

**Consultancy Opportunity  
Request for Quotations (RFQ)**

RFQ Number: RFQ-Global-22-001- Program Support, Grants and Contracts, Operations, and Finance Consultants

Issuance Date: December 27, 2021

Deadline for Offers: Round 1: January 10, 2022

After the first round of RFQ submissions, offers will be evaluated on a rolling basis based on future needs.

Closing date of RFQ: January 31, 2023

Description: Request for Services for - Program Support, Grants and Contracts, Operations, and Finance Consultants

For: Counterpart International

Number of anticipated awards: Multiple

**Section 1: Instructions to Offerors**

1. **Introduction:** Counterpart requires the services of consultants in the areas of Program Support, Grants and Contracts, Operations, and Finance to provide surge support at Counterpart headquarters in Arlington, Virginia, remotely and for possible short-term assistance to its field offices worldwide. Counterpart seeks a diverse consultant/consulting firm pool that encourages individuals, sole proprietors/LLC, and small businesses to apply.

As a result of this RFQ, Counterpart anticipates issuing one or more Blanket Purchase Agreements (BPAs) to establish specific pricing levels and parameters for ordering. The Offeror will provide the services described in any ordering documents issued by Counterpart under this BPA.

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

2. **Offer Deadline and Protocol:** Offers must be received no later than 9:00 AM EST on the date listed below and must be submitted by email to [procurements.hq@counterpart.org](mailto:procurements.hq@counterpart.org).

Deadline for Round 1: January 10, 2022

After the first round of RFQ submission, offers will be evaluated on a rolling basis

*Subsequent rounds may be added on an as needed basis.*

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

3. **Questions:** Questions regarding the technical or administrative requirements of this RFQ may be submitted no later than 09:00 AM EST on January 3, 2022 by email to [procurements.hq@counterpart.org](mailto:procurements.hq@counterpart.org) for Round 1. Subsequent questions will be posted on at least a quarterly basis. Questions and requests for clarification—and the responses thereto—that Counterpart believes may be of interest to other offerors will be posted as an addendum to the RFQ.

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

4. **Specifications:** SECTION 3 of this RFQ contains the background, SOW and qualifications required for the opportunity.
5. **Quotations:** Offerors should provide a fully burdened fixed daily rate using the attached rate card. Pricing must be presented in U.S. Dollars. Offers must remain valid for not less than ninety (90) calendar days after the offer deadline.

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

- Cover letter, following the template in Section 4
- Completed Rate Card (Format in Section 5)
- Completed capabilities matrix with 1-2 paragraphs highlighting qualifications for applicable subject matter experts (SME) categories (Format in Section 5). (Note: It is not expected that the Offeror will apply to all SME categories).
- Current CV (three pages maximum)
- Counterpart’s Applicant Rate Sheet justifying the proposed rate. Please be prepared to substantiate the information provided on the form. (Section 6)
- Contact information for three references from employers or supervisors on previous consulting assignments for similar types of work within the past two (2) years.

6. **Taxes and VAT (Value Add Tax):** All prices must be presented inclusive of any taxes, duties, and VAT.
7. **Eligibility:** By submitting an offer in response to this RFQ, the offeror certifies that it is not debarred, suspended, or otherwise considered ineligible for an award by the U.S. Government. Counterpart will not award a contract to any entity that is debarred, suspended, or considered to be ineligible by the U.S. Government. Must have US work authorization for assignments to provide services in the United States, US work authorization is not required for assignments outside of the United States.
8. **Evaluation and Award:** The award will be made to a responsible offeror (s) whose offer follows the RFQ instructions, meets the eligibility requirements, and is determined via a trade-off analysis to be the best value based on application of the following evaluation criteria. The process will include evaluation of quotes, and shortlisted offerors may be invited for a virtual interview if Counterpart has no prior experience working with the offeror. Counterpart anticipates evaluating offerors separately by each SME category indicated and selecting a mixture of individual consultants and firms to meet Counterpart’s current and future needs.

Evaluation Criteria	Points
Technical experience and capabilities by SME area	80

International experience and foreign language skills	<u>20</u>
<b>TOTAL</b>	<b>100</b>

Interviews and reference checks will be rated as pass/fail.

Cost reasonableness will be evaluated as a second step after the above-listed criteria have been assessed.

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

Best-offer quotations are requested. It is anticipated that award(s) will be made solely based on these original quotations and possible interviews. However, Counterpart reserves the right to conduct any of the following:

- Counterpart may conduct negotiations with and/or request clarifications from any offeror prior to award.
- Counterpart may issue a partial award or split the award among various offerors, if in the best interest of Counterpart.
- Counterpart may cancel this RFQ at any time.
- Counterpart may reject any and all offers, if such action is considered to be in the best interest of Counterpart.

Please note that in submitting a response to this RFQ, the offeror understands that there are no other parties to this solicitation and the offeror agrees that any protest hereunder must be presented—in writing with full explanations—to Counterpart for consideration. Counterpart, at its sole discretion, will make a final decision on any submitted protest for this procurement.

9. **Terms and Conditions:** This is a Request for Quotations only. Issuance of this RFQ does not in any way obligate Counterpart to make an award or pay for costs incurred by potential offerors in the preparation and submission of an offer.

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

- (a) Counterpart’ standard payment terms are net 30 days after receipt and acceptance of any commodities or deliverables. Payment for ordering documents issued under any agreement resulting from this RFQ will only be issued to the entity submitting the offer in response to this RFQ and identified in the corresponding award; payment will not be issued to a third party.
- (b) Any award resulting from this RFQ will be in the form of a Blanket Purchase Agreement (BPA). For any BPA that is awarded, an ordering document can be issued – on an as needed basis – at the pricing levels established in the BPA. When the need arises for the services described in the BPA, the Counterpart Business Unit or project will issue an ordering document to the BPA-holder. If there are multiple BPA-holders as a result of this RFQ, the ordering document will be issued to the BPA-holder that presents the best value for that specific order, based on price, availability, and delivery time. Any BPA issued as a result of this RFQ will have a minimum duration of at least 12 months. The Consultant shall furnish the services described in any ordering documents issued by Counterpart under the BPA. The Counterpart is only obligated to pay for services to the extent ordering documents are issued under any BPA resulting from this RFQ.
- (c) No commodities or services may be supplied that are manufactured or assembled in, shipped from, transported through, or otherwise involving any of the following countries: Burma (Myanmar), Cuba, Iran, North Korea, (North) Sudan, Syria.

- (d) Any international air or ocean transportation or shipping carried out under any award resulting from this RFQ must take place on U.S.-flag carriers/vessels.
- (e) United States law prohibits transactions with, and the provision of resources and support to, individuals and organizations associated with terrorism. The Vendor under any award resulting from this RFQ must ensure compliance with these laws.

## **Section 2: Offer Checklist**

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

### **For Firms:**

- Cover letter, signed by an authorized representative of the offeror (see Section 4 for template)
- Completed Rate Card (Section 5)
- Completed Capabilities Matrix (Section 5)
- Illustrative CVs
- Rate back-up documentation, if applicable (per instructions in Section 1.5)
- 3 References

### **For Individuals:**

- Cover letter, signed by an authorized representative of the offeror (see Section 4 for template)
- Completed Rate Card (Section 5)
- Completed Capabilities Matrix (Section 5)
- CV of the individual
- Completed Counterpart Applicant Salary & Rate Sheet (Section 6)
- 3 References

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

#### **Introduction & Background**

Counterpart is soliciting quotations from eligible firms and individuals for as-needed, ad hoc procurement of Subject Matter Experts (SME)/ consultants for the following specialties: Program Support, Grants and Contracts, Operations, and Finance Consultant Specialists to provide as needed services or surge support at Counterpart headquarters in Arlington, Virginia, remotely and short-term technical assistance worldwide to its field offices. As a result of this RFQ, Counterpart anticipates issuing one or more blanket purchase agreements (BPAs)—to establish specific pricing levels and parameters for ordering these services. Offerors may quote one or more SME categories. Counterpart is seeking individuals, as well as firms that offer a suite of services to build the breadth and depth of consultant services available.

Counterpart anticipates the possibility of international travel for some of the SME categories. Travel will be specified in the scope of work for individual purchase orders and travel expenses and other applicable expenses priced at that time. Please indicate your willingness or constraints for travel as part of your capabilities statement (Section 5). Additionally, most of the required services can be performed remotely due to COVID-19 safety measures.

For each SME category, offerors may propose candidates and rates as mid- or senior level. The qualifications required for each level are consistent across all SME categories, and are:

#### **Mid-level**

1. A bachelor's degree required, Master's preferred in Law, Business Administration, Organizational Development, Economics, Accounting, International Development, or other relevant fields of study.
2. Minimum of five (5) years of experience in subject matter expertise category
3. Experience working on programs of U.S. Government agencies (USAID, DOS, USDA) as well as bilateral or multilateral donors, such as DFID/UKAID, SIDA, DFAT, UN Agencies, preferred.
4. Knowledge of best practices in SME category (ies)
5. Fluency in reading, writing, and speaking English required
6. French, Portuguese, or Spanish language skills a plus.
7. Ability to multi-task and work under pressure with attention to details.
8. Excellent cross-cultural skills, ability to work in a diverse, multi-cultural NGO environment, with respect, professionalism, and gender sensitivity.
9. Experience with Microsoft Excel, Word, and PowerPoint.
10. Experience in international development projects desirable.
11. Experience living or working overseas
12. Must have US work authorization for assignments provide services in the United States
13. US work authorization is not required for assignments outside of the United States.

## **Senior-level**

1. A bachelor's degree required, Master's preferred in Law, Business Administration, Organizational Development, Economics, Accounting, International Development, or other relevant fields of study.
2. Minimum of twelve (12) years of experience in subject matter expertise category
3. Experience programs of U.S. Government agencies (USAID, DOS, USDA) as well as bilateral or multilateral donors, such as DFID/UKAID, SIDA, DFAT, UN Agencies, preferred.
4. Demonstrated experience in best practices in SME category (ies) below
5. Fluency in English with strong reading, writing and verbal skills
6. French, Portuguese, or Spanish language skills a preferred; other languages a plus.
7. Ability to multi-task and work under pressure with attention to details.
8. Excellent cross-cultural skills, ability to work in a diverse, multi-cultural NGO environment, with respect, professionalism, and gender sensitivity.
9. Experience with Microsoft Excel, Word, and PowerPoint.
10. Experience in international development projects desirable.
11. Experience living or working overseas
12. Must have US work authorization for assignments provide services in the United States
13. US work authorization is not required for assignments outside of the United States.

Counterpart is contemplating the purchase or services under the following SME categories. For each SME category, the general scope of work is outlined below. Please note these are illustrative scopes of work, as the specific tasks will be outlined in each call issued under an awarded BPA. The description and illustrative needs of SME categories is followed by the quotation form, which must be submitted with each offer, filled out with the fully burdened daily rates proposed for each applicable SME category and level.

### **SME Categories and illustrative assignments (each bullet could be an example of assignment):**

Counterpart is contemplating the purchase or services under the following SME categories. For each SME category, the general scope of work is outlined below. Please note these are illustrative scopes of work, as the specific tasks will be outlined in each purchase order issued under an awarded BPA. The description and illustrative needs of SME categories are followed by the quotation form, which must be submitted with each offer, filled out with the fully burdened daily rates proposed for each applicable SME category and level.

### **SME Categories and illustrative assignments (each bullet could be an assignment):**

#### **A. Program/ Project Support (Technical and Operational)**

- Provide operational assistance with project start up including developing and tracking a startup matrix, overseeing the customization of a field operations manual, assisting in onboarding new staff, developing a startup procurement plan, assisting with registration, and setting up a bank account in country.
- Provide surge support to project operations functions in the HQ or field offices as needed.
- Provide operational assistance with project close downs including developing and tracking a closedown matrix, monitoring inventory disposition, conducting file audits, and tracking close down expenditure actuals vs budget.
- Serve as a part time Country Representative for Counterpart- (assist with registration, liaise with relevant government authorities, represent Counterpart with banks, provide in-country information as requested)
- Provide operations ad hoc support during project start up, implementation or close out
- Serve as program leader in temporary role in the field

- Provide technical support to project or new business capture efforts
- Advise on/ identify private sector and other strategic partnerships
- Proposal development for corporate partnerships in areas such as women’s leadership and economic empowerment, and food security

**B. Grants Management**

- Startup Grants Programs in field offices or grants close out.
- Tailor grants manual for project needs for clearance and approval
- Provide surge support to Program teams and/or field offices for any stage of the grant making life cycle, such as drafting grant manual, conducting pre-award surveys, preparing grant packages, or reviewing grant files.
- Conduct training of staff at grants start up, conducting pre-award surveys; grants management, “getting to grants” for potential applicants, sub-recipient monitoring and other areas for best practices in grants.
- Conduct review of field office grant practices and subrecipient monitoring, internal controls, make recommendations and conduct trainings.
- Advise and trouble-shoot compliance/noncompliance-related issues and problems.
- Assignments may include travel to Washington, DC metro area and/or international travel to field offices.
- Review subawards and manuals prior to issuance for compliance with donor regulations and Counterpart policies, and provide subaward management guidance as needed in consultation with GCC (Grants Contracts & Compliance) team members for consistency,
- Review grant packages prior to execution of grant agreements for compliance with donor regulations and Counterpart policies, and provide compliance and risk management clearance on satisfactory packages in accordance with authorization thresholds to be communicated by Counterpart,
- Provide guidance and oversight on planning, preparing, and clearing amendments to existing grants on documents including program description, deliverables, workplan and budget.

**C. Financial Compliance or Management**

- Conduct financial compliance reviews of grantee’s costs, particularly any irregularities.
- Provide temporary or surge support for field startup/close out financial and accounting services.
- Conduct internal review of field office or grantee’s or financial records.
- Assist in the planning and budgeting for the project program, advising role in the financial plan and budgets and ensuring that the assumptions, parameters, guidelines, and policies in planning are complied.
- Review grantee cost share documentation.
- Review and/or update financial compliance policies, procedures, and manuals.
- Prepare business development proposal budgets/cost volumes for assistance and/or federal contracts.
- Conduct a cost review of proposal budgets (assistance and acquisition).
- Advise on cost strategies or pricing various types of contract mechanisms at the proposal stage.
- Advise and trouble-shoot compliance-related issues and problems.
- Assignments may include travel to Washington, DC metro area and/or international travel to field offices.
- Analyze closeout awards, prepare financial closeout package of awards with clients, and record journal entries to closeout awards in accounting system.
- Support field offices with financial year-end closing planning and execution

- Internal financial compliance review
- Agreed upon financial procedures review
- NICRA (Negotiated Indirect Cost Rate Agreement) package preparation
- Surge support to oversee day-to-day management of international field finance operations at manager / director capacity
- Conduct reviews or investigations into financial irregularities, suspected fraud, or other compliance issues

**Procurement Support:**

- Conduct compliance review of procurements, including consulting agreements, for assigned projects
- Apply knowledge of best practices in procurement procedures to advise programs on procurement planning and execution
- Maintain procurement files and database records for awards in assigned portfolio
- Traveling to Counterpart's field office(s) to conducting field training and/or provide surge capacity for procurement functions
- Develop or revise job aids, guidance, and trainings for staff
- Conducts procurements

**General Compliance and Award Management (Under Federal Contracting or Assistance):**

- Provide support and guidance to HQ and field staff to assigned teams on award management and compliance with donor regulations,
- Review documents from a compliance and risk management perspective prior to submission for executive signature,
- Review proposal and cost applications for assigned portfolio for compliance with donor requirements and Counterpart policies,
- Contribute to the development and/or revision of templates and other tools, to assist program staff with award management and compliance with donor regulations and Counterpart policies
- Conduct reviews or investigations into financial irregularities, suspected fraud, or other compliance issues

**Section 4: Offer Cover Letter**

*The following cover letter must be completed and signed by the offeror:*

To: HQ Procurements  
Counterpart International, Arlington, VA

Reference: RFQ-Global-22-001- Program Support, Grants and Contracts, Operations, and Finance  
Consultants

To Whom It May Concern:

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

I hereby acknowledge and agree to all terms, conditions, special provisions, and instructions included in the above-referenced RFQ. I further certify that I am eligible to participate in this procurement under the terms of this solicitation and under USAID regulations.

Furthermore, I hereby certify that, to the best of my knowledge and belief:

- I have no close, familial, or financial relationships with any Counterpart staff members;
- I have no close, familial, or financial relationships with any other offerors submitting proposals in response to the above-referenced RFQ; and
- The prices in my offer have been arrived at independently, without any consultation, communication, or agreement with any other offeror or competitor for the purpose of restricting competition.

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

Name of Entity: \_\_\_\_\_

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

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

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

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

Telephone: \_\_\_\_\_

Tax Identification Number: (Business only) \_\_\_\_\_

**Section 5: Official Quotation and Rate Card**

Offeror’s (Business) Name: \_\_\_\_\_

Offeror’s Contact information Email Address: \_\_\_\_\_

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

Are you submitting as a business or an individual? \_\_\_\_\_

Are you a Small Business? What type? \_\_\_\_\_

Where are you based? \_\_\_\_\_

**SME Categories and Proposed Daily Rates**

This rate card incorporates all SME categories and levels. Offerors (both individuals and firms) are not expected or required to apply for all SME categories to be considered. Each SME category will be evaluated separately. The proposed rates are **fully burdened daily rates in US dollars** and are inclusive of any applicable taxes, overhead and fees. (Material expenses such as travel and per diem will be negotiated at the time of issuing a purchase order.) One day equals 8 hours.

SME Category	Burdened Rate – Mid-level Daily Rate	Burdened Rate – Sr.-level Daily Rate
1. Program/ Project Support (Technical and Operational)		
2. Grants Management		
3. Financial Compliance or Management		
4. Procurement Support		
5. General Compliance and Award Management (Federal Contracting)		
6. General Compliance and Award Management (Assistance)		
7. Fraud/Ethics Reviews or Investigations		

**Section 5a: Capabilities Matrix**

Offeror's (Business) Full Name: \_\_\_\_\_  
Offeror's Contact Information & Email Address: \_\_\_\_\_  
  
Authorized Signature: \_\_\_\_\_

Please indicate willingness to travel (internationally and domestic) and approximate duration as part of your capability statement for these SME categories.

*Please complete the capability statement for the applicable SME categories for which you intend to be considered. Include years of experience, breadth and/ or depth, responsibilities, experience in different countries and examples to demonstrate your experience.*

SME Category	Capability Statement
<b>1. Program/ Project Support (Technical and Operational)</b>	
<b>2. Grants Management</b>	

<b>SME Category</b>	<b>Capability Statement</b>
<b>3. Financial Compliance or Management</b>	
<b>4. Procurement Support</b>	
<b>5. General Compliance and Award Management (Federal Contracting)</b>	
<b>6. General Compliance and Award Management (Assistance/Grants)</b>	

SME Category	Capability Statement
7. Fraud/Ethics Reviews or Investigations	

1. Provide three (3) professional references. For each reference, please provide the following contact information: name, email, and phone number.
2. Name the foreign languages you can use in a professional setting and indicate your level of fluency. (Beginner, Intermediate, Advanced, Fluent)

Language	Written	Spoken	Reading

3. List the countries where you have experience (worked, lived, or supported projects).
4. Are you available to travel internationally? Are there any locations that you do not travel to?

**Section 6 Applicant Salary & Rate Sheet**

**Applicant Salary & Rate Sheet**

**1) Personal Information**

<b>Full Name</b>	
<b>Current Address or Home of Record</b>	
<b>Phone Number(s)</b>	
<b>Place of Birth</b>	<b>Citizenship (if non-US citizen, give work authorization status)</b>

**2) Salary History**

Position Title	Employer's Name & Contract	Dates of Employment		Annual Base Salary
		From (M/D/Y)	To (M/D/Y)	US Dollars (\$)

\* Give last two (2) years. List salaries separate for each year.

\* Exclude bonuses, profit-sharing, commissions, consultant fees, extra or overtime payments, post-differential, or any other allowances or benefits.

**3) Consulting Services Performed**

Title or Service Performed	Employer's Name & Contract	Dates of Employment		Days of Service	Daily Rate USD (\$)
		From (M/D/Y)	To (M/D/Y)		

\* Give last three (3) years. List rates separate for each year.

By signing below, I certify that all the information I provided above are true, accurate and verifiable.

\_\_\_\_\_  
Offeror's Signature

\_\_\_\_\_  
Date