pipeline of potential business angel investment targets. - Assist the identified startups in increasing their investment readiness, refining business plans, and provide transaction advisory support, in cooperation with the USAID DI team. - Ensure a clear and transparent disclosure of risks, terms, and conditions associated with the investment. - Implement communications and outreach actions, including organization of events, to promote the instrument to the broader investment community at home and abroad, and startup environment. - Provide transaction support and incentivize investment by leveraging the USAID DI Diaspora Angel Facility grant program. - Establish mechanisms to monitor the performance and progress of companies funded through the instrument. - Continuously evaluate the effectiveness and efficiency of the instrument. 	Ongoing – 2024-27	Up to 50 days per year, total of 200 days (4 years x 50 days)
TOTAL			230

2.4 General Requirements

Offerors are required to submit proposals in accordance with the instructions in this solicitation to be eligible for an IQS award. Submission of a proposal in response to this solicitation signals the Offeror’s agreement with the terms and conditions contained herein.

Upon IQS award, the Offeror will be invited to sign an IQS subcontract and conduct a kickoff meeting with the USAID DI project team. During the kickoff meeting, the Offeror and USAID DI will agree on the proper course of action, sequencing for anticipated Task Orders, and designation of points of contact from both ends. Subsequent kickoff meetings may be arranged upon issuance of follow-on Task Orders.

Subcontractors will be asked to submit a budget (i.e., task order cost proposal) for each follow-on Task Order for which they are selected. Budgets for Task Orders must be approved by USAID DI personnel. Similarly, all Task Order deliverables will require the approval and acceptance of the authorized USAID DI personnel.

Subcontractors will work in close coordination with the USAID DI management team, provide regular updates, and respond promptly to the needs and demands of the management team as the project and assignment evolves and progresses.

Subcontractors should pursue effective communications and timely deliverables.

The timeline for deliverables should be based on the proposed technical approach and methodology adopted by the Offeror; however, exact timelines will be established following each Task Order release and upon the close coordination with USAID DI and the needs of partner LGUs and MSMEs.

2.5 Personnel Requirements

The Offerors are required to propose the staffing plan and/or to describe the recruiting plan in the Proposal to respond to the anticipated Advisory Services described in the Scope of Work of this RFP.

Qualifications for the proposed personnel should align to the specific scope of work. In all cases, experience is desired in the area relevant and specific to the scope of work rather than merely years of general work experience.

Proposed personnel should be banded into Junior, Mid, and Senior level personnel with the following experience requirements per labor category – these categories should be the basis of the pricing model, as per the Offeror’s internal policies and rates structure:

- Junior – 1-3 years of experience in the area relevant to the scope of work
- Mid – 4-10 years of experience in the area relevant to the scope of work
- Senior – 10+ years in the are relevant to the scope of work.

The Offeror does not have to propose personnel of all levels of experience. Proposed personnel should be within these categories.

The Offeror needs to have the capacity and ability to mobilize experts in the desired fields immediately after each Task Order. Even if the experts are not identified at the proposal preparation phase, the Offeror should have access to readily available field experts that could be proposed for each Task Order.

The Offerors must provide all necessary logistical support, including travel arrangements (with required FMI/USAID DI Project clearances), IT and computer support, team planning facilitation, and report editing to its personnel during the entire period of IQS implementation and for the implementation of each Task Order.

The contracted Offeror(s) must bear primary responsibility for procurement, personnel, reporting, and other management related requirements of the IQS and Task Orders.

2.6 Expected Deliverables

This RFP contemplates the award of indefinite quantity type subcontracts with Task Orders to be issued thereunder and priced on a fixed price basis. The deliverables will be determined on a Task Order basis.

2.7 Deliverables Schedule

The deliverables schedule will be determined on the basis of Task Orders issued.

Attachment I: Sample Cover Letter

To: Administration and Finance, USAID Diaspora Invest Project
From: [Name of Offeror]
Reference: RFP-2023-04 – Advisory Services
Subject: [Name of Offeror]’s technical and cost proposals

Dear Madam/Sir,

[Name of Offeror] is pleased to submit its proposal in regard to the above-referenced request for proposals. For this purpose, we are pleased to provide the information furnished below:

Name of organization’s representative: _____
Name of Offeror: _____
Type of organization (company, NGO, etc.): _____
Taxpayer identification number: _____
UEI Number: _____
Address: _____
Telephone: _____
Email: _____

As required, we confirm that our proposal, including the cost proposal will remain valid for 90 calendar days after the proposal deadline.

We are further pleased to provide the following annexes containing the information requested in the RFP:

[Offeror: It is incumbent on each Offeror to clearly review the IQS RFP and its requirements. It is each Offeror's responsibility to identify all required annexes and include them if required]

Sincerely yours,

Signature

[Name of organization’s representative]
[Name of Offeror]

Attachment II: Guide to Creating a Cost Proposal for a Fixed Price Contract

The purpose of this attachment is to guide Offerors in creating a budget for their Cost Proposal. Because IQS subcontracts and follow-on Task Orders will be funded under a United States government-funded project, it is important that all Offerors' budgets conform to this standard format. It is thus recommended that Offerors follow the steps described below.

1. Design the technical proposal. Offerors should examine the market for the proposed activity and realistically assess how they can meet the needs as described in this RFP, specifically in Section II. Offerors should present and describe this assessment in their Technical Proposals.

2. Determine the basic costs associated with each deliverable. Budgets should provide the best estimate of the costs associated with each deliverable, which should include labor and all non-labor costs, e.g. other direct costs, such as fringe, allowances, travel and transport, etc. The following cost elements should be used in preparing the budget:

- a. Labor: Proposed staff functional positions, daily rates, number of person-days needed to accomplish the work. The daily rate is derived by dividing base annual salary exclusive of fringe benefits, incentives, bonuses, overtime, allowances and differentials by 260 days. The rates shall be unloaded rates. Fringe benefits should be budgeted separately.

Selected vendors will be requested to provide a signed biodata form for any proposed staff named in the budget. USAID DI reserves the right to request additional documentation that supports the rate provided.

- b. Fringe Benefits: Fringe benefits shall be based on labor law and organizational policy. USAID DI reserves the right to request a copy of the Offeror's fringe policy. An explanation of the fringe shall be included in the budget narrative.
- c. Travel and Transportation: Provide the number of trips, origin and destination of trips, estimated air fares, and other costs such as taxi fees.
- d. Per Diem: Local Offerors shall budget per diem associated with travel and transportation in accordance with locally established rules and regulations on per diem. Qualified international Offerors shall refer to the US Department of State per diem policy.
- e. Program costs: Costs of workshops, trainings, meeting sessions and related materials, printed materials, supplies, etc. should be included in the budget with line items specifying the individual costs.
- f. Other direct costs: Separate running costs, or other direct costs (ODCs) shall be broken down as applicable, e.g. rent, utilities, office supplies, communication. Justification should include total monthly cost and percentage of the proposed cost to this project and the basis of allocation.
- g. Indirect costs: All costs must be budgeted as direct costs. Indirect costs, e.g. overhead, management, administrative, Facilities and Administrative (F&A), General and Administrative (G&A) costs, will not be accepted.
- h. Taxes: This project is tax exempt. Budgets shall reflect the exclusion of any applicable taxes such as VAT.
- i. Profit or Fee: A "fee" may be proposed, but USAID DI reserves the right to determine the reasonableness of the fee as well as negotiate the amount and terms of payment. Organizations proposing a fee shall consider:

- complexity and innovation of the work to be performed;

- risk borne by the subcontractor and the subcontractor’s investment;
 - amount of any subcontracting which requires monitoring, especially international monitoring;
 - quality of its record of past performance of similar work that can be demonstrated;
 - industry profit rates in the surrounding geographical area for similar work;
 - length of the contract (short-term is less than 12 months, long-term exceeds 12 months);
 - clarity and cost reasonableness of the initial budget and budget narrative; and
 - fees charges to other clients.
- j. Defense Base Act Insurance (DBA) - referring to FAR 52.228-3 WORKER’S COMPENSATION INSURANCE (DEFENSE BASE ACT INSURANCE), if applicable to the Offeror, if not, do not include in the budget

All projected costs must be in accordance with the organization’s standard practices and policies.

Offers including budget information determined to be unreasonable, incomplete, unnecessary for the completion of the proposed project or based on a methodology that is not adequately supported, may be deemed unacceptable.

Under no circumstances may cost information be included in the technical proposal. No cost information or any prices, whether for deliverables or line items, may be included in the technical proposal. Cost information must only be shown in the cost proposal.

3. Create a budget for the cost proposal. Each Offeror must create a budget using a template provided in Attachment IV: Deliverables Budget for Cost Proposal. The budget period should follow the technical proposal period.

4. Write Cost Notes. The spreadsheets shall be accompanied by written notes that explain each cost line item and the assumption why a cost is being budgeted as well as how the amount is reasonable. Any assumptions should be clearly stated. The information in the narrative should be in sufficient detail to allow a complete analysis. This should include a complete breakdown of cost elements associated with each line item and those costs associated with any proposed subcontract. Be sure to include data and/or methodologies to support cost estimates. The budget narrative shall be presented in such a way as to be easily referenced from the budget and should provide sufficient information so that USAID DI may review the proposed budget for reasonableness.

Attachment III: Administrative Annexes

Offerors should complete the below and submit the signed Annex with the proposal:

- A. Evidence of Responsibility
- B. Declaration on Financial Stability
- C. Offerors' Declaration on Conflict of Interest (Organizational)
- D. Certification Regarding Lobbying
- E. Certification Regarding Terrorist Financing, Implementing Executive Order 13224

A. Evidence of Responsibility

[Offeror Name] is a [Summary of organization, registration country, status, and snapshot of capabilities].

[Next provide a snapshot of subcontractor's management structure, and management practices to ensure quality and effective performance (technical and financial). Please remove this after providing the snapshot.]

Our company history and extensive experience provides a foundation that [Offeror Name]:

- Has adequate financial resources or the ability to obtain such resources as required during the performance of the contract
- Is able to comply with the required or proposed delivery or performance schedule, taking into consideration all existing commitments, commercial as well as governmental
- Has an outstanding record of performance
- Has an outstanding record of integrity and business ethics
- Has the necessary business organization, experience, accounting and operational controls and technical skills or the ability to obtain them
- Has the necessary equipment and facilities, or the ability to obtain them
- Is otherwise qualified and eligible to receive an award under applicable laws and regulations.

[Offeror Name] is pleased to present its proposal for the USAID Diaspora Invest Project which may be discussed with any of the following individuals. The below individuals are authorized to represent [Offeror Name] in negotiation of this offer in response to RFP-04-2023:

Name of authorized person, title: _____

Insert address: _____

Insert telephone: _____

Insert email address: _____

B. Declaration on Financial Stability

We, the undersigned, [Offeror name] hereby provide the following Declaration:

- We understand the financial flows and payment schedule of the USAID Diaspora Invest Project (most importantly the principle of the project reimbursing costs only after the completion of deliverables);
- We have the necessary liquidity and financial stability to implement the project activities and budget without the need for advances or other financial support directly from the project.
- Our financial statements are prepared and audited by the certified accountant;
- We adhere to all the rules and regulations regarding the financial statements and they include balance sheet, statement of income and retained earnings, statement of cash flows and notes to accounts;
- The financial statements are prepared and presented in accordance with the generally accepted accounting principles and audit is performed in compliance with the widely accepted auditing standards.

The above information along with the attached supporting documents provides you with enough evidence to ensure the financial stability of our organization/company.

Signature: _____

Name: _____

Title: _____

Date: _____

C. Offerors' Declaration on Conflict of Interest (Organizational)

For the purposes of this Declaration, the term "Organizational Conflict of Interest" – OCI - in relation to this procurement means that the Offeror:

- (1) Is not biased because of their financial, contractual, organizational, or other interests which relate to the work under this Subcontract, and
- (2) Do not obtain any unfair competitive advantage over other parties by virtue of their performance of this Subcontract.
- (3) Certify that they are not aware of any matter that might limit their ability to work on contracts and related actions in an objective and unbiased manner or which might place their organization in a position of a conflict, actual, potential, or apparent, between their responsibilities as a support contractor.
- (4) In making this certification, the Offeror has considered all financial interests of their organization, and employment arrangements (past, present, or under consideration) and, to the extent known by them, all the financial interests and employment arrangements of their employees' family members to the extent possible.
- (5) If, after the date of this certification, any person, firm, or other organization with which, to my knowledge, have a financial interest, or with which my organization has (or had) an employment arrangement, becomes involved in the acquisition the Offeror will be responsible for, they will notify the USAID Diaspora Invest Project of this apparent conflict of interest. In such case, until advised to the contrary, the Offeror will not participate further in any way (by rendering advice and making recommendations) on the applicable contract, proposal and/or related action.
- (6) Not participate in business activities with firms that competes with or seeks business from FMI and USAID Diaspora Invest Project, or when it could adversely affect their ability to carry out their services and responsibilities in the subcontract. Disclose to FMI if the Offeror works or will work with a competitor in the same area of the service provided to FMI.

The [Offeror Name] warrants that, to the best of the Offerors' knowledge and belief, there are no relevant facts or circumstances which would give rise to an organizational conflict of interest (OSI) and that the Offeror has disclosed all relevant information regarding any actual or potential conflict.

The Offeror agrees it shall make an immediate and full disclosure, in writing, to the USAID Diaspora Invest Project of any potential or actual organizational conflict of interest or the existence of any facts that may cause a reasonably prudent person to question the contractor's impartiality because of the appearance or existence of bias or an unfair competitive advantage. Such disclosure shall include a description of the actions the contractor has taken or proposes to take in order to avoid, neutralize, or mitigate any resulting conflict of interest.

With the signature below, [Offeror Name] certifies that the above statements are accurate, complete, and current.

Signature: _____
Name: _____
Title: _____
Date: _____

D. Certification Regarding Lobbying

The undersigned certifies, to the best of his or her knowledge and belief, that:

(1) No Federal appropriated funds have been paid or will be paid, by or on behalf of the undersigned, to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with the awarding of any Federal contract, the making of any Federal Cooperative Agreement, the making of any Federal loan, the entering into of any cooperative agreement, and the extension, continuation, renewal, amendment or modification of any Federal contract, subcontract, loan, or cooperative agreement.

(2) If any funds other than Federal appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with this Federal contract, subcontract, loan, or cooperative agreement, the undersigned shall complete and submit Standard Form-LLL, "Disclosure of Lobbying Activities," in accordance with its instructions.

(3) The undersigned shall require that the language of this certification be included in the award documents for all subawards at all tiers (including subcontracts, sub subcontracts, and contracts under subcontracts, loans, and cooperative agreements) and that all subrecipients shall certify and disclose accordingly.

This certification is a material representation of fact upon which reliance was placed when this transaction was made or entered into. Submission of this certification is a prerequisite for making or entering into this transaction imposed by section 1352, title 31, United States Code. Any person who fails to file the required certification shall be subject to a civil penalty of not less than \$10,000 and not more than \$100,000 for each such failure.

Statement for Loan Guarantees and Loan Insurance

“The undersigned states, to the best of his or her knowledge and belief, that: If any funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with this commitment providing for the United States to insure or guarantee a loan, the undersigned shall complete and submit Standard Form-LLL, "Disclosure Form to Report Lobbying," in accordance with its instructions. Submission of this statement is a prerequisite for making or entering into this transaction imposed by section 1352, title 31, U.S. Code. Any person who fails to file the required statement shall be subject to a civil penalty of not less than \$10,000 and not more than \$100,000 for each such failure.”

Signature: _____
Name: _____
Title: _____
Date: _____

E. Certification Regarding Terrorist Financing, Implementing Executive Order 13224

By signing and submitting this application, the prospective recipient provides the certification set out below:

1. The Recipient, to the best of its current knowledge, did not provide, within the previous ten years, and will take all reasonable steps to ensure that it does not and will not knowingly provide, material support or resources to any individual or entity that commits, attempts to commit, advocates, facilitates, or participates in terrorist acts, or has committed, attempted to commit, facilitated, or participated in terrorist acts, as that term is defined in paragraph 3.

2. The following steps may enable the Recipient to comply with its obligations under paragraph 1:

a. Before providing any material support or resources to an individual or entity, the Recipient will verify that the individual or entity does not (i) appear on the master list of Specially Designated Nationals and Blocked Persons, which list is maintained by the U.S. Treasury's Office of Foreign Assets Control (OFAC) and is available online at OFAC's website : <http://www.treas.gov/offices/eotffc/ofac/sdn/tl/sdn.pdf>, or (ii) is not included in any supplementary information concerning prohibited individuals or entities that may be provided by USAID to the Recipient.

b. Before providing any material support or resources to an individual or entity, the Recipient also will verify that the individual or entity has not been designated by the United Nations Security (UNSC) sanctions committee established under UNSC Resolution 1267 (1999) (the "1267 Committee") [individuals and entities linked to the Taliban, Usama bin Laden, or the Al Qaida Organization]. To determine whether there has been a published designation of an individual or entity by the 1267 Committee, the Recipient should refer to the consolidated list available online at the Committee's website: <http://www.un.org/Docs/sc/committees/1267/1267ListEng.htm>.

c. Before providing any material support or resources to an individual or entity, the Recipient will consider all information about that individual or entity of which it is aware and all public information that is reasonably available to it or of which it should be aware.

d. The Recipient also will implement reasonable monitoring and oversight

procedures to safeguard against assistance being diverted to support terrorist activity.

3. For purposes of this Certification-

a. "Material support and resources" means currency or monetary instruments or

financial securities, financial services, lodging, training, expert advice or assistance, safehouses, false documentation or identification,

communications equipment, facilities, weapons, lethal substances, explosives, personnel, transportation, and other physical assets, except medicine or religious materials."

b. "Terrorist act" means-

(i) an act prohibited pursuant to one of the 12 United Nations Conventions and Protocols related to terrorism (see UN terrorism conventions Internet site: <http://untreaty.un.org/English/Terrorism.asp>); or

(ii) an act of premeditated, politically motivated violence perpetrated against noncombatant targets by subnational groups or clandestine agents; or

(iii) any other act intended to cause death or serious bodily injury to a civilian, or to any other person not taking an active part in hostilities in a situation of armed conflict, when the purpose of such act, by its nature or context, is to intimidate a population, or to compel a government or an international organization to do or to abstain from doing any act.

c. "Entity" means a partnership, association, corporation, or other organization, group or subgroup.

d. References in this Certification to the provision of material support and resources shall not be deemed to include the furnishing of USAID funds or USAID-financed commodities to the ultimate beneficiaries of USAID assistance, such as recipients of food, medical care, micro-enterprise loans, shelter, etc., unless the Recipient has reason to believe that one or more of these beneficiaries commits, attempts to commit, advocates, facilitates, or participates in terrorist acts, or has committed, attempted to commit, facilitated or participated in terrorist acts.

e. The Recipient's obligations under paragraph I are not applicable to the procurement of goods and/or services by the Recipient that are acquired in the ordinary course of business through contract or purchase, e.g., utilities, rents, office supplies, gasoline, etc., unless the Recipient has reason to believe that a vendor or supplier of such goods and services commits, attempts to commit, advocates, facilitates, or participates in terrorist acts, or has committed, attempted to commit, facilitated or participated in terrorist acts.

This Certification is an express term and condition of any agreement issued as a result of this application, and any violation of it shall be grounds for unilateral termination of the agreement by USAID prior to the end of its term.

Certification of Recipient

By signing below the recipient provides certifications and assurances for the Certifications above:

RFP No. _____

Name of Offeror: _____

Name and Title: _____

Signature: _____

Date: _____

Attachment IV: Deliverables Budget for Cost Proposal

The MS Excel budget template is available here:

- [Attachment 4 - Deliverables Budget for Cost Proposal.](#)