



PANAGORAGROUP

REQUEST FOR PROPOSAL (RFP)

RFP Number: FY24-ZAF-RFP 008-Amendment 1

Issue Date: Tuesday, October 24, 2023

Proposal Due Date and Time: Tuesday, November 7, 2023 at 12:00 (SAST)

Questions Due Date: Tuesday, October 31, 2023 at 12:00 (SAST)

Description: The purpose of this Amendment is to provide responses to Offerors' questions.

For: Technical Support Services (TSS) Activity for the United States Agency for International Development (USAID)

Funded by: United States Agency for International Development (USAID), Contract No. 72067419c0001

Implemented by: Panagora Group

Type of Award: One or more Indefinite Delivery, Indefinite Quantity Contract with Task Orders for individual scopes of work

Point of Contact: info@panagorasouthafrica.net

ETHICAL AND BUSINESS CONDUCTS REQUIREMENTS

Panagora Group is committed to integrity in procurement, and only selects suppliers based on objective business criteria such as price and merit. Panagora expects suppliers to comply with our standards terms and conditions. Panagora does not tolerate fraud, collusion among offerors, or falsified proposals or bids. Any firm or individual violating these standards will be disqualified from this procurement and barred from future procurement opportunities. In addition, Panagora will inform USAID of any supplier offers of money, commissions, or gifts to obtain business. Employees and agents of Panagora are strictly prohibited from asking for or accepting any money, fee, commission, credit, gift, gratuity, or object of value from current or potential vendors or suppliers in exchange for or as a reward for business. Offerors responding to this RFP must disclose and include the following information as part of the proposal submission:

- Close, familial, or financial relationships with Panagora Group or activity staff. For example, if an offeror's cousin is employed by the activity, 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 proposal 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 NAME OF SUBCONTRACTOR' prohibitions against fraud, bribery and kickbacks.

Please contact Operations@panagoragroup.net with any questions or concerns regarding the above information or to report any potential violations.

Responses to Questions

1. Please could you say more about this criteria: “Demonstrated understanding of DEI principles, and principles of locally-led development, including proactively addressing internal systems that potentially inhibit inclusive, diversity and equity efforts.”

Panagora Response: This question refers to Evaluation Criteria 1, bullet 3. Please see USAID’s Diversity, Equity, and Inclusion (and Accessibility) webpage for more information: <https://www.usaid.gov/about-us/diversity-equity-inclusion>, and USAID’s locally-led development fact sheet here: <https://www.usaid.gov/documents/what-locally-led-development-fact-sheet>. These principles should be considered in all organizational development activities. For evaluation purposes, please address these principles in your approach.

2. Are these systemic barriers, leadership barriers, culture barriers? Please can you clarify what you mean by “internal systems.” Examples would be appreciated to make sure I am understanding clearly what you are looking for here.

Panagora Response: Any or all of these barriers may exist. “Internal systems” refers to operational processes. Specific needs will be addressed at the task order level. Proposals in response to this RFP could include how your organization addresses barriers or improves internal systems through organizational development training or meeting facilitation. Please refer to RFP Section 3: Specifications and Technical Requirements for illustrative examples.

3. Should we get awarded with an IDIQ, would there be agility to include other team members on the delivery team at the time of receiving a specific TO?

Panagora Response: The purpose of evaluating staffing is to ensure that Offerors have qualified individuals that will be available to perform the work. Each Task Order (TO) scope of work and any subsequent negotiations will determine the required qualifications of team members.

4. Would we need to provide VAT inclusive rates, as my understanding is that we cannot charge VAT on top of the cost estimates provided. Is this understanding correct? Or would the costs be VAT exempt given the work is funded by USAID?

Panagora Response: Please provide rates exclusive of VAT as TSS is tax exempted given that the work is funded by USAID.

5. Please can you clarify what a DUNS number is?

Panagora Response: The US Government has replaced the DUNS number with the Unique Entity ID (UEI) number. Please see Section 1.11 for more information on the UEI number. In Annex 1, please enter your UEI number in the line for DUNS number.

6. What is the timeframe for the contract?

Panagora Response: The IDIQ will likely be valid through July 2025.

7. What is the budget for the contract?

Panagora Response: The IDIQ does not have a budget associated with it. Please see RFP Section 1.6.B and Attachments B.1 and B.2 for details on how Offerors should provide an *illustrative fee-for-*

service budget to demonstrate the Offeror's understanding of the scope of work (their approach to an engagement). Please see Section 3.2 for examples that you may use in your illustrative budget. The budget should demonstrate your understanding of training and facilitation engagements and costs for each step of the engagement. Attachment B.1 demonstrates one such step, a kick-off meeting. As another examples, Offerors may show a higher level of effort to develop new curriculum than it does to customize current curriculum and/or Offerors may charge different rates for different types of facilitation.

8. How far in advance will the consultant be contacted with the task order, prior to the work being required?

Panagora Response: The purpose of the IDIQ contracting structure is to have qualified offerors shortlisted so to minimize the time between Task Order scope of work development and an engagement. It is anticipated that TSS could release a scope of work that requires service delivery within two weeks.

9. Is the deadline for submission Nov 7th?

Panagora Response: The proposal due date has been extended to Tuesday, November 7, 2023 at 12:00 (SAST).

10. Are there specific coaching objectives and deliverables?

Panagora Response: We are currently in the IDIQ RFP phase with an overarching objective and illustrative examples found in RFP Section 3: Specifications and Technical Requirements. Individual task orders (TO) will be initiated based on specific needs defined in TO scopes of work, which will include more specific objectives and deliverables.

11. Length of contract?

Panagora Response: Please see response to Question 6.

12. Do we need to included a calculation for annual increases?

Panagora Response: Similar to our response to Question 7, RFP Section 1.6.B and Attachments B.1 and B.2 provide details on how Offerors should provide an *illustrative fee-for-service budget* to demonstrate the Offeror's understanding of the scope of work (their approach to an engagement). Please see RFP Section 3 for illustrative engagements that you may use in your illustrative budget. Each TO engagement is not expected to last more than a year, so there is no need to include annual increases in the budget. You may include your annual increase rate in your budget narrative, see Attachment B.2.

13. Expected LOE?

Panagora Response: We are currently in the IDIQ RFP phase with illustrative examples of training and facilitation needs found in RFP Section 3: Specifications and Technical Requirements. Individual task orders (TO) will be initiated based on specific needs defined in TO scopes of work. For your illustrative budget, Offerors are asked to estimate the level of effort (LOE) needed for their approach. See response to Question 7 for more details and examples.

SECTION 3: SPECIFICATIONS AND TECHNICAL REQUIREMENTS (SCOPE OF WORK)

1. Objective

The purpose of this RFP is to identify and engage one or more service provider(s) (individual or company) to provide organizational and/or leadership development training program(s) and/or coaching (herein “training”), and/ or facilitate meetings to select groups, units, departments, and/or individuals within USAID (herein “participants”). The selected service provider(s) will be responsible for designing and delivering customized / tailored sessions that address the specific needs and challenges faced by the participants. The objective of the training(s) is to enhance team dynamics, improve communication, foster effective leadership, cultivate a positive work culture, and increase collaboration.

In addition to specific trainings, the service provider may be engaged to support in-person or online meetings, which may utilize a graphic recording (silent-observation) and/or facilitation method. The full scope of work could including but is not limited to developing the meeting agenda, ensuring diverse perspectives are heard, finding common ground among participants, harvest learning from sessions, and develop an after-event report with lessons learned, milestones achieved, and recommendations of next steps.

2. Description and Purpose

Each engagement will have a scope of work with desired outcomes. The training or facilitation will often commence with a thorough needs assessment and consultation with key stakeholders to understand the current organizational, leadership, or meeting issues and goals. Based on the assessment, a customized curriculum and/or agenda will be designed to meet the specific requirements of the participant(s).

The training content may include, but is not limited to, the following topics:

- Understanding and leveraging individual strengths within the team
- Enhancing communication and collaboration among team members
- Effective conflict resolution and problem-solving techniques
- Building effective leadership and management skills
- Cultivating a positive and inclusive work culture
- Change management and adaptability in a dynamic environment

Facilitation needs may include, but is not limited to:

- Co-creation
- Collaborative design
- Strategy sessions
- Engagement with local stakeholders
- Conflict mediation
- Partnership negotiations
- Departmental alignment

The sessions will be conducted in a format that best suits the participant(s)' schedule and preferences, which could include on-site workshops, virtual sessions, individual study (i.e. homework), or a combination. The service provider will ensure the provision of qualified trainers and/or facilitators with required expertise.

Throughout the sessions, regular progress evaluations and feedback will be conducted to assess effectiveness and make any necessary adjustments. Participants will be encouraged to provide feedback to ensure services align with their needs and expectations.

In conclusion, the purpose of this Scope of Work is to equip USAID with the necessary skills and insights to foster a high-performing, motivated, and cohesive work environment. This Scope of Work will be an investment in the professional growth of team members and will contribute to the long-term success of the agency.

3. Location

The assignment will involve multiple meetings with USAID and Panagora team members (primarily virtual, with the option for in-person meetings at USAID's throughout Southern Africa or Panagora's offices in Pretoria, South Africa). **Applicants should not include travel costs in their proposal.**

4. Illustrative Tasks

- **Per Training**

- Participate in a kick-off meeting with USAID and Panagora to discuss training objectives.
- Conduct a thorough needs assessment with participant(s), gauge knowledge and attitudes.
- Customized curriculum to meet the specific requirements of the participant(s).
- Deliver training sessions that may include in-person workshops, virtual sessions, self-paced exercises, or a blended approach.
- Provide training materials, which may include subscription based or pay-to-utilize methodologies appropriate for the training.
- Provide supplies such as flipcharts, markers, sticky notes, and audio-visual equipment.
- Solicit feedback and adapt training as required.
- Conduct post-training surveys to assess the impact of the training and identify areas for continuous improvement.

- **Per Facilitation**

- Support client with the development of the event agenda.
- Propose an approach to ensure diverse perspectives are heard.
- Support the development and preparations for online or in-person facilitation for the workshop and/or meeting.
- Provide experienced facilitator trained in appreciative inquiry methods to leverage the strength of participants.

- Provide a silent observer to conduct graphic recordings. Content will include the spirit and words as interpreted by the facilitator and synthesized to create a unique graphic based on the facilitator's vision (with client approval).
- Provide training materials, which may include subscription based or pay-to-utilize methodologies appropriate for the engagement.
- Provide supplies such as flipcharts, markers, sticky notes, and audio-visual equipment.
- Harvest learnings and next steps from sessions.
- Write an after-event report to highlight lessons learned, milestones achieved, and recommendations of next steps.

E. Deliverables

The schedule of deliverables and due dates will be confirmed upon task order award.

F. Required Experience and Credentials

- Relevant training materials developed and demonstrated experience delivering organizational and leadership training(s) with creativity and flexibility.
- Demonstrated expertise in organizational psychology, leadership development, and team dynamics, or other relevant and demonstrated expertise.
- Proven track record in adult education curriculum development and training facilitation, with particular focus on behavioral change methodologies.
- Experience in meeting facilitation.
- Preferable licenses and/or certifications: Professional Certified Coach (PCC), Accredited Coach Training Program (ACTP), International Coaching Federation (ICF) Accreditation, Association for Coaching Certification (ACC), Senior Professional in Human Resources (SPHR), Professional in Human Resources (PHR), Society for Human Resource Management (SHRM), Society for Coaching Psychology (SCP), Myers-Briggs Type Indicator (MBTI), High-Performance System (HPS), Certified Professional in Learning and Performance (CPLP), or similar.

SECTION 4: DECISION AND NOTIFICATION

The Offerors must submit their proposal in response to this RFP no later than the date and time specified on Page 1 of the RFP, by email to email address. Please reference the RFP number in any response to this RFP. Offers received after the specified time and date will be considered late and will be considered only at Panagora's discretion.

1. Confidentiality

Information regarding review, evaluation, comparison, and subsequent rating of the proposal and the recommendation for awarding the Indefinite Delivery, Indefinite Quantity (IDIQ) and any subsequent task orders not be revealed to offerors or other persons who have no official involvement in said process.

Any attempt by an offeror to influence Panagora with respect to the review, evaluation, comparison, and subsequent rating of the proposal or awarding of the IDIQ and any subsequent task order will result in that offeror's proposal being rejected.

As soon as the period for reviewing proposal opens, if any of the offerors would like to contact the contracting entity about matters related to the solicitation process, they should do so in writing.

2. Clarifications regarding proposals

To assist in the review, evaluation, comparison, and subsequent rating of the proposals, Panagora may, at its discretion, request clarifications from an offeror regarding its proposal. Any clarifications presented by offerors which are not in response to a request by the contracting entity will be disregarded. Requests for clarification and responses thereto will be in writing.

3. Conformance of proposals

Panagora Group's determination of the responsiveness of a proposal will be based on the proposal itself. A substantially responsive proposal is one that fulfills the terms, conditions, and specifications of the solicitation without significant deviations, reservations, or omissions. A significant deviation, reservation, or omission is one that:

- Affects in a substantial manner the scope, quality, or performance of the items specified in the Purchase Order, or
- Limits in a substantial manner, in contradiction to the solicitation, Panagora's rights or the offeror's obligations pursuant to the Purchase Order, or
- If corrected, would unfairly affect the competitive position of other offerors that present proposal that substantially conform to the requirements.

4. Preliminary review of proposals

Panagora will review the proposal to confirm that all the documents that comprise the proposal (the legal documents and the proposal) have been submitted. It will likewise review the legal documents

to determine the integrity of each of the documents presented. If any of the legal documents required are missing, the proposal will be rejected.

5. Review of the terms and conditions

Panagora will review the proposal to confirm that the offeror has accepted all the terms and conditions specified in the RFP without any deviations or reservations. Once the terms and conditions have been reviewed, if Panagora determines that the proposal does not substantially conform to the requirements, said proposal will be rejected.

6. Evaluation of proposals

Panagora will evaluate each proposal that has been determined up to that stage of the evaluation to substantially conform to the requirements requested.

To evaluate a proposal, Panagora will use all the methods and criteria defined in this RFP. No other criteria or methodology will be allowed. Panagora will evaluate the technical aspects of the items included in the proposal in keeping with this RFP.

7. Cancellation of the solicitation

Panagora reserves the right to cancel the RFP process and reject all the proposal at any time prior to awarding the IDIQ and any subsequent task order, without incurring any obligation to offerors for this reason.

8. Award criteria

One or more proposal that meet the evaluation criteria may be awarded with an IDIQ-type contract, with individual task orders negotiated with individual IDIQ holders as services are required by the Technical Support Services Activity.

9. Notification

Prior to expiration of the proposal validity period, Panagora will notify any successful offeror in writing if its proposal has been accepted. At the same time, Panagora will also notify the other offerors of the results of the solicitation.

10. Indefinite Deliver Quantity Contract signing

Immediately following the notification, Panagora will send any successful offeror the IDIQ documents. Within five (05) days of receiving said contract documents, the winning offeror is to sign, date, and return them to Panagora.

11. Task Orders

Individual task orders (TO) will be initiated based on specific scopes of work. IDIQ holders offering required services related to Section C may be awarded a TO based on the IDIQ evaluation without further competition. If there are more than one IDIQ holders with similar qualifications for required services in the given country or if the SOW differs substantially from Section C, the IDIQ holders may be requested to provide additional information to aid in the selection of the TO awardee. Budget negotiations will take place for each TO engagement based on the TO scope of work.

SECTION 5: Annexes

**ANNEX 1
PROPOSAL COVER LETTER**

The following cover letter must be placed on letterhead and completed/signed/stamped by a representative authorized to sign on behalf of the offeror:

Technical Support Services Activity
Panagora Group
90 Florence Ribiero Avenue
Walker Creek Office Park
Building 3, First Floor
Muckleneuk, Pretoria

Reference: FY24-ZAF-RFP 008-Organizational and Leadership Development

To Whom It May Concern:

We, the undersigned, hereby provide the attached proposal to provide organizational and leadership development trainings required to complete the activities and requirements as described in the above-referenced RFP. Please find our proposal attached.

We hereby acknowledge and agree to all terms, conditions, special provisions, and instructions included in the above-referenced RFP. We further certify that the below-named firm—as well as the firm’s principal officers and all services offered in response to this RFP—are eligible to participate in this procurement under the terms of this solicitation and under USAID regulations.

Furthermore, we hereby certify that, to the best of our knowledge and belief:

- We have no close, familial, or financial relationships with any Panagora Group or the Technical Support Services activity staff members.
- We have no close, familial, or financial relationships with any other offerors submitting proposals in response to the above-referenced RFP; and
- The prices in our proposal have been arrived at independently, without any consultation, communication, or agreement with any other offeror or competitor for the purpose of restricting competition.
- All information in our proposal and all supporting documentation is authentic and accurate.
- We understand and agree to Panagora Group’ prohibitions against fraud, bribery, and kickbacks.

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

Authorized Signature:

Date: _____

Name and Title of Signatory Company Name: _____

Company Address: _____

Company Telephone _____ and Website: _____

Company Registration or Taxpayer ID Number: _____

Company DUNS Number: _____

Does the company have an active bank account (Yes/No)? _____

Official name associated with bank account (for payment): _____

Annex 2
Section 889 Telecommunications and Video Surveillance Equipment and Services
For Vendors

Vendor Name: _____
Country: _____
Prime/Subcontract Name: _____
Date: _____

1. As a U.S. government contractor, Panagora is prohibited from utilizing any telecommunications and/or video surveillance equipment or services from any of the following companies (or their subsidiaries and affiliates).

- a. Huawei Technologies Company
- b. ZTE Corporation
- c. Hytera Communications Corporation
- d. Hangzhou Hikvision Digital Technology Company
- e. Dahua Technology Company

Please note that telecommunications services also include Internet, telephones, and cell/mobile phone services and equipment.

Does any of the services or equipment being purchased or obtained from you originate from or were manufactured from any of the above companies? **Please answer 0 Yes or 0 No**

1a. If you responded “Yes” to Question 1, please describe the equipment and/or services you are providing and the name of each company? *Skip this question if it does not apply.*

Name of Covered Company	Description of Equipment and/or Services

1b. Based on information provided under 1a. above, would it be possible to replace any of the listed equipment and/or services with non-covered telecommunications or video surveillance equipment or services? **Please answer 0 Yes 0 No.**

1.b.1 If yes, please provide the make/model and detailed specifications of the equivalent replacement item(s).

1.b.2 How long will it take to replace the covered equipment and/or service with non-covered equipment and/or service?

Vendor Representation

You confirm that based on the information you provided resulting from Panagora’s reasonable inquiry into the supply and utilization of covered telecommunications and video surveillance equipment and services (*Choose One Answer*):

- a. You will not supply or utilize covered equipment or services in this order _____
- b. You will immediately discontinue supplying or utilizing covered equipment or services under the order _____

The person completing this form should complete the following section and sign.

Print Name: _____

Title: _____

Signature: _____

Date: _____

End of Representation