



August 16, 2024

Request for Proposals # IQS-RFP-SCSA-DTA-1.2.1 Rapid Research and Analysis Services

Dear Sir or Madam,

The Armenian Branch office of Chemonics International Inc. (hereinafter referred to as “Chemonics”), under the USAID Strategic Communications Support Activity (hereinafter referred to as “The Activity”) USAID Contract No. 72011124C00001, is issuing an Indefinite Quantity Subcontract (IQS) Request for Proposals (IQS RFP) for the identification of a partner or partners who can support The Activity to conduct research and analysis engagements in a fast, flexible, and methodologically-sound manner. Requested services and illustrative capabilities of suitable vendors is described throughout this document. The attached IQS RFP contains all the necessary information for interested Offerors.

The overarching purpose of this RFP is to rapidly and responsively procure research and analysis services in support of the USAID Strategic Communications Support Activity. The Activity will support the Government of Armenia (GOAM) to build effective, streamlined, data-driven, and citizen-centered strategic communications systems, capacity, and practices. Specifically, the Activity will support GOAM in the following three main focus areas: 1) enable the institutional set-up and talent management of the public sector's streamlined strategic communications; 2) ensure the public sector has institutionalized systems and capacity for data-driven information management to inform strategic communications; and 3) foster citizen-centered strategic communications and public outreach.

The three interconnected components of the Activity will aim to achieve the following expected outcomes:

- Sustainable institutional structure and protocols are in place for effective internal, interagency, and external strategic communications;
- Improved government systems and technical and human capacities for effective, data-driven, message-tested, and targeted strategic communications are established, utilizing polling, focus groups, and social sentiment analysis;
- Effective strategies are developed for two-way communications, including feedback loops based on interactive discussions to generate stronger citizen engagement.

Companies or organizations should indicate their interest in submitting a proposal for the anticipated subcontract by sending an email indicating their intention to provide a response to Procurement@ArmeniaSCSA.com by 12:00 PM Yerevan time on 09 September 2024.

Following this RFP, Chemonics anticipates awarding an Indefinite Quantity Subcontract (IQS) and may issue accompanying TOs. During implementation of the work solicited in this RFP, the IQS instrument will serve as the governing subcontract for the work and relationship between the contractor and subcontractor, while the TOs instruments will be used by the contractor to order work from the subcontractor as needed, within the parameters of the IQS. Only IQS holders may bid on TOs under the IQS.

If necessary, Chemonics will provide answers to all relevant questions received in an amendment that will be emailed directly to all interested Offerors in receipt of this RFP.

This IQS RFP does not obligate Chemonics to execute a subcontract nor does it commit Chemonics to pay any costs incurred in the preparation and submission of the proposals. Furthermore, Chemonics reserves the right to reject any and all offers, if such action is considered to be in the best interest of Chemonics.

Sincerely,

Nazik Sahakyan
USAID Strategic Communications Support Activity

Request for Proposals

IQS RFP # IQS-RFP-SCSA-DTA-1.2.1

For the provision of

Rapid Research and Analysis Services

Contracting Entity:

The Armenian Branch of Chemonics International Inc. (Registration No. 264.060.04955, TIN 0006039, with address of 4/5 Amiryan street, 0010, Yerevan, Armenia)

Funded by:

United States Agency for International Development (USAID)

Funded under:

USAID Strategic Communications Support Activity (The Activity)

Prime Contract Number: 72011124C00001

******* ETHICAL AND BUSINESS CONDUCT REQUIREMENTS *******

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

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

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

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

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

Please contact the Activity Chief of Party Noel Martinez at nmartinez@ArmeniaSCSA.com with any questions or concerns regarding the above information or to report any potential violations. Potential violations may also be reported directly to Chemonics at to BusinessConduct@chemonics.com or by phone/Skype at 888.955.6881.

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List of Acronyms

CFR	Code of Federal Regulations
CO	USAID Contracting Officer
COP	Chief of Party
COR	USAID Contracting Officer's Representative
CV	Curriculum Vitae
FAR	Federal Acquisition Regulations
FDR	Fixed Daily Rates
IQS	Indefinite Quantity Subcontract
M&E	Monitoring and Evaluation
NICRA	Negotiated Indirect Cost Rate Agreement
NGO	Nongovernmental organization
RFP	Request for Proposals
SAF	Strategic Activities Fund
SOW	Scope of work
STO	Sub Task Order
UEI	Unique Entity Identifier
U.S.	United States
USAID	U.S. Agency for International Development
USAID/A	USAID Mission in Armenia
USG	U.S. Government
VAT	Value Added Tax

Section I. Instructions to Offerors

I.1. Introduction

Chemonics, the Buyer, acting on behalf of the U.S. Agency for International Development (USAID) and the USAID Strategic Communications Support Activity (the Activity), under contract number 72011124C00001 is soliciting offers from companies and organizations to submit proposals to participate with The Activity to provide ad-hoc rapid research and analysis services.

The Activity will support the Government of Armenia (GOAM) to build effective, streamlined, data-driven, and citizen-centered strategic communications systems, capacity, and practices. Specifically, the Activity will support GOAM in the following three main focus areas: 1) enable the institutional set-up and talent management of the public sector's streamlined strategic communications; 2) ensure the public sector has institutionalized systems and capacity for data-driven information management to inform strategic communications; and 3) foster citizen-centered strategic communications and public outreach.

The three interconnected components of the Activity will aim to achieve the following expected outcomes:

- Sustainable institutional structure and protocols are in place for effective internal, interagency, and external strategic communications;
- Improved government systems and technical and human capacities for effective, data-driven, message-tested, and targeted strategic communications are established, utilizing polling, focus groups, and social sentiment analysis;
- Effective strategies are developed for two-way communications, including feedback loops based on interactive discussions to generate stronger citizen engagement.

The anticipated IQS under this solicitation will help The Activity partner with an organization (or organizations) to create the ability to conduct myriad research efforts to establish baseline activity indicator metrics, analyze key factors of technical assistance, gauge any developments or shifts in public opinion, conduct general research, conduct segmentation and mapping research, provide ad-hoc MEL services, conduct polling, and manage stakeholder consultations. Information collected and analyzed will be used by the Activity to support GOAM initiatives as well as sharpen future programming for added impact.

Chemonics anticipates issuing an award to between one and five offerors, depending on proposal quality and offeror capabilities. The award(s) will be in the form of an indefinite quantity subcontract (IQS) with sub-task orders (STOs) issued priced on a firm fixed price basis (hereinafter referred to as “the IQS”). The successful Offeror(s) shall be required to adhere to the statement of work and terms and conditions of the IQS, which are incorporated in Section III herein.

Offerors are invited to submit proposals in response to this IQS RFP in accordance with **Section I Instructions to Offerors**, which will not be part of the IQS. The instructions are intended to assist interested Offerors in the preparation of their offer. Any resulting subcontract will be guided by Sections II and III. Chemonics will subsequently solicit individual orders for the scope of services requested. These individual orders are called STOs. While the IQS will contain the main terms and conditions and the pricing methodology to be used in negotiating STOs, each STO will contain specific information regarding the services being requested by The Activity, the period of performance, deliverables, and other details about the specific work ordered. STOs issued under the IQS will be on a **Fixed Price STOs** basis. The Offeror shall develop a budget (i.e., cost proposal) for each STO using the pricing methodology set forth in the IQS. Chemonics will not reimburse the Offeror for any costs associated with managing the IQS; each STO must stand on its own.

This IQS RFP does not obligate Chemonics to execute any STOs nor does it commit Chemonics to pay any costs incurred in the preparation and submission of the proposals. Furthermore, Chemonics reserves the right to reject any and all offers, if such action is considered to be in the best interest of Chemonics.

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

I.2. Offer Deadline

Offerors shall submit their offers no later than 12:00 PM Yerevan time on 09 September 2024. 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 Chemonics. Chemonics cannot guarantee that late offers will be considered.

I.3. Submission of Offers

Proposals must be submitted electronically in English.

A. Instructions for the Submission of Electronic Copies

Separate technical and cost proposals must be submitted by email no later than the time and date specified in I.2. The proposals must be submitted to procurement@armeniascsa.com.

The Offeror must submit the proposal electronically with up to 3 attachments (5 MB limit) per email compatible with MS Word, MS Excel, readable format, or Adobe Portable Document (PDF) format in a Microsoft XP environment. Offerors must not submit zipped files. Those pages requiring original manual signatures should be scanned and sent in PDF format as an email attachment.

The technical proposal and cost proposal must be kept separate from each other. Technical proposals must not make reference to pricing data in order that the technical evaluation may be made strictly on the basis of technical merit. The IQS RFQ number must be included in the subject line.

I.4. Requirements

To be determined responsive, an offer must include all of documents and sections included in I.4.A and I.4.B.

A. General Requirements

Chemonics anticipates issuing an IQS to selected Armenian companies or organizations, provided they are legally registered and recognized under the laws of Armenia and is in compliance with all applicable civil, fiscal, and other applicable regulations. Such a company or organization could include a private firm, non-profit, civil society organization, or university.

Companies and organizations that submit proposals in response to this IQS RFP must meet the following requirements:

- (i) Companies or organizations, whether for-profit or non-profit, must be legally registered under the laws of Armenia upon award of the IQS.

- (ii) 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 as suppliers of commodities and services.
- (iii) Companies or organizations must have a local presence in Armenia at the time the IQS is signed.
- (iv) 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 in accordance with information certified in the Evidence of Responsibility form included in the required certifications in Annex 3.¹

B. Required Proposal Documents

1. Cover Letter

The offeror's cover letter shall include the following information:

- i. Name of the company or organization
- ii. Type of company or organization
- iii. Address
- iv. Telephone
- v. E-mail
- vi. Full names of members of the Board of Directors and Legal Representative (as appropriate)
- vii. Taxpayer Identification Number
- viii. UEI Number
- ix. Official bank account information
- x. Other required documents that shall be included as attachments to the cover letter:
 - a) Copy of registration or incorporation in the public registry, or equivalent document from the government office where the offeror is registered.
 - b) Copy of company tax registration, or equivalent document.
 - c) Copy of trade license, or equivalent document.
 - d) Evidence of Responsibility Statement, whereby the offeror certifies that it has sufficient financial, technical, and managerial resources to complete the activity described in the scope of work, or the ability to obtain such resources. This statement is required by the Federal Acquisition Regulations in 9.104-1. A template is provided in Annex 3 "Required Certifications".
 - e) Applicable documents listed in I.4.A.

A sample cover letter is provided in Annex 1 of this IQS RFP.

2. IQS Technical Proposal

Offerors must prepare and submit an IQS-specific technical proposal which shall respond to and include the following comprise the following parts:

¹ If Offeror does not have a UEI number and is unable to obtain one before proposal submission deadline, Offeror shall include a statement in their Evidence of Responsibility Statement noting their intention to register for a UEI number should it be selected as the successful offeror or explaining why registration for a UEI number is not possible. Contact sam.gov to obtain a number: Further guidance on obtaining a UEI number is available from Chemonics upon request.

- Part 1: Technical Approach, Methodology and Case Studies (Prompts are attached as Annex 6). **This part may not exceed 15 pages** (four for general Technical Approach, five for Methodology, and 6 for Case Study Responses). Offerors are advised to apply their understanding of the services required to inform their technical approach and methodology, as well as to guide their responses to the Case Study prompts. When describing/detailing steps in response to each Case Study, offerors must apply the definitions and details found in each Service description. The Case Study prompts are included as an annex.
- Part 2: Management, Key Personnel, and Staffing Plan. **This part shall not exceed two pages**. CVs for IQS Manager/Project Coordinator, and Senior Technical Specialist must be included in an annex to the technical proposal and will not count against the page limit. This annex must be labeled “Key Personnel”. Offerors should also identify individuals that are current employees or consultants that may be relied on to serve in the expert consultant roles envisioned under STOs. CVs for these experts must be included in an annex to the technical proposal and will not count against the page limit. This annex must be labeled “Expert STO Consultants” and each position for which each individual may support must be clearly indicated on the CV. These positions are identified in the Scope of Work under “illustrative staffing”.

Offerors shall propose staff for the following Key Personnel positions necessary for the implementation of the general scope of work (please note STOs will necessarily include other positions. These two key personnel are named for the purposes of IQS oversight, STO administration, general project management, and general technical input as needed). Key Personnel are required to be current employees of Offeror organization. Proposed Key Personnel positions must include:

Title	Labor Category Responsibilities	Minimum Qualifications
IQS Manager/Project Coordinator	Responsible for overall administration of IQS agreement and STO management. Will coordinate subcontractor efforts to ensure responsiveness to STOs, staffing for all needs on STOs, and quality assurance of outputs and deliverables produced, ensuring they are aligned with requirements in IQS and STO.	<ul style="list-style-type: none"> • Four years of contract and project management experience. • Detail oriented • Experience managing diverse teams of experts and consultants. HR experience. • Proven operations, logistics, and administrative experience. • Experience working with donor entities.
Senior Technical Specialist	Provide general technical support in the preparation and design of STO approaches. Will liaise with any technical experts in support of STO completion. Will liaise with Activity staff on any questions	<ul style="list-style-type: none"> • Advanced degree in relevant technical area to the Services required. • Experience advising and providing high level technical advisory services.

	of programmatic or technical significance.	<ul style="list-style-type: none">• Experience and familiarity working with GOAM, CSOs, and donor entities.
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The key personnel are considered to be essential to the work being performed thereunder. Prior to replacing any of the specified individuals, the Subcontractor must immediately notify Chemonics reasonably in advance and must submit written justification (including proposed substitutions) in sufficient detail to permit evaluation of the impact on the program. No diversion or replacement of such personnel shall be made by the Subcontractor without the prior written approval of Chemonics and USAID, through Chemonics, if required. The listing of key personnel may, with the consent of the contracting parties, be amended from time to time during the course of this Subcontract to add, change, or delete personnel and positions, as appropriate. Chemonics may request the replacement of Subcontractor personnel at its sole discretion. Chemonics will not pay for early repatriation of departing long-term personnel, or fielding costs of replacement personnel, respectively, without the prior written approval of the USAID Contracting Officer through Chemonics

- Part 3: Corporate Capabilities, Experience, and Past Performance. This part may not exceed three pages.

Part 3 must include a description of the company and organization, with appropriate reference to any parent company and subsidiaries. Offerors must include details demonstrating their experience and technical ability in implementing the technical approach/methodology and the detailed work plan, as well as demonstrate their ability to perform services as outlined in scope and presented in Case Study Approaches. Additionally, offerors must include three past performance references of similar work (under contracts or subcontracts) previously implemented as well as contact information for the companies for which such work was completed. Contact information must include at a minimum: name of point of contact who can speak to the offeror's performance, name and address of the company for which the work was performed, and email and phone number of the point of contact. The Offeror shall use the Past Performance Template included in Annex 5. Chemonics reserves the right to check additional references not provided by an offeror.

Chemonics reserves the right to check additional references not provided by an offeror.

The sections of the technical proposal stated above must respond to the detailed information set out in Section II of this IQS RFP, which provides the background, states the scope of work, describes the deliverables, and provides a deliverables schedule.

3. Cost Proposal

The tables below contain the list of Key Personnel and Illustrative Consultant Daily rates, as well as sample envisioned costs of common services and engagements that may be ordered under this IQS. Offerors are requested to complete these tables and provide both a digital version (Excel spreadsheet) and a signed/stamped version (PDF) that are submitted separately from the technical proposal (Word or PDF). The per-unit price list detailed within the IQS will consist of all-inclusive fixed prices. No profit, fees, taxes, or additional costs can be added to these units after award. Prices shall be inclusive of:

- Salary cost or consulting fee of the individual(s) providing the services;
- Salary cost or consulting fee of the individual(s) performing key personnel services;
- Payroll costs (e.g., fringe benefits, social insurance, bank fees);
- Indirect costs applicable to labor (e.g., corporate overhead or management/administrative

fee);

- Indirect costs applicable to non-labor costs (e.g. corporate overhead or management/administrative fee applied to other direct costs/materials);
- Materials costs for completion of Services (as noted)
- Personnel costs;
- Defense Based Act Insurance (DBA) requirements
- Cost of fixing errors, omissions and responding to queries related to of Services provided as noted.
- Travel costs for Services as noted and any support personnel involved in the activity;
- Delivery costs for sending deliverables to Chemonics;
- Supervision and training costs;
- Costs associated with the preparation of Reports;
- Translation costs
- Reasonable profit or fee, if any.

Key Personnel and Illustrative Consultant Table (aligning with illustrative consultant positions in this RFP):

Key Personnel Position	Daily Rate (in AMD)
IQS Manager/Project Coordinator	
Senior Technical Specialist	

Illustrative Consultants and Technical Assistance:

All items listed under the "Technical Assistance Category" column are mandatory to be completed, if they are applicable to the proposal. For each Service Category, you can add additional relevant Technical Assistance Categories that align with the scope of the proposal.

SERVICE CATEGORY	TECHNIAL ASSISTANCE CATEGORY	NOTE	DAILY RATE (IN AMD)	BUDGET NOTES
1. Desk Research				
	Researcher			
	Subject Matter Expert			
	Other (<i>please add as needed</i>)			

2. Needs Assessments and Gap Analyses	Researcher/Research Analyst	Design development, tools development, descriptive analysis	
	Researcher/Research Analyst	Inferential Analysis	
	Data Analyst		
	Interviewer		
	Subject Matter Expert		
	Business Process Analyst		
	Financial Analyst		
	Other <i>(please add as needed)</i>		
3. Mapping (Stakeholders, systems, services, user flows, user journeys, data, database, etc.)	Researcher/Research Analyst		
	Subject Matter Expert		
	Data Analyst		
	System Analyst		
	User Experience Specialist		
	Database Specialist		
	Other <i>(please add as needed)</i>		

4. Benchmarking and Feasibility Studies	Researcher/Research Analyst		
	Subject Matter Expert		
	Business Analyst		
	Financial Analyst		
	Cost-benefit Analysis Expert		
	Other (<i>please add as needed</i>)		
5. Audience Segmentation Research	Researcher/Research Analyst	Design development, tools development, descriptive analysis	
	Researcher/Research Analyst	Inferential Analysis	
	Subject Matter Expert		
	Communications/Marketing Specialist		
	Statistician		
	Survey Designer		
	Interviewer/Focus Group Facilitator		
	Behavioral Scientist		
	Other (<i>please add as needed</i>)		

6. Business Process Analyses	Researcher/Research Analyst		
	Business Process Analyst		
	Change Management Specialist		
	Other (<i>please add as needed</i>)		
7. Surveys (Online, face-to-face, telephone, etc.)	Researcher/Research Analyst	Design development, tools development, descriptive analysis	
	Researcher/Research Analyst	Inferential Analysis	
	Data Analyst		
	Interviewer		
	Online Survey Administrator		
	Data Entry Specialist	if software is not used	
	Other (<i>please add as needed</i>)		
8. Polling (National, regional, targeted, public opinion, exit, push, rapid, etc.)	Researcher/Research Analyst	Design development, tools development, descriptive analysis	

9. Focus Group Discussions (FGDs)	Researcher/Research Analyst	Inferential Analysis		
	Data Analyst			
	Interviewer			
	Online Poll Administrator			
	Data Entry Specialist	if software is not used		
	Other <i>(please add as needed)</i>			
10. In depth and Key Informant Interviews	Researcher/Research Analyst			
	Focus Group Facilitator			
	Data Analyst			
	Subject Matter Expert			
	Recruiter			
	Other <i>(please add as needed)</i>			

11. Message Testing	Researcher/Research Analyst		
	Subject Matter Expert		
	Data Analyst		
	Survey Designer		
	Interviewer	Focus Group facilitator	
	Communications Specialist		
	User Experience Specialist		
	Other <i>(please add as needed)</i>		
12. Panel Research and Stakeholder Consultations	Researcher/Research Analyst	Design development, tools development, descriptive analysis	
	Researcher/Research Analyst	Inferential Analysis	
	Data Analyst		
	Panel Coordinator/Facilitator		
	Subject Matter Expert		
	Communications Specialist		
	Other <i>(please add as needed)</i>		

13. User Research and Empathy Mapping	User Researcher		
	User Experience Specialist		
	Design Thinking Specialist		
	Interviewer		
	Data Analyst		
	Subject Matter Expert		
	Other <i>(please add as needed)</i>		
14. Capacity Building	Subject Matter Expert		
	Curriculum Developer		
	Trainer/Instructor		
	Data Analyst		
	Communications Expert		
	Other <i>(please add as needed)</i>		
15. Ad-hoc MEL services	Researcher		
	MEL Specialist		
	Data Analyst		
	Subject Matter Expert		

16. Other Requested Research and Analysis Services	Data Visualization Specialist			
	Other (<i>please add as needed</i>)			
	Data Analyst			
	Data Visualization Specialist			
	Graphic Designer			
	User Experience Specialist			
	Behavioral Scientist			
	Subject Matter Expert			
	Other (<i>please add as needed</i>)			
Other				
	Field coordinator			
	Driver			
	Translator/Interpreter			
	Notetaker			
	Sign Language Interpreter			
	Other (<i>please add as needed</i>)			

Other direct costs				
	Transportation (in Yerevan) per km			
	Transportation (outside of Yerevan) per km			
	Participant transportation (per participant)			
	Lodging (in Yerevan) per person per night			
	Lodging (outside of Yerevan) per person per night			
	Venue (in Yerevan)			
	Venue (outside of Yerevan)			
	Catering (in Yerevan) per person per meal			
	Catering (outside of Yerevan) per person per meal			
	Incentive costs (per participant)			
	Other (<i>please add as needed</i>)			
	Overhead (<i>please indicate % as needed</i>)			

I.5. Indefinite Quantity Type Subcontract and Future STOs

a) This IQS RFP will result in the award of an indefinite quantity type subcontract with STOs issued thereunder priced on a firm fixed price basis to one or more offerors. These STOs will be issued as

the need arises. The award of the IQS – including quantities of supplies and services specified under it - are estimates only and are not purchased by the awarded IQS.

A Fixed Price STO is a subcontract for services, reports, or other tangible deliverables provided to and accepted by Chemonics on behalf of The Activity. As the name implies, the price of the STO is fixed, and it is not subject to any adjustment on the basis of the Subcontractor's cost experience in performing the work.

b) Delivery or performance shall be made only as authorized by STOs issued in accordance with the Ordering Procedures contained within the IQS. The Subcontractor shall furnish to Chemonics, when and if ordered, the supplies or services specified in the SOW of this subcontract up to and including the quantity designated in the IQS as the “Maximum Subcontract Ceiling,” currently estimated at \$140,000

c) Except for any limitations on quantities in the STO Limitations clause, there is no limit on the number of STOs that may be issued. Chemonics may issue STOs requiring delivery to multiple destinations or performance at multiple locations.

I.6. Source of Funding, Authorized Geographic Code

a) Any subcontract resulting from this IQS RFP will be financed by USAID funding and will be subject to U.S. Government and USAID regulations. All goods and services offered in response to this IQS RFP or supplied under any resulting award must meet USAID Geographic Code 937 in accordance with the United States Code of Federal Regulations (CFR), 22 CFR §228, available at: <https://www.ecfr.gov/cgi-bin/text-idx?SID=bc646daa32249b2fcda27d1fce1c8ed2&mc=true&node=pt22.1.228&rgn=div5>.

The cooperating country for this IQS RFP is Armenia.

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).

I.7. Chronological List of Proposal Events

The following calendar summarizes important dates in the solicitation process. Offerors must strictly follow these deadlines.

IQS RFP announcement	16/08/24
IQS RFP published	16/08/24
Deadline for written questions	22/08/24
Answers provided to questions/clarifications	24/08/24
Proposal due date	09/09/24
IQS award (estimated)	30/09/24

The dates above may be modified at the sole discretion of Chemonics. Any changes will be published in an amendment to this IQS RFP.

Written Questions and Clarifications. All questions or clarifications regarding this IQS RFP must be in writing and submitted to procurement@armeniascsa.com no later than **18:00 PM on 22 August 2024**. Questions and requests for clarification, and the responses thereto, will be circulated to all IQS RFP recipients who have indicated an interest in this IQS RFP.

Only written answers from Chemonics will be considered official and carry weight in the IQS RFP process and subsequent evaluation. Any answers received outside the official channel, whether received verbally or in writing, from employees or representatives of Chemonics International, the Activity, or any other party, will not be considered official responses regarding this IQS RFP.

Proposal Submission Date. All proposals must be received by **12:00 PM on 09 September 2024**. Late offers will be considered at the discretion of Chemonics.

Oral Presentations. Chemonics reserves the option to have select offerors participate in oral presentations with the technical evaluation committee. Interviews may consist of oral presentations of offerors' proposed activities and approaches. Offerors should be prepared to give presentations to the technical evaluation committee at the Activity office within 2 days of receiving notification.

Subcontract Award (estimated). Chemonics will select the proposal(s) that offer the best value based upon the evaluation criteria stated in this IQS RFP.

I.8. Validity Period

Offerors' proposals must remain valid for 90 calendar days after the proposal deadline.

I.9. Evaluation and Basis for Award

An award will be made to the offeror whose proposal is determined to be responsive to this solicitation document, meets the eligibility criteria stated in this IQS RFP, meets the technical, management/personnel, and corporate capability requirements, and is determined to represent the best value to Chemonics. Best value will be decided using the tradeoff process.

This IQS RFP will use the tradeoff process to determine best value. That means that each proposal will be evaluated and scored against the evaluation criteria and evaluation sub-criteria, which are stated in the table below. Cost proposals are not assigned points, but for overall evaluation purposes of this IQS RFP, technical evaluation factors other than cost, when combined, are considered significantly more important than cost factors. If technical scores are determined to be equal or nearly equal, cost will become the determining factor.

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

Evaluation Criteria	Evaluation Sub-criteria	Maximum Points
Technical Approach, Methodology, and Case Study Responses		
	Technical know-how – Does the proposal clearly explain, understand and respond to the objectives of the project as stated in the Scope of Work?	10 points

	Approach and Methodology – Does the proposed program approach and detailed activities and timeline fulfill the requirements of executing the Scope of Work effectively and efficiently?	10 points
	Sector Knowledge – Does the proposal demonstrate the offeror's knowledge related to technical sectors and illustrative services required by the SOW?	20 points
	Cast Study Responses. Are the responses realistic, achievable, and sound? Do the responses demonstrate a firm understanding of technical needs, implementation challenges, and methodological approaches? Do the responses apply information in the RFP?	20 points
Total Points – Technical Approach		60 points
<hr/>		
Management, Key Personnel, and Staffing Plan		
	Personnel Qualifications – Do the proposed Key Personnel team members have necessary experience and capabilities to carry out the SOW?	10 points
	Can the proposed consultants meet the needs of the services requested? Are their capabilities and expertise able to effectively support the services requested?	15 points
Total Points – Management		25 points
<hr/>		
Corporate Capabilities, Experience, and Past Performance		
	Company Background and Experience – Does the company have experience relevant to the project SOW?	15 points
Total Points – Corporate Capabilities		15 points
Total Points		100 points

Evaluation points will not be awarded for cost. Cost will primarily be evaluated for realism and reasonableness. If technical scores are determined to be nearly equal, cost will become the determining factor.

This IQS RFP utilizes the tradeoff process set forth in FAR 15.101-1. Chemonics will award a subcontract to the offeror whose proposal represents the best value to Chemonics and The Activity. Chemonics may award to a higher priced offeror if a determination is made that the higher technical evaluation of that offeror merits the additional cost/price.

I.10. Negotiations

Best offer proposals are requested. It is anticipated that a IQS will be awarded solely on the basis of the original offers received. However, Chemonics reserves the right to conduct discussions, negotiations and/or request clarifications prior to awarding a IQS. Furthermore, Chemonics reserves the right to conduct a competitive range and to limit the number of offerors in the competitive range to permit an efficient evaluation environment among the most highly-rated proposals. Highest-rated offerors, as determined by the technical evaluation committee, may be asked to submit their best prices or technical responses during a competitive range. At the sole discretion of Chemonics, offerors may be requested to conduct oral presentations. If deemed an opportunity, Chemonics reserves the right to make separate awards per component or to make no award at all.

I.11. Terms of IQS

This is a request for proposals only and in no way obligates Chemonics to award a subcontract. In the event of IQS negotiations, any resulting IQS will be subject to and governed by the terms and clauses detailed in Section III. Chemonics will use the template shown in section III to finalize the IQS. Terms and clauses are not subject to negotiation. By submitting a proposal, offerors certify that they understand and agree to all of the terms and clauses contained in section III.

I.12. Privity

By submitting a response to this request for proposals, offerors understand that USAID is NOT a party to this solicitation. Offerors agree that any protest to this RFP must be presented in writing with a full explanation of the offerors concerns to Chemonics for consideration. USAID will not consider protests made to USAID under USAID-funded projects. At its sole discretion, Chemonics will make a final decision on the protest at a level above the Chief of Party.

Section II Background, Scope of Work, Period and Place of Performance, Staffing, Expected Deliverables, and Deliverables Schedule

II.1. Background

The overarching purpose of this Indefinite Quantity Subcontract (IQS) is to rapidly and responsively procure research and analysis services in support of the USAID Strategic Communications Support Activity. The Activity will support the Government of Armenia (GOAM) to build effective, streamlined, data-driven, and citizen-centered strategic communications systems, capacity, and practices. Specifically, the Activity will support GOAM in the following three main focus areas: 1) enable the institutional set-up and talent management of the public sector's streamlined strategic communications; 2) ensure the public sector has institutionalized systems and capacity for data-driven information management to inform strategic communications; and 3) foster citizen-centered strategic communications and public outreach.

The three interconnected components of the Activity will aim to achieve the following expected outcomes:

- Sustainable institutional structure and protocols are in place for effective internal, interagency, and external strategic communications;
- Improved government systems and technical and human capacities for effective, data-driven, message-tested, and targeted strategic communications are established, utilizing polling, focus groups, and social sentiment analysis;
- Effective strategies are developed for two-way communications, including feedback loops based on interactive discussions to generate stronger citizen engagement.

II.2. Scope of Work

This scope of work outlines a general non-exhaustive list of services that the Subcontractor should be able to provide. The details of each service in addition to the deliverable schedule will be determined by each individual sub-task order (STO) to be issued under this IQS. The Subcontractor is expected to have in place a flexible platform that provides for close collaboration and coordination with The Activity.

Requested services may include:

1. Desk research
2. Needs assessments and gap analyses
3. Mapping (stakeholders, systems, services, user flows, user journeys, data, database etc.)
4. Benchmarking and feasibility studies
5. Audience segmentation research
6. Business process analyses
7. Surveys (online, face-to-face, telephone)
8. Polling (national, regional, targeted, public opinion, exit, push, rapid, etc.)
9. Focus group discussions
10. In-depth and key informant interviews
11. Message testing
12. Panel research and Stakeholder consultation
13. User research and empathy mapping
14. Capacity building in related areas
15. Ad-hoc MEL services
16. Other requested research and analysis services

STOs may be requested for regular or routine research and analysis services in addition to ad-hoc, as requested services.

The Subcontractor must have an Armenian field network presence. The Subcontractor's network should be able to access and communicate in Armenian with a variety of actors on the ground, including women and youth. The Subcontractor may be required to conduct research and data collection in other locations outside of Yerevan. The deliverables must be submitted in English, and when requested, in Armenian.

The Subcontractor will be required to provide a variety of data collection services, executable throughout Armenia, to support specific STOs from the Activity. The exact combination of methods and tools will be chosen based on the needs of the Activity or specific components. To triangulate findings, the Activity can request any combination of methods and tools to be used jointly. In all cases, the Subcontractor will issue an STO from the Activity before executing any research for the purposes of the Activity. The Subcontractor will be expected to discuss proposed methods and/or tools with the Activity designated staff and to subsequently refine its tools and methodology to finalize STO.

The Subcontractor, in discussion with the Activity, will be responsible for the development of the methodology/design per each requested type of the study/research as required by STO (including, but not limited to methods, sampling, tools, data analysis, and reporting). The Subcontractor alone shall be responsible for the logistics and associated costs of setting up interviews (including tablets and relevant software), focus group discussions, and other services requested through STOs.

Data collection activities under each STO will be accompanied by the completion of the following in digital form:

- Research Design document - should include research hypothesis, research type, sampling methodology, data collection methods, tools and procedures (including but not limited to tools testing, interviewers training), ethical considerations, data management and analysis strategy limitations and data quality assurance at all stages. The Research Design document must be in English and approved by the Activity for each STO prior to training or data collection commencing. As per the Activity request, the Subcontractor shall also provide the Armenian version of the Research Design document and prepare a presentation in English and/or Armenian as requested.
- Research Report- should state the principal facts for each STO research activity that is completed, including response rates, data collection locations, error and replacement rates, any challenges, limitations experienced by the research team, and any recommendations for future research requests. The analysis and data collection process are part of our learning feedback loop and final products, including research reports, and may be shared with partner organizations. As per the Activity request, the Subcontractor shall also provide the Armenian version of the Research Report and prepare a presentation in English and/or Armenian as requested.
- Interview recordings, transcripts and datasets- the Subcontractor must provide digital interview recordings/transcripts/summaries and raw and clean datasets, cross tabulations, as applicable, depending on the nature of the research task. Sensitive personal identifying information may be redacted. As per the Activity request, the Subcontractor shall also provide the English version of the transcripts/summaries, as well as prepare a presentation in English and/or Armenian as requested.
- When applicable, the Subcontractor will also need to provide the commands used (e.g., "do files"/syntax) to analyze data.

Required services

Any of the following research and data collection services may be requested. They could be used as a standalone method or jointly with other methods. NO WORK MAY COMMENCE or be invoiced without

the issuance of a STO from The Activity. When research and/or data collection are completed by the Subcontractor in response to the Activity research request, the raw data, a clean data set and the Research Report must be provided to the Activity in appropriate digital form.

- 1) *Desk research* - the Subcontractor will be required to conduct thorough desk research to gather and analyze existing information relevant to a specific subject area. Desk research involves reviewing and synthesizing data from secondary sources such as academic journals, industry reports, government publications, government internal documents (subject to availability), project/program documentation, online databases, and other relevant documents. This method is essential for understanding the current landscape, identifying trends, and providing a comprehensive background for further research. The Subcontractor will begin by defining the research objectives in collaboration with the Activity, ensuring that the scope and focus of the desk research align with the Activity goals. The Subcontractor will then systematically collect and evaluate data from credible, reliable, and relevant sources. The analysis will involve identifying key themes, patterns, and insights that address the research objectives. The final deliverable will include a detailed desk research report that outlines the methodology, summarizes the key findings, and provides strategic insights and recommendations based on the reviewed materials/literature. The Subcontractor will also provide a bibliography of all sources consulted and a presentation of the main findings.

Illustrative staffing considerations: Researcher, subject matter expert

- 2) *Needs assessments and gap analyses*- the Subcontractor will be required to conduct comprehensive needs assessments to identify and evaluate the demands and needs among specific stakeholders, institutions, or target groups. Needs assessments involve collecting and analyzing data to determine what is necessary to achieve the desired outcomes or improve current conditions. This process typically includes a combination of qualitative and quantitative methods such as surveys, interviews, focus groups, and observational studies to gather a holistic understanding of the needs. The Subcontractor will begin by defining the objectives of the needs assessment and developing the design in collaboration with the Activity, ensuring that the methodology is context-appropriate and tailored to the specific environment. The data collected will be analyzed to identify key needs and gaps, providing actionable insights and recommendations. The final deliverable will include a detailed needs assessment report that outlines the methodology, key findings, and strategic recommendations for addressing the identified needs. The Subcontractor will also provide a clean database (raw data) and a presentation of the main findings, including visualizations such as charts and graphs to illustrate the results. The Subcontractor will also be required to perform gap analyses to identify the differences between current performance and desired outcomes. This process starts with defining the benchmarks or standards that represent the desired state. Data is then collected and compared against these benchmarks to pinpoint performance gaps. The analysis involves examining various factors such as processes, resources, and capabilities to determine why the gaps exist. Finally, recommendations are developed to address these gaps, including strategies for bridging them and improving overall performance.

Illustrative staffing considerations: Researcher/research analyst (design development, tools development, descriptive analysis), researcher/research analyst (inferential analysis), data analyst, interviewer, subject matter expert, business process analyst, financial analyst

- 3) *Mapping (stakeholders, systems, services, user flows, user journeys, data, database etc.)*- the Subcontractor will be required to conduct comprehensive mapping that involve systematically documenting and visualizing the relationships and processes within a specific domain, such as stakeholders, systems, services, user flows, user journeys, data and databases. This process begins

with identifying the key components and interactions within the area of interest, followed by gathering data through various methods, including interviews, observations, systems and document reviews. The collected data is then organized into detailed maps that illustrate the structure and dynamics of the domain. Database and data mapping will ensure accurate and efficient data and information management. This involves documenting and visualizing the relationships between different data elements and systems. The Subcontractor will use various techniques to map data flows and identify areas for improvement. These mapping exercises will help improve data quality, enhance data integration, and support data-driven decision-making. Tools like Lucidchart, Miro and others can be useful for creating process maps, user flows, and system diagrams.

Illustrative staffing considerations: Researcher/research analyst, subject matter expert, data analyst, system analyst, user experience specialist, database specialist

- 4) *Benchmarking and feasibility studies*- the Subcontractor may be required to conduct comprehensive benchmarking and feasibility studies to evaluate the viability and potential performance of specific initiatives or projects. Benchmarking involves comparing an organization's processes, performance metrics, and practices against industry standards or best practices to identify areas for improvement. Feasibility studies assess the practicality and potential success of proposed projects by analyzing various factors such as technical, economic, legal, operational, and scheduling aspects. The Subcontractor will start by defining the objectives and scope of the benchmarking and feasibility studies in collaboration with the Activity. This includes identifying relevant benchmarks and key performance indicators (KPIs) for comparison. The Subcontractor will collect data from internal sources and external benchmarks, including industry reports, competitor analyses, and best practices. For the feasibility study, data will be gathered through methods such as market analysis, cost-benefit analysis, risk assessment, and stakeholder interviews. The final deliverable for the benchmarking study will include a detailed report that outlines the benchmarking methodology, presents comparative analyses, and highlights areas for improvement. The feasibility study report will provide an in-depth evaluation of the project's potential, including recommendations for implementation or necessary adjustments. The Subcontractor will also provide a clean database (raw data) and a presentation of the main findings.

Illustrative staffing considerations: Researcher/research analyst, subject matter expert, business analyst, financial analyst, cost-benefit analysis expert

- 5) *Audience segmentation research* - the Subcontractor will be required to conduct comprehensive audience segmentation research to enhance the effectiveness of government communications by understanding the diverse preferences and information behavior of different societal groups. This activity will build on and complement the previous efforts in the field and gather information about various groups within society, focusing on their political, ethnic, and cultural preferences. The research will indicatively delve into key aspects such as:
 - Demographics (e.g., age, gender, income, location, etc.): Understanding multiple demographic factors and determining how they impact on the information behavior of target audiences.
 - Psychographic variables (e.g., lifestyle, values, interests): Understanding psychographic factors and determining their impact on the information behavior of target audiences.
 - Behavioral variables and media consumption: Identifying their behavioral and media consumption habits, patterns, and overall information behavior.
 - Perception analysis: Assessing how they perceive government communications.
 - Political views: Looking into the correlation between the political views people hold and their information behavior.

Upon detecting the segmentation criteria, the Subcontractor, in collaboration with the Activity, should decide on the most appropriate research design (e.g., cluster analysis, factor analysis). The Subcontractor is expected to analyze and interpret the results, identifying key segments and providing insights into their characteristics and needs. The final deliverable will include a detailed segmentation report that outlines the methodology, identifies and describes each segment, and offers strategic recommendations for targeting these segments. In addition to the detailed analysis and segmentation, the report should provide clear and actionable recommendations on communicating with all the identified audiences. These recommendations will encompass communications parameters, including but not limited to messages, channels, tools, types, and formats of content for each audience. The Subcontractor will also provide a clean database (raw data) and a presentation of the main findings, including visualizations such as charts and graphs to illustrate the segmentation.

Illustrative staffing considerations: Researcher/research analyst (design development, tools development, descriptive analysis), researcher/research analyst (inferential analysis), subject matter expert, communications/marketing specialist, statistician, survey designer, interviewer/focus group facilitator, behavioral scientist

- 6) ***Business process analyses***- the Subcontractor may be required to conduct business process analyses to evaluate and improve organizational processes. This involves mapping out existing processes (“as is”), identifying inefficiencies, and recommending improvements (“to be”). The Subcontractor will collect data through various methods, such as interviews, observations, and systems and document reviews, to create detailed process maps. These analyses will help organizations streamline operations, reduce costs, and improve overall efficiency and effectiveness. Techniques such as Six Sigma, Lean, and SWOT analysis are employed to identify inefficiencies, eliminate waste, and assess strengths, weaknesses, opportunities, and threats within processes. By utilizing these tools and techniques, the Subcontractor can gain a clear understanding of the stakeholders’ current processes, identify areas for improvement, and recommend changes to optimize performance and achieve their goals.

Illustrative staffing considerations: Researcher/research analyst, business process analyst, change management specialist

- 7) ***Surveys (online, face-to-face, telephone, etc.)***- the Subcontractor will be required to implement surveys based on samples (where possible representative samples) of the Armenian population, in designated locations. The Subcontractor must have the capacity and previous experience in designing context-appropriate methodologies that ensure statistically significant findings when this is required. The survey may include open-ended and closed-ended survey questions. Based on the research questions, the Subcontractor in collaboration with the Activity should be able to select from various types of research designs (e.g. cross-sectional, quasi experimental, correlational). The Subcontractor will be required to provide a Research Design document, final Research Report, clean database (raw data), frequencies and cross tabulations on all questions (inferential statistics, if required per STO), a presentation showcasing the main findings, and any other documents mentioned in the specific STO. The Subcontractor should ensure that each individual interviewer will not conduct more than 7% of the total interviews for nationwide surveys.

Illustrative surveys include:

- ***Online surveys***- an online survey is a questionnaire that the target audience can complete over the Internet. Upload or post online surveys on specified internet portal(s), website(s), and/or social media on a random or specified sample that would be identified in collaboration with the Activity. The survey may include open-ended and closed-ended survey questions. Online surveys can be

conducted using a client's platform on the web pages of different media partners or using CAWI system for conducting online interviews by sending e-mails to potential respondents.

- *Telephone surveys*- prepare questionnaires and carry out telephone survey/CATI with a random or specified sample (location, age group, education, etc.) that would be identified in collaboration with the Activity.
- *Face-to-face surveys*- prepare questionnaires and conduct in-person interviews in collaboration with the Activity. CAPI data collection method could be used for this purpose in which the interviewer uses a tablet, mobile phone or a computer to record answers given during the interview. The Subcontractor will design the survey and administer it through face-to-face interviews. For each survey, the Subcontractor shall agree on a research design with the Activity and provide the Activity with both a raw and clean dataset in a format agreed with the Activity, along with the final research report. The Activity's preference is to use electronic survey software to avoid the use of paper-based surveys given efficiency, quality control, and security considerations.

Illustrative staffing considerations: Researcher/research analyst (design development, tools development, descriptive analysis), researcher/research analyst (inferential analysis), data analyst, interviewer, online survey administrator, data entry specialist (if the software is not used)

- 8) *Polling (national, regional, targeted, public opinion, exit, push, rapid, etc.)*- the Subcontractor may be required to design and execute a comprehensive range of polling activities (through well designed one-two questions), including national, regional, targeted, public opinion, exit, push, and rapid polling, etc. These polls aim to gather timely and relevant data on public opinions, behaviors, and preferences across diverse populations and regions, providing critical insights to the Activity. They will help to reveal the way of knowing people's choices and understanding what works for them. Initially, the Subcontractor will collaborate with the Activity to define the specific objectives and scope for each type of poll, ensuring that the methodology is tailored to the research goals and the target demographic. For national and regional polls, the Subcontractor will employ representative sampling techniques to ensure the collected data accurately reflects the broader population. Targeted polls will focus on specific subgroups, such as certain age groups, professions, or geographic areas, to gain deeper insights into their unique perspectives. Exit polls will be conducted immediately after events or voting to gauge immediate reactions and behaviors. Push polls, designed to influence as well as measure opinions, will be carefully crafted to ensure ethical standards while collecting data on the impact of specific messages. Rapid polls will be implemented to quickly assess public sentiment in response to recent events or emerging issues. These polls will use streamlined methodologies to deliver fast results without compromising data quality. The final deliverables will include detailed reports that analyze and interpret the polling data, highlighting key trends, correlations, and significant findings. Additionally, the Subcontractor will provide a clean dataset of the raw data, frequency tables, cross-tabulations, and a methodological report detailing the technical aspects of each polling activity.

Illustrative staffing considerations: Researcher/research analyst (design development, tools development, descriptive analysis), researcher/research analyst (inferential analysis), data analyst, interviewer, online poll administrator, data entry specialist (if the software is not used)

- 9) *Focus group discussions (FGDs)*- the Subcontractor will be required to implement data collection through focus group discussions (online or face-to-face). The Subcontractor will be expected to provide all relevant equipment, refreshments, stationery and materials required for the effective completion of the focus group discussion, including sourcing appropriate and safe venues for

discussions to take place. The Activity may request the Subcontractor to present physical or audio-visual content to a focus group and then to engage in discussion based on the materials presented. Limited participation costs/incentives may be payable to participants and these costs should be outlined by the Subcontractor in the response. For focus group studies, the Subcontractor shall provide audio/video recordings (if applicable) and full transcripts from all discussions in original language and if requested by the Activity, translated into English, along with the Research Report. If audio recording is undertaken in preference to detailed note taking, complete and informed consent must be obtained from the entire group. To convene focus group discussions, the Subcontractor will work in close collaboration with the Activity and relevant the Activity partner(s) (if applicable) to develop the Research Design document, including but not limited to sampling and FGD guide carry out focus group discussions in the specified number of locations as per the Design document;

- a) Carry out data analysis (consider using software, e.g. NVivo if relevant). Provide reports in English and, when requested by the Activity, in Armenian;
- b) Provide a final report which will analyze and identify patterns. The final report will include a narrative written executive summary including select visual aids, such as graphs or charts. The body of the narrative report will include concise quotes from participants that summarize research findings;
- c) For each focus group, the Subcontractor shall provide audio/video recordings (if applicable) and full transcripts from all interviews in original language and if requested by the Activity, translated into English.
- d) Sections of the report will be clearly marked distinguishing the analysis provided by the partner and the statements made by focus group participants. The draft and final reports can be organized according to the following illustrative sections: Table of Contents, List of Abbreviations, Executive Summary, Methodology/Design, Focus Group Findings, Patterns and Outliers, Conclusions, Recommendations (if applicable), and Annexes.

Illustrative staffing considerations: Researcher/research analyst, focus group facilitator, data analyst, subject matter expert, recruiter

10) *In-depth and key informant interviews-* the Subcontractor will be required to implement data collection through individual interviews based upon specific STOs, following an approved methodology, in specified locations. To conduct in-depth interviews, the Subcontractor will:

- a) Work in close collaboration with the Activity to develop a Design document, including but not limited to sampling and In-depth interview guide;
- b) Carry out in-depth interviews with the specified number of people in the specified number of locations and organizations/institutions as per the Design document;
- c) Carry out data analysis (consider using software, e.g. NVivo if relevant). Provide reports in English and, when requested by the Activity, in Armenian;
- d) Provide the Activity with regular analysis of data collected in a time effective manner – this reporting will be delivered via email or in person to the Activity, as well as, a written transcript to be delivered no later than three (3) days after the interview completion;
- e) Provide a final report which will analyze collected data and will identify patterns. The final report will include a narrative written executive summary including select visual aids. The body of the narrative report will include concise quotes from interviewees that summarize research findings. Sections of the report will be clearly marked distinguishing the analysis provided by the Subcontractor and the statements made by interviewees. The draft final reports can be organized according to the following illustrative sections: Table of Contents, List of Abbreviations, Executive Summary, Methodology/Design, Key Findings, Patterns and Outliers, Conclusions, Recommendations (if applicable), and Annexes.

f) For each individual interview task, the Subcontractor shall provide audio/video recordings (if applicable) and full transcripts from all interviews in original language and the Research Report. If requested by the Activity, the Subcontractor must also provide a translated English version of the full transcripts.

Research with youth (aged 13-25) or specific segments of the community may be requested. Depending on the needs, in-depth interviews may also be conducted with different stakeholders (for example: GOAM staff, CSO representatives, citizens, etc.) which makes the analysis more complex and time consuming. Details regarding required demographics of interviewees will be detailed in individual STOs.

The Subcontractor will also be required to conduct key informant interviews as a targeted qualitative research method to gather in-depth insights from individuals with specialized knowledge or experiences relevant to the study's subject matter. This approach is crucial for obtaining detailed, expert-level understanding that cannot be captured through broader survey methods. During the planning phase, the Subcontractor, in collaboration with the Activity, will identify and select key informants based on their expertise, experience, and relevance to the research objectives. These informants may include community experts, government officials, CSO and media representatives or other individuals who hold critical information about the topic of interest. The deliverables from the key informant interviews will include a comprehensive analysis report that synthesizes the insights gathered from all interviews. This report will detail the methodologies used, summarize the key findings, and provide actionable recommendations based on the expert inputs. Additionally, the Subcontractor will supply transcripts or detailed summaries of each interview, ensuring that the nuances and depth of the discussions are accurately captured.

Illustrative staffing considerations: Researcher/research analyst, data analyst, interviewer, subject matter expert, recruiter

11) *Message testing*- the Subcontractor will be required to conduct comprehensive message testing to evaluate and refine communications directed at specific stakeholders, institutions, or target groups. Message testing involves collecting and analyzing data to determine the effectiveness of various communication strategies and messages in achieving the desired impact or improving current perceptions. The Subcontractor will define the objectives of the message testing, develop the design and implement message testing in collaboration with the Activity, ensuring that the methodology is context-appropriate and tailored to the specific environment. Data collected will be analyzed to identify key insights and gaps in current messaging, providing actionable recommendations for enhancing communication strategies. The final deliverable will include a detailed message testing report that outlines the methodology, key findings, and strategic recommendations for optimizing messages. The Subcontractor will also provide a clean database (raw data) and a presentation of the main findings, including visualizations such as charts and graphs to illustrate the results.

Illustrative staffing considerations: Researcher/research analyst, subject matter expert, data analyst, survey designer, interviewer/focus group facilitator, communications specialist, user experience specialist

12) *Panel research and Stakeholder Consultations* - the Subcontractor may be required to implement panel research studies. Panel studies are a particular design of longitudinal study in which the unit of analysis is followed at specified intervals over a period. Market research panels are comprised of pre-recruited groups of people who have agreed to participate, so although the selection method to approach these people may be random, the group is not random in that they are all chosen from the group of people who want to do this task. Panels can be chosen from a target audience segment, current customers, potential customers, or any other particular group the commissioner of the study

wants to include. The consumer panel group usually is a good cross-section of the population. They may be asked to keep a diary, answer questions, or attend a focus group meeting. The Subcontractor may also be required to facilitate comprehensive stakeholder consultations to engage a diverse range of participants, gathering their inputs, perspectives, and feedback on specific projects, policies, or initiatives. The Subcontractor will collaborate with the Activity to identify and map key stakeholders, which may include industry experts, government officials, civil society organizations, and other relevant entities or individuals affected by or interested in the subject matter. The goal is to create a diverse and representative group that can provide a wide range of insights and perspectives. During consultations, the Subcontractor will use a variety of facilitation tools and techniques to guide the discussions, encourage engagement, and capture detailed feedback. This may include the use of discussion guides, questionnaires, or digital platforms for collecting responses. Following the consultations, the Subcontractor will analyze the feedback to identify key themes, concerns, and suggestions. The results will be compiled into a comprehensive report that summarizes the stakeholder inputs, provides insights into the consensus and divergent views, and offers recommendations based on the stakeholders' feedback. The deliverables will also include detailed documentation of the consultation process, lists of participants, agenda, photos (if relevant), and summaries of each session/minutes.

Illustrative staffing considerations: Researcher/research analyst (design development, tools development, descriptive analysis), researcher/research analyst (inferential analysis), data analyst, panel coordinator/facilitator, subject matter expert, communications specialist.

- 13) ***User research and empathy mapping***- the Subcontractor may be required to perform user research and empathy mapping to understand the needs, behaviors, thought process and experiences of users. User research involves collecting quantitative and qualitative data through interviews, observations, and surveys to gain insights into user needs and preferences. Empathy mapping is a tool used to visualize user experiences and identify pain points. Techniques such as interviews, focus groups, and contextual inquiries allow for rich qualitative insights by engaging directly with users in their environments. Empathy mapping tools like Miro, Smaply, Empathy Map Canvas assist in visualizing user emotions, thoughts, and pain points, providing a holistic view of the user experience. These tools and techniques collectively help create a detailed understanding of users, leading to more user-centered designs and solutions.

Illustrative staffing considerations: User researcher, user experience specialist, design thinking specialist, interviewer, data analyst, subject matter expert

- 14) ***Capacity building***- the Subcontractor may be required to design and implement comprehensive capacity-building programs aimed at enhancing the skills, knowledge, and effectiveness of individuals and institutions within the target group specified by the Activity. This program will focus on developing core competencies that are critical for the participants to perform their roles effectively. In collaboration with the Activity, the Subcontractor will assess the current capabilities and identify specific training needs of the target audience. This assessment will help tailor the capacity-building initiatives to address the gaps and leverage the strengths of the participants. The program may cover research, analytics and MEL-related topics, relevant to the participants' needs. The training methods employed will be diverse, incorporating workshops, seminars, webinars, simulations and hands-on training sessions to accommodate different learning styles and to maximize engagement and retention. The Subcontractor will ensure that all training materials and sessions are accessible and inclusive, catering to a broad range of

participants with varying levels of expertise and experience. Throughout the capacity-building interventions, the Subcontractor will monitor progress and gather feedback from participants to evaluate the effectiveness of the training and make necessary adjustments. Upon completion of the program, the Subcontractor will provide a comprehensive report detailing the training conducted, participant engagement, outcomes achieved (both quantitative and qualitative), and recommendations for future capacity-building efforts. Deliverables will include training materials, signing sheets, a database of participant progress, and certification for participants who successfully complete the program.

Illustrative staffing considerations: Subject matter expert, curriculum developer, trainer/instructor, data analyst, communications expert

15) Ad-hoc MEL services- the Subcontractor may be required to provide ad-hoc MEL services designed to support GOAM efforts and priorities, including but not limited to the design and introduction of MEL-related systems, processes, and practices. These services are tailored to meet specific needs that arise unexpectedly or require immediate attention, allowing for flexibility and rapid response in a dynamic operational environment. The process begins with a thorough understanding of the specific MEL requirements through benchmarking and feasibility studies, needs assessments and gap analyses, surveys, interviews, site visits, and focus group discussions to gather quantitative and qualitative data. The Subcontractor will utilize a variety of tools and technologies to ensure efficient data collection. Once data is collected, the Subcontractor will perform detailed analyses to evaluate the performance against the established indicators. Learning components will be integrated throughout the process to ensure that insights and lessons learned are captured and disseminated to inform future planning and decision-making. The illustrative deliverables for the ad-hoc MEL services may include a final report on tailored MEL-related systems, processes, and practices detailing the results of needs assessments and gap analyses, designed and introduced services, recommendations, as well as deployed and tested systems and processes.

Illustrative staffing considerations: Researcher, MEL specialist, data analyst, subject matter expert, data visualization specialist

16) *Other requested research and analysis services*- the Subcontractor will be required to provide other requested research and analysis services as needed. This involves designing and implementing customized research and evaluation activities to meet the Activity's specific needs. The Subcontractor will use a combination of qualitative and quantitative methods to gather data, analyze findings, and provide actionable recommendations. Other requested research and analysis services will be covered under an amalgamation of other services outlined above (for scope and costing purposes for this RFP).

Data visualization and presentation

The Subcontractor is expected to excel in producing innovative visualizations and graphics that transform complex data and results into concise, compelling, and easily digestible insights. Utilizing a range of advanced data visualization tools, including infographics, map-based visualizations, and interactive visuals, the Subcontractor will expertly identify and employ the most appropriate techniques for each data set. Collaboration with the Activity will be key in pinpointing the crucial elements of the narrative that the Activity and partners wish to convey, ensuring that the chosen data and visuals effectively tell that story.

The Subcontractor must be adept at translating technical information into clear and accessible formats suitable for a diverse audience, including the general public, media, government officials, CSOs, and international organizations. By breaking down complex data into manageable pieces, the Subcontractor will use innovative storytelling approaches to visually summarize large concepts and present compelling insights. This approach will ensure that the information is not only informative but also engaging and understandable for all stakeholders involved.

Illustrative staffing considerations: Data analyst, data visualization specialist, graphic designer, user experience specialist, subject matter expert

II.3. Period and Place of Performance

The anticipated period of performance for the IQS is effective from the date of subcontract award through 31 March 2029. The primary place of performance will be Armenia.

II.4. Staffing

The offeror shall propose Key Personnel to support the IQS and an array of technical experts to serve under STOs. The technical expert(s) should have expertise in relevant technical areas.

II.5. Expected Deliverables

This is an indefinite quantity type subcontract with STOs issued hereunder priced on a firm fixed price basis. The deliverables will be determined on a task order basis.

II.6. Deliverables Schedule

The deliverables schedule will be determined on a STO basis.

Section III Indefinite Quantity Subcontract (Terms and Clauses)

In the event of a subcontract award resulting from an offer submitted in response to this RFP, the terms and conditions of the attached Project Office Sub-contract template will apply. Chemonics, at its own discretion, reserves the right to modify these terms. Final Terms and Clauses included in eventual agreement will be included in eventual IQS and STO agreements.

Annex 1 Cover Letter

[Offeror: Insert date]

[Insert name of point of contact for IQS RFP]

[Insert designation of point of contact for IQS RFP]

[Insert project name]

[Insert "Chemonics International Inc." or if there is a locally registered entity, use that name]

[Insert project office address]

Reference: Request for Proposals [Insert IQS RFP name and number]

Subject: [Offeror: Insert name of your organization]'s technical and cost proposals

Dear Mr./Mrs. [Insert name of point of contact for IQS RFP]:

[Offeror: Insert name of your organization] 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

Taxpayer Identification Number

UEI Number

Address

Address

Telephone

Fax

E-mail

As required by section I, I.7, we confirm that our proposal, including the cost proposal will remain valid for [insert number of days, usually 60 or 90] calendar days after the proposal deadline.

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

[Offerors: 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]

- I. Copy of registration or incorporation in the public registry, or equivalent document from the government office where the offeror is registered.
- II. Copy of company tax registration, or equivalent document.
- III. Copy of trade license, or equivalent document.
- IV. Evidence of Responsibility Statement.

Sincerely yours,

Signature

[Offeror: Insert name of your organization's representative]

[Offeror: Insert name of your organization]

Annex 2 Guide to Creating a Financial Proposal for an IQS

The purpose of this annex is to guide offerors in creating a budget for their cost proposal. Because the subcontract 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.

Step 1: Create a budget for the cost proposal. Each offeror must create a budget using a spreadsheet program compatible with MS Excel. The budget period should follow the technical proposal period. A budget template is attached to the IQS RFP.

Step 2: Write Budget 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.

Budget Template

Offerors should revise the budget line items accordingly in response to the technical and cost requirements of this IQS RFP. VAT SHOULD NOT BE INCLUDED IN THE COST PROPOSAL.

Annex 3 Required Certifications

The Federal Acquisition Regulation mandates certain certifications that offerors are required to sign as part of a solicitation or request for proposal (RFP) funded with federal funds.

- Evidence of Responsibility Statement
- Prohibition on Assistance to Drug Trafficking Participant Certification
- Subcontractor Size Self-Certification
- Federal Funding accountability and Transparency Act (FFATA) subaward Reporting Questionnaire and Certification

EVIDENCE OF RESPONSIBILITY

1. Offeror Business Information

Company Name: Full Legal Name

Address: Address

UEI Number: Enter the Unique Entity Identifier (UEI number) assigned to the company / (Instructions to Offerors: Offerors will provide their registered UEI number for subawards valued at USD\$30,000 and above with Chemonics unless exempted. Exemption may be granted by Chemonics or based on a negative response to Section 3(a) below (ie, the offeror, in the previous tax year, had gross income from all sources under USD\$300,000). Sam.gov regulates the system and registration may be obtained online. If Offeror does not have a UEI number and is unable to obtain one before proposal submission deadline, Offeror shall include a statement in their Evidence of Responsibility Statement noting their intention to register for a UEI number should it be selected as the successful offeror or explaining why registration for a UEI number is not applicable or not possible. Additional guidance on obtaining a UEI number is available upon request.)

2. Authorized Negotiators

Company Name proposal for Proposal Name may be discussed with any of the following individuals. These individuals are authorized to represent Company Name in negotiation of this offer in response to RFP No.

List Names of Authorized signatories

These individuals can be reached at Company Name office:

Address
Telephone/Fax
Email address

3. Adequate Financial Resources

Company Name has adequate financial resources to manage this contract, as established by **our audited financial statements (OR list what else may have been submitted)** submitted as part of our response to this proposal.

If the offeror is selected for an award valued at \$30,000 or above, and is not exempted based on a negative response to Section 3(a) below, any first-tier subaward to the organization may be reported and made public through FSRS.gov in accordance with The Transparency Acts of 2006 and 2008. Therefore, in accordance with FAR 52.240-10 and 2CFR Part170, if the offeror positively certifies below in Sections 3.a and 3.b and negatively certifies in Sections 3.c and 3.d, the offeror will be required to disclose to Chemonics for reporting in accordance with the regulations, the names and total compensation of the organization's five most highly compensated executives. By submitting this proposal, the offeror agrees to comply with this requirement as applicable if selected for a subaward.

In accordance with those Acts and to determine applicable reporting requirements, **Company Name** certifies as follows:

- a) In the previous tax year, was your company's gross income from all sources above \$300,000?
 Yes No
- b) In your business or organization's preceding completed fiscal year, did your business or organization (the legal entity to which the DUNS/UEI number belongs) receive (1) 80 percent or more of its annual gross revenues in U.S. federal contracts, subcontracts, loans, grants, subgrants, and/or cooperative agreements; **and** (2) \$25,000,000 or more in annual gross revenues from U.S. federal contracts, subcontracts, loans, grants, subgrants, and/or cooperative agreements?:
 Yes No
- c) Does the public have access to information about the compensation of the executives in your business or organization (the legal entity to which the DUNS/UEI number it provided belongs) through periodic reports filed under section 13(a) or 15(d) of the Securities Exchange Act of 1934 (15 U.S.C. 78m(a), 78o(d)) or section 6104 of the Internal Revenue Code of 1986? (FFATA § 2(b)(1)):
 Yes No
- d) Does your business or organization maintain an active registration in the System for Award Management (www.SAM.gov)?
 Yes No

4. Ability to Comply

Company Name is able to comply with the proposed delivery of performance schedule having taken into consideration all existing business commitments, commercial as well as governmental.

5. Record of Performance, Integrity, and Business Ethics

Company Name record of integrity is (Instructions: Offeror should describe their record. Text could include example such as the following to describe their record: "outstanding, as shown in the Representations and Certifications. We have no allegations of lack of integrity or of questionable business ethics. Our integrity can be confirmed by our references in our Past Performance References, contained in the Technical Proposal."

6. Organization, Experience, Accounting and Operational Controls, and Technical Skills

(Instructions: Offeror should explain their organizational system for managing the subcontract, as well as the type of accounting and control procedure they have to accommodate the type of subcontract being considered.)

7. Equipment and Facilities

(Instructions: Offeror should state if they have necessary facilities and equipment to carry out the contract with specific details as appropriate per the subcontract SOW.)

8. Eligibility to Receive Award

(Instructions: Offeror should state if they are qualified and eligible to receive an award under applicable laws and regulation and affirm that they are not included in any list maintained by the US Government of entities debarred, suspended or excluded for US Government awards and funding. The Offeror should state whether they have performed work of similar nature under similar mechanisms for USAID.)

9. Commodity Procurement

(Instructions: If the Offeror does not have the capacity for commodity procurements - delete this section. If the Offeror does have the capacity, the Offeror should state their qualifications necessary to support the proposed subcontract requirements.)

10. Cognizant Auditor

(Instructions: Offeror should provide Name, address, phone of their auditors – whether it is a government audit agency, such as DCAA, or an independent CPA.)

11. Acceptability of Contract Terms

(Instructions: Offeror should state its acceptance of the proposed contract terms.)

12. Recovery of Vacation, Holiday and Sick Pay

(Instructions: Offeror should explain whether it recovers vacation, holiday, and sick leave through a corporate indirect rate (e.g. Overhead or Fringe rate) or through a direct cost. If the Offeror recovers vacation, holiday, and sick leave through a corporate indirect rate, it should state in this section the number of working days in a calendar year it normally bills to contracts to account for the vacation, holiday, and sick leave days that will not be billed directly to the contract since this cost is being recovered through the corporate indirect rate.)

13. Organization of Firm

(Instructions: Offeror should explain how their firm is organized on a corporate level and on practical implementation level, for example regionally or by technical practice.)

Signature: _____

Name: _____

One of the authorized negotiators listed in Section 2 above should sign

Title: _____

Date: _____

KEY INDIVIDUAL CERTIFICATION NARCOTICS OFFENSES AND DRUG TRAFFICKING

I hereby certify that within the last ten years:

1. I have not been convicted of a violation of, or a conspiracy to violate, any law or regulation of the United States or any country concerning narcotic or psychotropic drugs or other controlled substances.
2. I am not and have not been an illicit trafficker in any such drug or controlled substance.
3. I am not and have not been a knowing assistor, abettor, conspirator, or colluder with others in the illicit trafficking in any such drug or substance.

Signature: _____ Date: _____

Name:

Title/Position:

Organization:

Address:

Date of Birth:

NOTICE:

1. You are required to sign this Certification under the provisions of 22 CFR Part 140, Prohibition on Assistance to Drug Traffickers. These regulations were issued by the Department of State and require that certain key individuals of organizations must sign this Certification.
2. If you make a false Certification you are subject to U.S. criminal prosecution under 18 U.S.C. 1001.

Subcontractor Size Self-Certification Form

Reference Number: [enter the funding agency's solicitation or contract number]

Project Name: [enter full name of project]

Primary NAICS Code: [enter the NAICS code that best describes the work being performed under the subcontract. i.e.: for technical assistance provision use 541990 or management consulting use 541611. For HHE use 484210 and for GIS use 541360. The NAICS codes most commonly used by Chemonics is 541611, 541618, 541620, 541990]

Company Name: Full legal name

Address: Street address

City, State, Zip: City, State Zip

UEI Number: [enter the Unique Entity Identifier (UEI number) here. Subcontractors must have a UEI number, unless exempted, as a part of receiving a subcontract with Chemonics.]

Contact Person: Name, Title

Contact Phone Number: (555) 555-5555

Type of Entity

If you have difficulty ascertaining the business size status, please refer to SBA's website (www.sba.gov/size) or contact your local SBA office.

Small Business Large Business Nonprofit/Educational Government Non-US

If "Small Business" is checked above, and if applicable, please identify any additional small business designations under which the company qualifies. You may wish to review the definitions for the below categories in the Federal Acquisition Regulation 19.7 or 52.219-8 (www.acquisition.gov/far/) to determine applicability.

Small Disadvantaged Business 8(a)
 HUBZone Woman Owned Small Business
 Veteran Owned Service Disabled Veteran Owned
 Alaskan Native Corporation Indian Tribe

By signature below, I hereby certify that the business type and designation indicated above is true and accurate as of the date of execution of this document, and I further understand that under 15 U.S.C. 645(d), any person who misrepresents a business' size status shall (1) be punished by a fine, imprisonment, or both; (2) be subject to administrative remedies; and (3) be ineligible for participation in programs conducted under the authority of the Small Business Act.

Signature and Title (required)

Date

*****CHEMONICS INTERNAL USE ONLY*****
HUBZone Status has been verified in the System for Award Management database or Dynamic Small Business Database Search as of ____/____/____ conducted by: _____.

FEDERAL FUNDING ACCOUNTABILITY AND TRANSPARENCY ACT (FFATA) SUBAWARD REPORTING QUESTIONNAIRE AND CERTIFICATION

Prime Contract

Insert Prime Contract Name

Insert Prime Contract Number/Task Order Number

Subcontractor Data

Insert Subcontractor Name

Insert Subcontractor AddressLine1

Insert Subcontractor AddressLine2

Insert Subcontractor City, Insert Subcontractor State in USA, or Province/Other

Insert Subcontractor Zipcode or PostalCode Insert Subcontractor Country

Subcontract Number: INSERT SUBCONTRACT NUMBER

Start Date: INSERT SUBCONTRACT START DATE

Subcontract Value: INSERT SUBCONTRACT VALUE

A. In the previous tax year, was your company's gross income from all sources **under \$300,000?**

Yes No

B. If "No", please provide the below information and answer the remaining questions.

(i) **Subcontractor DUNS/UEI Number: Insert DUNS/UEI on record**

(ii) In your business or organization's preceding completed fiscal year, did your business or organization (the legal entity to which the DUNS/UEI number belongs) receive (1) 80 percent or more of its annual gross revenues in U.S. federal contracts, subcontracts, loans, grants, subgrants, and/or cooperative agreements; and (2) \$25,000,000 or more in annual gross revenues from U.S. federal contracts, subcontracts, loans, grants, subgrants, and/or cooperative agreements?:

Yes No

(iii) Does the public have access to information about the compensation of the executives in your business or organization (the legal entity to which the DUNS/UEI number it provided belongs) through periodic reports filed under section 13(a) or 15(d) of the Securities Exchange Act of 1934 (15 U.S.C. 78m(a), 78o(d)) or section 6104 of the Internal Revenue Code of 1986?:

Yes No

(iv) Does your business or organization maintain a record in the System for Award Management (www.SAM.gov)?

Yes No

(v) If you have indicated "Yes" for paragraph (ii) **and** "No" for paragraph (iii) and (iv) above, provide the names and total compensation* of your five most highly compensated executives** for the preceding completed fiscal year.

1. Name: _____
Amount: _____
2. Name: _____
Amount: _____
3. Name: _____
Amount: _____
4. Name: _____
Amount: _____
5. Name: _____
Amount: _____

By signature below, I hereby certify that the information provided above is true and accurate as of the date of execution of this document, and I further understand that annual certification is required for information provided in paragraph (v) above.

Signature and Title (required)

Date

**“Total compensation” means the cash and noncash dollar value earned by the executive during the Subcontractor’s preceding fiscal year and includes the following (for more information see 17 CFR 229.402(c)(2)):

- (1) *Salary and bonus.*
- (2) *Awards of stock, stock options, and stock appreciation rights.* Use the dollar amount recognized for financial statement reporting purposes with respect to the fiscal year in accordance with the Financial Accounting Standards Board’s Accounting Standards Codification (FASB ASC) 718, Compensation-Stock Compensation.
- (3) *Earnings for services under non-equity incentive plans.* This does not include group life, health, hospitalization or medical reimbursement plans that do not discriminate in favor of executives and are available generally to all salaried employees.
- (4) *Change in pension value.* This is the change in present value of defined benefit and actuarial pension plans.
- (5) *Above-market earnings on deferred compensation which is not tax-qualified.*
- (6) Other compensation, if the aggregate value of all such other compensation (e.g., severance, termination payments, value of life insurance paid on behalf of the employee, perquisites or property) for the executive exceeds \$10,000.

***“Executive” means officers, managing partners, or any other employees in management positions.

Annex 4 UEI and SAM Registration Guidance

What is UEI?

The Unique Entity Identifier, or the UEI, is the official name of the “new, non-proprietary identifier” that will replace the DUNS number. The UEI will be requested in, and assigned by, the System for Award Management (SAM.gov). Businesses and organizations who receive funding from the US government will have to use a Unique Entity Identifier (UEI) created in SAM.gov. The UEI number helps the USG to identify companies.

Why am I being requested to obtain a UEI number?

U.S. law – in particular the Federal Funding Accountability and Transparency Act of 2006 (Pub.L. 109-282), as amended by section 6202 of the Government Funding Transparency Act of 2008 (Pub.L. 110-252) - make it a requirement for all entities doing business with the U.S. Government to be registered, currently through the System for Award Management, a single, free, publicly- searchable website that includes information on each federal award. As part of this reporting requirement, prime contractors such as Chemonics must report information on qualifying subawards as outlined in FAR 52.204-10 and 2CFR Part 170. Chemonics is required to report subcontracts with an award valued at greater than or equal to \$30,000 under a prime contract and subawards under prime grants or prime cooperative agreements obligating funds of \$25,000 or more, whether U.S. or locally-based. Because the U.S. Government uses UEI numbers to uniquely identify businesses and organizations, Chemonics is required to enter subaward data with a corresponding UEI number.

Is there a charge for obtaining a UEI number?

No. Obtaining a UEI number is absolutely free for all entities doing business with the Federal government. This includes current and prospective contractors, grantees, and loan recipients.

How do I obtain a UEI number?

UEI numbers can be obtained online at sam.gov.

What information will I need to obtain a UEI number?

To request a UEI number, you will need to provide the following information:

- Legal name and structure
- Tradestyle, Doing Business As (DBA), or other name by which your organization is commonly recognized
- Physical address, city, state and Zip Code
- Mailing address (if separate)
- Telephone number
- Contact name
- Number of employees at your location
- Description of operations and associated code (SIC code found at <https://www.osha.gov/pls/imis/sicsearch.html>)
- Annual sales and revenue information
- Headquarters name and address (if there is a reporting relationship to a parent corporate entity)

How long does it take to obtain a UEI number?

The UEI number is issued immediately upon completion of the request process.

Are there exemptions to the UEI number requirement?

There may be exemptions under specific prime contracts, based on an organization's previous fiscal year income when selected for a subcontract award, or Chemonics may agree that registration is impractical in certain situations. Organizations may discuss these options with the Chemonics representative.

What is CCR/SAM?

Central Contractor Registration (CCR)—which collected, validated, stored and disseminated data in support of agency acquisition and award missions—was consolidated with other federal systems into the System for Award Management (SAM). SAM is an official, free, U.S. government-operated website. There is NO charge to register or maintain your entity registration record in SAM.

When should I register in SAM?

While registration in SAM is not required for organizations receiving a grant under contract, subcontract or cooperative agreement from Chemonics, Chemonics requests that partners register in SAM if the organization meets the following criteria requiring executive compensation reporting in accordance with the FFATA regulations referenced above. SAM.gov registration allows an organization to directly report information and manage their organizational data instead of providing it to Chemonics. Reporting on executive compensation for the five highest paid executives is required for a qualifying subaward if in your business or organization's preceding completed fiscal year, your business or organization (the legal entity to which the UEI number belongs):

- (1) received 80 percent or more of its annual gross revenues in U.S. federal contracts, subcontracts, loans, grants, subgrants, and/or cooperative agreements; **and**
- (2) \$25,000,000 or more in annual gross revenues from U.S. federal contracts, subcontracts, loans, grants, subgrants, and/or cooperative agreements; **and**,
- (3) The public have **does not** have access to information about the compensation of the executives in your business or organization (the legal entity to which the UEI number it provided belongs) through periodic reports filed under section 13(a) or 15(d) of the Securities Exchange Act of 1934 (15 U.S.C. 78m(a), 78o(d)) or section 6104 of the US Internal Revenue Code of 1986.

If your organization meets the criteria to report executive compensation, the following sections of this document outline the benefits of and process for registration in SAM.gov. Registration may be initiated at <https://www.sam.gov>. There is NO fee to register for this site.

Why should I register in SAM?

Chemonics recommends that partners register in SAM to facilitate their management of organizational data and certifications related to any U.S. federal funding, including required executive compensation reporting. Executive compensation reporting for the five highest paid executives is required in connection with the reporting of a qualifying subaward if:

- a. In your business or organization's preceding completed fiscal year, your business or organization (the legal entity to which the UEI number belongs) received (1) 80 percent or more of its annual

gross revenues in U.S. federal contracts, subcontracts, loans, grants, subgrants, and/or cooperative agreements; and (2) \$25,000,000 or more in annual gross revenues from U.S. federal contracts, subcontracts, loans, grants, subgrants, and/or cooperative agreements; and,

- b. The public have does not have access to information about the compensation of the executives in your business or organization (the legal entity to which the UEI number it provided belongs) through periodic reports filed under section 13(a) or 15(d) of the Securities Exchange Act of 1934 (15 U.S.C. 78m(a), 78o(d)) or section 6104 of the Internal Revenue Code of 1986.

What benefits do I receive from registering in SAM?

By registering in SAM, you gain the ability to bid on federal government contracts. Your registration does not guarantee your winning a government contract or increasing your level of business. Registration is simply a prerequisite before bidding on a contract. SAM also provides a central storage location for the registrant to supply its information, rather than with each federal agency or prime contractor separately. When information about your business changes, you only need to document the change in one place for every federal government agency to have the most up-to-date information.

How do I register in SAM?

Follow the step-by-step guidance for registering in SAM for assistance awards (under grants/cooperative agreements) at: https://www.sam.gov/sam/transcript/Quick_Guide_for_Grants_Registrations.pdf

Follow the step-by-step guidance for contracts registrations at:

https://www.sam.gov/sam/transcript/Quick_Guide_for_Contract_Registrations.pdf

You must have a UEI number in order to begin either registration process.

If you already have the necessary information on hand (see below), the online registration takes approximately one hour to complete, depending upon the size and complexity of your business or organization.

What data is needed to register in SAM?

SAM registrants are required to submit detailed information on their company in various categories. Additional, non-mandatory information is also requested. Categories of required and requested information include:

* General Information - Includes, but is not limited to, UEI number, CAGE Code, company name, Federal Tax Identification Number (TIN), location, receipts, employee numbers, and web site address.

* Corporate Information - Includes, but is not limited to, organization or business type and SBA-defined socioeconomic characteristics.

* Goods and Services Information - Includes, but is not limited to, NAICS code, SIC code, Product Service (PSC) code, and Federal Supply Classification (FSC) code.

* Financial Information - Includes, but is not limited to, financial institution, American Banking Association (ABA) routing number, account number, remittance address, lock box number, automated clearing house (ACH) information, and credit card information.

* Point of Contact (POC) Information - Includes, but is not limited to, the primary and alternate points of contact and the electronic business, past performance, and government points of contact. * Electronic

Data Interchange (EDI) Information* - Includes, but is not limited to, the EDI point of contact and his or her telephone, e-mail, and physical address. (*Note: EDI Information is optional and may be provided only for businesses interested in conducting transactions through EDI.)

Annex 5 Past Performance Template

The following table must be completed and included in the Technical Volume. Include at least 3 projects that best illustrate experience relevant to this RFP or similar activities. Included projects must have been completed within the past 3 years.

#	Client Name, Address/Location, Telephone Number, Email	Contract or Purchase Order Number	Description of Activities or Work	Date of Work	Cost in AMD or USD
1					
2					
3					

Chemonics reserves the right to contact provided references to verify and, if applicable, request further information. Chemonics reserves the right to obtain past performance information obtained from sources other than those identified by the offeror. Chemonics shall determine the relevance of similar past performance information.

ANNEX 6

Case Study 1

The USAID Strategic Communications Support Activity (Activity) has received a request from the Government of Armenia (GOAM) to conduct a comprehensive nationwide assessment of the communications needs and gaps within the scope of the Public Administration Reform (PAR). This assessment aims to evaluate the communications needs/demands related to PAR, identify the related information gaps, and provide recommendations on enhancing the effectiveness of the GOAM's strategic communications efforts in relation to PAR. The Activity requires the Subcontractor to conduct a detailed study encompassing several research methodologies and tools, including *desk research, stakeholder mapping, stakeholder consultations, empathy mapping, surveys, in-depth and key informant interviews, and focus group discussions*.

The Subcontractor is expected to deliver a series of comprehensive deliverables that translate the collected data and insights into actionable, informative, and engaging products.

The illustrative deliverables are:

- Detailed desk research report that outlines the methodology, summarizes the key findings, and provides strategic insights and recommendations based on the reviewed materials/literature.
- Comprehensive report that maps key stakeholders, summarizes stakeholder inputs, provides insights into their views, and offers recommendations based on the stakeholders' feedback.
- Survey and KII questionnaires, stakeholder consultation and focus group discussion guides.
- Empathy maps and personas, illustrating the emotional and psychological factors influencing public attitudes.
- Final report that outlines the assessment methodology, sampling, provides analysis, summarizes the key findings, and provides recommendations.
- Interview recordings, transcripts and datasets- the Subcontractor must provide digital interview recordings/transcripts/summaries and raw and clean datasets, cross tabulations, as applicable, depending on the nature of the research task.
- Interactive presentations, including slide decks and infographics to summarize key findings and recommendations.
- Interactive data dashboards for dynamic exploration of the collected data.

The deliverables must be submitted in English and Armenian, except for interview recordings, transcripts and datasets, which can be submitted in the original language.

The Subcontractor's proposal must detail the methodology, approach, and/or process, including communications and confirmations with the Activity, to provide the requested service. The Subcontractor must also detail the approach to creating the above-mentioned deliverables, emphasizing how they will enable the Activity to implement the recommendations effectively.

Case Study 2

The Activity has received a request from the GOAM to conduct a needs assessment of the existing MEL-related systems, processes, and practices within the Office of the Prime Minister (OPM). Based on the conducted assessment tailored MEL systems, processes, and practices will be designed and introduced, and relevant capacity building will be conducted. The Activity requires the Subcontractor to conduct a benchmarking and feasibility study to evaluate existing MEL systems, processes, and practices, perform a

comprehensive needs assessment and gap analysis to identify individual and organizational capacity needs, analyze business processes, including interactions, systems, and organizational functionality, to pinpoint inefficiencies and areas for improvement. Based on the conducted needs assessment, the Subcontractor is requested to design and introduce tailored MEL-related systems, processes, and practices and implement subsequent capacity building activities for the OPM's relevant staff. The Activity requires the Subcontractor to conduct a detailed study encompassing several research methodologies and tools, including *benchmarking and feasibility study, needs assessment and gap analysis, business process analysis*, as well as provide *ad-hoc MEL services, and subsequent capacity building*.

The Subcontractor is expected to deliver a series of comprehensive deliverables that translate the collected data and insights into actionable, informative, and engaging products.

The illustrative deliverables are:

- Detailed report that outlines the benchmarking and feasibility methodology, presents comparative analyses, and highlights areas for improvement as well as an in-depth evaluation of the intervention's potential, including recommendations for implementation or necessary adjustments.
- Needs assessment report that outlines the methodology, key findings, and strategic recommendations for addressing the identified needs and gaps. The Subcontractor will also provide a clean database (raw data) and a presentation of the main findings, including visualizations such as charts and graphs to illustrate the results.
- “As is” and “to be” business process diagrams and recommendations for implementation.
- Final report on tailored MEL-related systems, processes, and practices detailing the designed and introduced services, recommendations, as well as deployed and tested systems and processes.
- Capacity building plan, curriculum, report detailing the trainings conducted, participant engagement, outcomes achieved (both quantitative and qualitative), and recommendations for future capacity building efforts.
- Interactive presentations, including slide decks and infographics to summarize key findings and recommendations.
- Interactive data dashboards for dynamic exploration of the collected data.

The deliverables must be submitted in English and Armenian.

The Subcontractor's proposal must detail the methodology, approach, and/or process, including communications and confirmations with the Activity, to provide the requested service. The Subcontractor must also detail the approach to creating the above-mentioned deliverables, emphasizing how they will enable the Activity to implement the recommendations effectively.

Case Study 3

Within the framework of the ongoing tax administration reform, the GOAM has requested the Activity to conduct preparatory research to inform an upcoming communications campaign. This research aims to equip the State Revenue Committee (SRC) with the necessary tools, techniques, and evidence to roll out a nationwide communications campaign effectively. The primary objectives of this research are to conduct comprehensive panel research to track changes in public opinion over time, perform audience segmentation research to identify and understand distinct demographic groups, test various messages to determine the most effective communications strategies, and conduct polling to gather quantitative data on public attitudes and opinions. The Activity requires the Subcontractor to conduct a detailed study encompassing several

research methodologies and tools, including *panel research*, *audience segmentation research*, *message testing*, and *polling*.

The Subcontractor is expected to deliver a series of comprehensive deliverables that translate the collected data and insights into actionable, informative, and engaging products.

The illustrative deliverables are:

- Panel research report outlining the methodology, key findings, and trends observed over time that includes visualizations such as charts and graphs to illustrate changes in public opinion.
- Detailed audience segmentation report that outlines the methodology, identifies and describes each segment, offers strategic recommendations for targeting these segments, and provides clear and actionable recommendations on communicating with all the identified audiences.
- Message testing report summarizing the results of message testing, including which messages were most effective for each audience segment and why, as well as recommendations for message refinement and deployment.
- Polling data and analysis report presenting the methodology, raw data, and analysis of polling results, including insights into public attitudes and recommendations for addressing identified concerns or leveraging support.
- Interactive presentations, including slide decks and infographics to summarize key findings and recommendations.
- Interactive data dashboards for dynamic exploration of the collected data.

The deliverables must be submitted in English and Armenian except for any raw data which can be submitted in the original language.

The Subcontractor's proposal must detail the methodology, approach, and/or process, including communications and confirmations with the Activity, to provide the requested service. The Subcontractor must also detail the approach to creating these deliverables, emphasizing how they will enable the Activity to implement the recommendations effectively.