

ATTACHMENT II

INSTRUCTIONS TO OFFERORS

GENERAL

Offerors must submit a complete proposal in response to the requirements described in the Statement of Work. An incomplete proposal will be deemed non-responsive and will not be considered.

Offerors are expected to review, understand, and comply with all aspects of this RFTOP. Failure to do so will be at the offeror's risk. All proposals received by the deadline will be reviewed for responsiveness to the specifications outlined in these guidelines and the technical and cost proposal format.

All proposals must be submitted in English in two separate parts: (a) technical and (b) cost or business proposal.

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

TECHNICAL PROPOSAL

The technical proposal shall follow the evaluation criteria listed in Attachment III. It should also include: 1) an illustrative first-year work plan; 2) an illustrative performance and monitoring plan (PMP); and 3) a management and staffing plan.

The total number of pages for the technical proposal, including management and staffing plan described below, shall not exceed 25 pages. Annexes are not included in the 25-page limitation. Offerors shall submit two annexes to the technical proposal: 1) resumes and references of key personnel and all long-term professional staff, whether employed by the prime contractor or subcontractors, which shall be limited to two pages per individual and 2) past performance information which shall not exceed three pages in total as further described below.

The technical proposal shall provide a full description of the proposed approach to tasks to achieve expected results for the five tasks described in the SOW. Successful proposals will not simply reiterate the RFTOP and will include projected timeframes requisite to achieve expected results. By intention, the SOW includes neither LOE estimates nor position descriptions. Rather, USAID expects offerors, working within the constraints of the ceiling price and period of performance, to utilize their expertise and experience in designing a technical approach which will best achieve the results described in the SOW and maximize the impact of the USAID-funded assistance. The technical approach shall include a description of what each assistance activity or combination of activities is expected to accomplish and will indicate how and to what extent those accomplishments will contribute to the achievement of the overall targets and benchmarks for the project.

Management approach/Project Staff

The Offeror must submit a management and staffing plan. This plan must adequately reflect the Offeror's strategy for performing the Statement of Work and accurately represent the work effort

included in the technical proposal. The plan must specify the composition and organizational structure of the core professional project team and describe each staff member's role, technical expertise, and estimated amount of time each will devote to the order. The Offeror should propose which positions should be designated as "key personnel" (not more than five) and provide resumes and letters of commitment for those candidates and all other long-term candidates. **Resumes, including references, shall be limited to two pages for each individual and, if possible, use a standardized format.** Resumes should demonstrate that the proposed person possesses the skills and knowledge to function as proposed on the project team. For each person proposed, provide a minimum of three references. For each reference, specify the relationship between the individual proposed and the reference and provide contact details including email address and phone number of each reference.

Biographical data sheets containing salary information should be attached to the cost proposal, not the technical proposal.

Past Performance

Past performance should be provided for up to five projects (ongoing or completed within the last three years) which best illustrate the Offeror's (and subcontractors', if appropriate) current qualifications, and the results achieved. The list of five projects shall include for each referenced contract: (i) the name of the organization, (ii) the project name, (iii) a brief project description, (iv) the period of performance, (v) the contract amount, and (vi) the name and telephone number and e-mail address of at least two contacts at the organization for which the service was performed.

Past performance will also include past performance of the Offeror in using small business concerns. Accordingly, the Offeror shall specifically address this in this part of their proposal unless the Offeror is already a small business concern.

If the Offeror encountered problems on any of the referenced task orders or contracts, it may provide a short explanation and the corrective action taken. Offerors shall not provide general information on their performance.

USAID may use past performance information obtained from sources other than those identified by the Offeror/subcontractor. USAID shall determine the relevance of similar past performance information. Past performance information will be used for both the responsibility determination and best value decision. Past performance information should not exceed three pages, is not included in the 25-page limit and should be submitted as an annex.

Branding Strategy

The Branding Strategy for this Task order shall be in accordance with Section M, Branding Strategy, Attachment I. As an annex to their technical proposal, offerors must submit a Branding Implementation Plan and Marking Plan. Both plans must implement the Branding Strategy for the activity and be in compliance with the requirements of ADS 320 Branding and Marking. Offerors may request certain exceptions in their Marking Plans based on programmatic needs. The successful offeror's Branding Implementation and Marking plans will be incorporated into this award.

Further Information/Resources

For more information about the MCHI, please see www.ifhealth.ru.

Please see <http://www.jhucp.org/europe/russia/healthyru2020.shtml> for more information about HR2020.

For more information on *PreventAIDS*, see [http://www.psi.org/where we work/russia.html](http://www.psi.org/where_we_work/russia.html).

For more information about the ARO program, see: www.siroststvo.ru.

The package of protocols, guidelines and standards developed under the MCHI is available online: <http://www.ifhealth.ru/en/resources/press/guidelines/>;
[http://www.ifhealth.ru/resources/section321/\(clinical](http://www.ifhealth.ru/resources/section321/(clinical) protocols available only in Russian)

Assessment of WIN project is available at the Development Experience Clearinghouse (www.dec.org) and available electronically at USAID/Russia

COST PROPOSAL

The cost proposal shall be submitted separately from the technical proposal. The cost proposal shall include:

A. Ceiling on Fixed Fee. The Task Order Contracting Officer and Contractor agree to negotiate a set dollar amount for fixed fee. In negotiating the fixed dollar amount for fee, the Cognizant Contracting Officer must consider the policies and factors for establishing fee in FAR 15.404-4 as well as any applicable USAID policy on establishing a fixed fee amount. In no event, however, may the amount of fixed fee in this Task Order exceed the ceiling on fixed fee established in Section B.8 of the IQC.

B. Offeror Employee Biographical Data Sheet (USAID Form 1420-1.7) for proposed non-U.S. personnel, containing salary history for the prior three years. (The BioData Sheets must be complete and properly certified and signed by both the employee and the offeror).

C. A detailed estimate of other direct costs which are considered necessary for completion of work under the order. Each line item of other direct costs shall be separately identified and shall include the basis for the cost estimate (e.g., DBA insurance shall specify the salaries and/or consultant fees which are subject to DBA, and the rate, and similarly, housing allowance shall specify the amount per estimated unit of rent).

Budget

Total Direct Labor
Salary and Wages \$ _____
Fringe Benefits \$ _____
Consultants \$ _____
Travel, Transportation, and Per Diem \$ _____
Equipment and Supplies \$ _____
Subcontracts¹ \$ _____
Allowances \$ _____
Participant Training \$ _____
Other Direct Cost \$ _____
Overhead \$ _____
G&A \$ _____
Material Overhead \$ _____
Total Estimated Cost \$ _____

¹ Individual subcontractors should include the same cost element breakdowns in their budgets as applicable.

Fixed Fee \$_____

Total Est. Cost Plus Fixed Fee \$_____

The basic definitions for the cost elements are found in the FAR and AIDAR or are self explanatory. Contracting Officers may include additional definitional elements and types of breakdown information, but should instruct offerors to include specific types of costs in particular budget lines (in the above template) in order for offerors to clearly understand which budget line items are to be used for the specific costs and why.

Budget Line Item Definitions and Illustrations²

Salary and Wages: FAR 31.205-6, AIDAR 732.205-46 and AIDAR 752.7007 provides for compensation for personal services. Direct salary and wages should be proposed in accordance with the offeror's personnel policies and meet the regulatory requirements. For example, costs of long-term and short-term personnel should be broken down by person years, months, days or hours.

Fringe Benefits: FAR 31.205-6 provides for allowances and services provided by the contractor to its employees as compensation in addition to regular wages and salaries. If fringe benefits are provided for as part of a firm's indirect cost rate structure, see FAR 42.700. If not part of an indirect cost rate, a detailed cost breakdown by benefits types should be provided.

Consultants: FAR 31.205-33 provides for services rendered by persons who are members of a particular profession or possess a special skill and who are not officers or employees of the contractor. For example, costs of consultants should be broken down by person years, months, days or hours.

Travel, Transportation, and Per Diem: FAR 31.205-46, AIDAR 731.205-46 and AIDAR 752-7032 provide for costs for transportation, lodging, meals and incidental expenses. For example, costs should be broken down by the number of trips, domestic and international, cost per trip, per diem and other related travel costs.

Equipment and Supplies: FAR 2.101 provides for supplies as all property except land or interest in land, FAR 31.205-26 provides for material costs, and FAR 45 prescribes policies and procedures for providing Government property to contractors, contractors' use and management of Government property, and reporting, redistributing, and disposing of contractor inventory. For example, costs should be broken down by types and units, and include an analysis that it is more advantageous to purchase than lease.

Subcontracts: FAR 44.101 provides for any contract entered into by a subcontractor to furnish supplies or services for performance of a prime contract or a subcontract. Cost element breakdowns should include the same budget items as the prime as applicable.

Allowances: AIDAR 752.7028 provides for differentials and allowances with further references to Standardized Regulations. For example, allowances should be broken down by specific type and by person, and should be in accordance with offeror's policies and these regulations.

² The regulatory references provided for each line item are initial ones that provide an introductory definition for these particular cost items, and are not intended to be a complete list of applicable regulations or policies. Also, the regulatory references assume cost-reimbursement contract types, and may vary or differ in their applicability given other types of contracts.

Participant Training: AIDAR 752.7019 and ADS 253 provides for participant training and training in development. For example, costs should be broken down by types and participants.

Other Direct Costs: FAR 31.202 and FAR 31.205 provides for the allowability of direct costs and many cost elements. For example, costs should be broken down by types and units.

Overhead, G&A and Material Overhead: FAR 31.203 and FAR 42.700 provides for those remaining costs (indirect) that are to be allocated to intermediate or two or more final cost objectives. For example, the indirect costs and bases as provided for in an offeror's indirect cost rate agreement with the Government, or if approved rates have not been previously established with the Government, a breakdown of bases, pools, method of determining the rates and description of costs.

Fixed Fee: FAR 15.404-4 provides for establishing the profit or fee portion of the Government pre-negotiation objective, and provides profit-analysis factors for analyzing profit or fee. For example, proposed fee with rationale supported by proposal of the profit-analysis factors.