

To: Offerors
Date: April 06, 2023
RFP: ATI-030
From: Procurement and Partnerships Team, Africa Trade, and Investment (ATI) Program; Implemented by DAI Global LLC
Subject: Request for Proposals (RFP) ATI 030: Capital Mobilization- Investor Data
Due: 1:00PM EAT (6:00AM EST) on May 04, 2023

Dear Offerors:

Enclosed is a Request for Proposals (RFP) to support the implementation of DAI's ATI project funded by the United States Agency for International Development (USAID). DAI invites firms to submit a proposal to support work under Capital Mobilization- Investor Data.

I. RFP Process and deadlines: This solicitation will result in the award of a Firm Fixed Price (FFP) type subcontract. We anticipate issuing one (or more) subcontract award(s) in the range of \$300,000 - \$400,000 resulting from the implementation of this agreement.

- a. Submission of Questions – Questions must be submitted no later than **1:00PM EAT (6:00AM EDT) on April 13, 2023**, via email to ATI_Procurement@dai.com
- b. Submission of Proposal – Proposal must be submitted no later than **1:00PM EAT (6:00AM EDT) on May 04, 2023**, via email to ATI_Procurement@dai.com, copying Brian Wanyagi (Brian_wanyagi@atiprogram.com) and Edwin Muli (Edwin_muli@atiprogram.com). The subject line of the email should be your organization name, followed by “Submission under ATI-030 Capital Mobilization- Investor Data. Please certify in your submission email a validity period of 60 days for the price (s) provided. In order to submit a proposal, offerors must have at least initiated the process to obtain a [SAM \(System for Award Management\) UEID \(Unique Entity ID\)](#). If the UEID has not yet been issued, offerors should note that in the submission and update ATI at ATI_Procurement@dai.com once it is issued. Please limit file submissions to 10 megabytes or less.

II. Composition of Proposal: The proposal should comprise the following submission documents. The Technical Proposal and Cost Proposal should be prepared as separate files for independent evaluation, as follows below. Technical proposals should be submitted as a ten (10) slide presentation, using 12-point standard font size. Graphics may be included, so long as text is clearly legible. If text or graphics are of poor resolution, the information provided may be excluded from consideration. Submissions in PowerPoint or PDF are acceptable, although PDF is preferred along with an accompanying PowerPoint document. Please provide a copy of your cost proposal in Excel format; offerors may use the attached cost/budget template

Part 1 – Technical Proposal

The technical proposal is composed of the following three (3) sections:

1. **Technical Approach** – Offerors will detail their approach to fulfilling the accompanying Statement of Objectives (SOO). The approach will clearly indicate how the proposed activities will

result in the successful completion of all anticipated outputs of work. The technical approach should clearly demonstrate the offeror's strategy to provide a solution that offers comprehensive coverage and insight into investment data gaps and priority areas for investment across Africa.

2. **Institutional Capacity** – Offerors should provide details about the experience, expertise, and capacity of their firm (or firms if partners are proposed) to implement the proposed approach and complete the work as described. This should also include past performance information for similar activities and/or experience in the region. The offeror should demonstrate their knowledge and experience in conducting research and data analysis, with a focus on investment and/or finance across Africa.

3. **Management Plan/Staffing Structure** – Offerors should include details of personnel who might be assigned to the activities described in the technical approach, as well as a clear management plan in narrative form for the development, review, and submission of deliverables, including a milestone schedule that indicates their proposed timeline for implementation. If a partnering arrangement is being proposed, please describe the nature of the arrangement, the specific technical value being contributed by each member of the team, and the appropriate management, oversight, and coordination controls to ensure successful delivery.

In addition to the above, please include the following inputs, which will not be counted as part of the 10-slide limit and format may be PDF or Word:

- One (1) to two (2) case study examples or qualifications statements of past performance relevant to this activity (limited to two (2) pages per example)
- CV(s) of any individuals proposed in the staffing plan to conduct this activity (limited to two (2) pages per individual). Please include the location where the individual is based.

A cover page will be considered a non-counting page, should offerors choose to include one. No additional annexes or documentation are requested at this time.

Part 2 – Cost or Price Proposal

The contract type for the presumptive subcontract will be Firm Fixed Price, awarded by DAI Global, LLC. Please include your total proposed fixed price along with details for specific deliverable pricing. Offerors should also include a cost breakdown of the hourly rates for proposed personnel, if applicable, with a build-up to their total proposed price or include substantiating price reasonableness documentation/justification. Cost breakdowns included will be utilized to determine price reasonableness. Offerors can use the attached cost/budget template for guidance but are not required to use it if the cost proposal captures the necessary elements (i.e., deliverables table with breakdown of how the deliverable totals were calculated). Note that the successful Offeror must be able to substantiate all costs and demonstrate the reasonableness of cost elements. Please limit file submissions to 10 megabytes or less.

III. Evaluation of Proposal: DAI will use best value determination for the award of this Request for Proposals. A best value determination means that, in DAI's estimation, the selected offer will provide the greatest overall benefit to DAI in response to the requirements stated in this RFP. DAI may also exclude an offer from consideration if it determines that an Offeror is "not responsible," i.e., that it does not have the management and/or financial capabilities required to perform the work required. Proposals will be evaluated against a stated number of factors,

including the overall proposed approach, past performance and other evidence substantiating the bidder's ability to deliver, and budget and time frame considerations.

1. **Technical Proposal:** The Technical Proposal will be scored and evaluated separately from the cost proposal. Technical panel reviewers will evaluate offerors on the following factors, consistent with the offerors' technical proposal:
 - a. **Technical Approach (40 points):** Points for this section will be awarded based on the information presented in the technical approach. The offeror will be scored based on its presentation of a clear approach that reflects the requirements of this specific activity but also incorporates the offeror's competencies. The technical approach should clearly demonstrate the offeror's strategy to provide a solution that offers comprehensive coverage and insight into investment data gaps and priority areas for investment across the continent. Preference will be given to concepts that demonstrate usefulness from an investor perspective, as well as identifying key data needed to match investor priorities in Africa. Proposals should also speak to the sustainability of the concept and preference will be given to concepts that demonstrate how the funding received will lead to a service being available on a commercial basis and/or maintained longer term to improve investor data availability and matchmaking on the continent.
 - b. **Institutional Capacity (35 points):** Points for this section will be based on information presented in the corresponding section and any submitted past performance case studies. The offeror should demonstrate their knowledge and experience in conducting research and data analysis, with a focus on investment and/or finance across Africa. Experience should, at a minimum, include previous projects or work focused on investment in Africa, with a robust track record working with data collection and analysis. Access to and existing relationships with relevant investors and/or data platforms will be a plus.
 - c. **Management Plan/Staffing Structure (25 points):** Points for this section will be awarded based on the qualifications of proposed staff, clear delineation of the roles and responsibilities of each proposed staff and each proposed firm (if firms are partnering), and the demonstrated efficacy and clarity of the management plan. Proposals should provide a clear management plan in narrative form for the development, review, and submission of all associated deliverables, including a proposed milestone schedule or GANTT chart. If the offeror is submitting a proposal with partners, the proposal should describe the nature of the arrangement (i.e. added technical value), the division of labor among the partners, and the appropriate management controls to ensure successful delivery. The offeror should clearly demonstrate that they can work in or travel throughout Africa as needed. The Management Plan should clearly outline where staff are located and, if any portion of the team or consortium will be remote, offerors should demonstrate how they will effectively supplement the work on-the-ground and coordinate with national and international staff.

2. **Cost Proposal:** Cost and associated cost build-up will be evaluated separately from the technical approach, with due consideration for realism, cost reasonableness, and allowability consistent with U.S. government cost principles. Evaluation for this section will be dependent upon all information presented by the Offeror in their deliverable table and supporting cost information, as well as its alignment with the proposed technical approach.

IV. Offeror's Agreement with Terms and Conditions: Please visit the <https://www.atiprogram.com/procurement-policies> website (scroll down to "Terms and Conditions") for RFP Terms and Conditions.

The completion of all RFP requirements in accordance with the instructions in this RFP and submission to DAI of the technical and cost proposals will constitute an offer and indicate the Offeror's agreement to the terms and conditions in this RFP and any attachments hereto. DAI is not required to accept and/or evaluate proposals that do not conform to the instructions of the RFP, and additionally, DAI may reject all proposals and not award a subcontract for this RFP. DAI reserves the right to award a subcontract without discussion and/or negotiation; however, DAI also reserves the right to conduct discussions and/or negotiations, which among other things may require an Offeror(s) to revise its proposal (technical and/or cost). By submitting an offer, Offerors agree to comply with the general terms and conditions for an award, including [Representations and Certifications](#) compliance. Offerors must provide full, accurate, and complete information in response to this solicitation. By submitting an offer, Offerors certify that they have not/will not attempt to bribe or make any payment to DAI employees in return for preference. Issuance of this RFP in no way obligates DAI to award a subcontract, nor does it commit DAI to pay any costs incurred by the Offeror in preparing and submitting the proposal. DAI reserves the right to award a subcontract to one organization or to issue multiple awards to different organizations based on the results of our evaluation.

Thank you,
DAI ATI Procurement and Partnerships Team
ATI_Procurement@dai.com