

REQUEST FOR PROPOSAL

Issue Date:	October 17, 2023
Questions Submission Due Date:	October 20, 2023, 6:00pm Eastern Standard Time
Original Proposal Submission Due Date:	October 27, 2023, 6:00pm Eastern Standard Time
Revised Proposal Submission Due Date:	November 3, 2023, 6:00 pm Eastern Time
Subcontract Type	Firm-Fixed Price

Subject: Developing Massive Open Online Courses (MOOC) for the USAID-funded Climate Finance Training

All Prospective Offerors:

International Development Group Advisory Services, LLC (International Development Group LLC or IDG) is soliciting proposals from qualified organizations to provide technical services as described in this solicitation. This procurement will require a formal technical and cost proposal submission as outlined by the Request for Proposal (RFP). This procurement will be conducted through a full and open competition process under which any type of organization is eligible to compete. IDG anticipates awarding a Firm-Fixed Price Contract through the Technical Assistance Project for Economic Growth (TAP EG) with an estimated period of performance of six months from the date of award as a result of this solicitation. Competition under this procurement will be full and open.

Questions regarding this opportunity must be submitted on or before the due date and time listed above to **procurement@internationaldevelopmentgroup.com**. In the subject line reference: Questions – **Developing MOOCs for the USAID-funded Climate Finance Training**.

All proposals, consisting of the documentation required, must be submitted electronically to **procurement@internationaldevelopmentgroup.com** on or before the due date stipulated above. All submitted documents must conform to the requirements outlined in the solicitation.

Documents received after the deadline will not be considered. This solicitation in no way obligates TAP EG or IDG to award a contract nor commit to pay any cost incurred in the preparation and submission of a proposal.

Thank you for your interest in working with IDG.

Sincerely,

IDG Procurement Team

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SECTION A. STATEMENT OF WORK

A1. BACKGROUND AND INTRODUCTION

Background

USAID’s Bureau for Inclusive Growth, Innovation and Partnership (IPI) fosters economic transformation and growth together with partner country governments and local communities to build stable, strong, and inclusive economies. The Center’s successful partnerships include regional, national and local institutions, governments, private sector investors, development assistance organizations including multilateral development banks, financial institutions, the Interagency and other donors fostering economic development. As the Agency lead on Inclusive Economic Growth, IPI prioritizes climate action and sustainable transformation to address global concerns through economic and trade policies, legal and regulatory frameworks, programs creating stable enabling environments for businesses and investors, and technical assistance that builds lasting capacity for successful and continuous climate action.

To achieve these outcomes, IPI strives to build the technical capacity, efficiency and effectiveness of the USAID workforce by offering structured and customized courses in economic analysis, trade, and development finance, among other topics. IPI also has a successful track record of partnering with other USAID technical offices and experts to deliver training focusing on the nexus between economic development and climate change. For example, IPI partners with the Bureau for Development, Democracy, and Innovation’s (DDI) Center for Environment, Energy, and Infrastructure (EEI) Climate and Cross-Sectoral Strategies Division and the Natural Climate Solutions Division to prepare an online training module on "Scaling Up Financing for Clean Energy, Sustainable Landscapes, and Climate Adaptation" available now on USAID University, as well as the first volume of an e-textbook on climate finance, “Introduction to Financing Climate Change Mitigation and Adaptation”.

IPI has determined there is a great need for technical training of USAID staff on the intersection of climate change, economic growth and transformation, and finance as missions help partners address climate risks, vulnerabilities, and development threats at the local, national, regional, and global levels. Economic growth is measured per capita while economic transformation encompasses sustainability, equity, and types and sources of growth. To meet this critical need, TAP EG will assist the IPI in developing and delivering a Climate Finance Training on finance and economic topics for climate change mitigation and adaptation in collaboration with other USAID operating units.

The course will be limited to USAID staff and will take 4.5-5.0 full-day equivalents (delivered in half-day sessions over a multi-week period). One issue for further discussion is whether participants will be expected to register through USAID University and attend the entire course or be allowed to register for just the specific sessions within their main interests. A second issue to be decided is whether there should be a limit on the number of participants to enhance the learning experience or keep participation fully open to maximize the number of staff benefiting. A third issue to be addressed is whether the course (or portions of it) can be eligible for continuous learning points (CLPs).

Purpose

The primary objectives of the course are to improve the capacity of USAID staff to:

- Understand key terms and principles of climate-related finance and the USAID Climate Strategy;
- Communicate the advantages and disadvantages of various types of climate finance;

- Understand international trade issues relating to climate change mitigation, including commodity-related deforestation and carbon border adjustment mechanisms;
- Discuss the costs and benefits of climate change mitigation and adaptation;
- Demand and interpreted work products of IPI and other Operating Units relevant for climate finance and economics; and
- Apply new skills and knowledge of climate finance and economics in designing, implementing, monitoring, and adapting programs and activities supporting the Agency's Climate Strategy (2022-2030), Agency Policy Framework, and Economic Growth Strategy.

Course Design

The course will be delivered online with an option for in-person participation in Washington, DC in January-February 2024. In-person delivery will take place at the RRB or USAID Annex. The course content will be developed by IPI staff and other USAID operating units. A preliminary list of topics and approximate time allocations follows:

Introduction to Climate Finance (0.5 days)

- Overview and amounts, sources, types, and uses of climate finance (Eric Hyman, IPI)
- Key terms and principles for climate finance, including blended finance (Eric Hyman)
- USAID Climate Finance Roadmap, 2022-2030, targets and achievements (Sashi Jayatileke or Lucas Isakowitz, EEI Climate Finance Team)

How USAID Can Help (0.5 days)

- How USAID can support climate finance transactions, including blended finance and results-based finance (Lawrence Camp, IPI)

Climate Mitigation Finance (two half-days)

- International public and private sector climate funds (Eric Hyman)
- Opportunities for scaling up clean energy financing (Eric Hyman)
- Opportunities for scaling up natural climate solutions financing (Eric Hyman, IPI and Larisa Warhol, EEI/NCS)
 - Reducing Deforestation and Forest Degradation (REDD+)
 - Payments for environmental services (PES)
- USAID mechanisms for financing climate mitigation (Lucas Isakowitz, EEI Climate Finance Team)
- Financing climate change mitigation through urban development and transportation systems (EEI/Green Cities)

Climate Adaptation Finance (0.5 days)

- Opportunities for scaling up adaptation financing (Eric Hyman)
- Parametric insurance for renewable energy generation (Eric Hyman)
- Weather-indexed insurance to help farmers adapt to climate risks (Kathryn Stahlberg, RFS/Resilience)
- Public-private partnerships for climate adaptation and urban disaster risk reduction in India (Eric Hyman)
- USAID mechanisms for financing climate adaptation (Jonathan Cook, RFS/Resilience)

Fiscal Policies and Climate Finance (0.5 days)

- Context: shrinkage of fiscal space for low- and middle-income countries after the spike in risk-aversion of international investors in 2022-23 (Janine Mans, DRG/GOV)
 - Availability of international sovereign and project finance; impact on domestic markets
 - Reprofitting, debt rescheduling, and future market access
 - Adjusting the primary fiscal deficit
- Debt-for-climate swaps for distressed government debt (Eric Hyman and Bayasgalan Rentsendorj)
- Managing government spending to address climate change (Janine Mans, DRG/GOV)
 - Macro-fiscal planning and climate change
 - Budgeting and infrastructure planning to address climate change mitigation goals
 - Budgeting and infrastructure planning to improve climate change adaptation and disaster response
 - Green procurement
 - Emergency spending processes and protocols
 - Climate audits
- Fiscal incentives for the green transition (Eric Hyman and DRG/Governance)
 - Carbon taxes
 - Fossil fuel subsidy reductions
 - Compliance carbon markets)
 - Voluntary carbon markets
- Effectiveness of fiscal incentives (Janine Mans or David Dod, DRG/Gov,)

Enabling Environment for Private Climate Finance (0.5 days)

- Renewable energy auctions and policies for distributed energy resources (EEI/Energy and Eric Hyman)
- Decreasing regulatory burdens of emission reduction compliance (Moussa Traore)
- Helping nonfarm SMEs adapt to climate risks (Moussa Traore)
- U.S. International Development Finance Corporation Examples of Climate (DFC, TBD)

Climate Change and Economic Growth (0.5 days)

- Climate change risks to economic growth (Nathan Martinez, IPI)
- Social cost of greenhouse gases (Eric Hyman)
- Marginal abatement costs (Eric Hyman)
- Costs and benefits of climate change adaptation (Eric Hyman)

Trade (0.5 days)

- Tariffs and trade barriers (Paul Fekete and IPI/Trade team)
- Border, transit and logistics issues affecting climate change mitigation (Paul Fekete and IPI/Trade team)
- Commodity deforestation trade restrictions (Alicia Grimes, EEI/NCS)
- Increasing supply chain sustainability (Alicia Grimes and Larisa Warhol, EEI/NCS)
- Carbon border adjustment mechanisms and implications for USAID partner countries (Eric Hyman)

Illegality and Natural Resource Corruption (0.5 days)

- Illegal logging and deforestation, land grabs, natural resource corruption (Alicia Grimes, EEI/NCS)

- Transnational crime (Brooke Sterns Lawson)

Development and Purpose of the MOOCs

Since IDG has begun implementing this activity, USAID has requested IDG to develop MOOCs based on the in-person training to take place in January-February 2024. USAID has prioritized 31 modules (highlighted in green below) out of a list of 44 modules to be prioritized to develop into MOOCs. **The Subcontractor will develop 31 MOOCs based on the 31 prioritized modules listed below.** USAID may request the Subcontractor to develop MOOCs based on the other topics at a later time.

<i>Training Topic (Priority Sessions Highlighted in Yellow)</i>	<i>MOOC - single video / combined video</i>	<i>MOOC - Length of Videos (e.g. 45 min.)</i>	<i>Knowledge Check Questions Placement</i>	<i>Knowledge Check - Grading</i>	<i>Reference Material (additional reading optional)</i>
<u>Introduction to Climate Finance (0.5 days)</u>					
Introduction (Jacqueline Musiitwa, Sashi Jayatilike, Lucas Isakowitz, Climate Finance Team)	Single Video	1 hour			No Reading
Global landscape of climate finance -- amounts, sources, types, and uses (Eric Hyman, EMD)	Single Video	1 hour	During Session	Ungraded	Additional Reading
Key terms and principles for climate finance, including blended finance (Eric Hyman)	Single Video	1:30 hours	After Session	Graded	Additional Reading
USAID Climate Finance Roadmap, 2022-2030, targets and achievements (Lucas Isakowitz or Sashi Jayatileke, Climate Finance Team)	Single Video	1 hour			Additional Reading
<u>How USAID Can Help (0.5 days)</u>					
Introduction to Climate Finance and why it matters (Lawrence Camp)	Single Video	45 minutes	After Session	Ungraded	
Understanding the Finance Marketplace (Lawrence Camp)	Single Video	45 minutes	After Session	Ungraded	
What can we do - USAID tools and interventions (Lawrence Camp)	Single Video	45 minutes	After Session	Ungraded	
Bringing it together - Becoming a finance catalyst (Lawrence Camp)	Single Video	45 minutes	After Session	Ungraded	
<u>Climate Mitigation Finance (two half-days)</u>					
Social cost of greenhouse gases (Eric Hyman)	Single Video	1 hour	After Session	Graded	Additional Reading
International public and private sector climate funds (Eric Hyman)	Single Video	1 hour	After Session	Graded	Additional Reading
Opportunities for scaling up clean energy financing (Eric Hyman)	Single Video	1 hour	After Session	Graded	Additional Reading
Opportunities for scaling up natural climate solutions financings (Eric Hyman and Larisa Warhol, EEI/NCS)	Single Video	1:30 hours	After Session	Graded	Additional Reading
Reducing Deforestation and Forest Degradation (REDD+) (Eric Hyman and Evan Notman, NCS)	Single Video	1 hour	After Session	Graded	Additional Reading
Payments for environmental services (PES) (Eric Hyman and Samuel Rivera Reyes)	Single Video	1 hour	After Session	Graded	Additional Reading
USAID mechanisms for financing climate mitigation (Lucas Isakowitz or Sashi Jayatileke, I Climate Finance Team)	Single Video	1 hour			No Reading
Financing climate change mitigation through urban development and transportation systems (Monica Bansal and/or Andrew Fang, EEI/Green Cities)	Single Video	1 hour	After Session	Graded	Additional Reading

<u>Climate Adaptation Finance (0.5 days)</u>					
Costs and benefits of climate change adaptation (Eric Hyman)	Single Video	1 hour	After Session	Graded	Additional Reading
Infrastructure adaptation measures (Eric Hyman)	Single Video	1 hour	After Session	Graded	Additional Reading
Opportunities for scaling up adaptation financing (Eric Hyman)	Single Video	1 hour	After Session	Graded	Additional Reading
Weather-indexed insurance to help farmers adapt to climate risks (Kathryn Stahlberg, REFS/Resilience)	Single Video	30 minutes	After Session	Graded	Additional Reading
Parametric insurance for renewable energy generation (Eric Hyman)	Single Video	30 minutes	During Session	Ungraded	Additional Reading
USAID mechanisms for financing climate adaptation (Jonathan Cook, REFS/Resilience)	Single Video	1 hour			No Reading
<u>Fiscal Policies and Climate Finance (1.0 day)</u>					
Fiscal space, international and domestic debt and sovereign financing	Single Video	45 minutes	After Session	Graded	Additional Reading
Debt-for-climate swaps for distressed government debt (Bayasgalan Rentsendorj and Eric Hyman, EMD)	Single Video	1 hour	After Session	Graded	Additional Reading
Managing government planning, budgeting, procurement, emergency spending, and climate audits to address climate change (Janine Mans, DRG/GOV)	Single Video	1 hour	During Session	Graded	Additional Reading
Fossil fuel subsidy reductions (Eric Hyman and David Dod)	Single Video	1 hour	After Session	Graded	Additional Reading
Carbon taxes (Eric Hyman)	Single Video	1 hour	After Session	Graded	Additional Reading
Compliance carbon markets and carbon border adjustment mechanisms (Eric Hyman and Lex Hovani, NCS)	Single Video	1 hour	After Session	Graded	Additional Reading
Voluntary carbon markets (Eric Hyman)	Single Video	1 hour	After Session	Graded	Additional Reading
<u>Enabling Environment for Private Climate Finance (0.5 days)</u>					
Renewable energy auctions and policies for distributed energy resources (EEI/Energy and Eric Hyman)	Single Video	1 hour	After Session	Graded	Additional Reading
Decreasing regulatory burdens of emission reduction compliance (Moussa Traore)	Single Video	1 hour	During Session	Ungraded	Additional Reading
Helping nonfarm SMEs adapt to climate risks (Moussa Traore)	Single Video	1 hour	During Session	Ungraded	Additional Reading
U.S. International Development Finance Corporation: types and examples of climate financing (DFC, TBD)	Single Video	1 hour			No Reading
Millennium Challenge Corporation: types and examples of climate financing (MCC, TBD)	Single Video	1 hour			No Reading
<u>Climate Change and Economic Growth (0.5 days)</u>					
Marginal abatement cost curves (Eric Hyman)	Single Video	1 hour	After Session	Graded	Additional Reading
Macroeconomic implications of climate change mitigation part 1 (Tracy Jenkins, Mulugeta Taddele, and Eric Hyman, EMD)	Single Video	1:30 hours	After Session	Graded	Additional Reading
Macroeconomic implications of climate change mitigation part 2 (Tracy Jenkins, Mulugeta Taddele, and Eric Hyman, EMD)	Single Video	1:30 hours	After Session	Graded	Additional Reading
Macroeconomic implications of climate risks and adaptation (Tracy Jenkins, Mulugeta Taddele, and Eric Hyman, EMD)	Single Video	1:30 hours	After Session	Graded	Additional Reading

<i>Climate Change Mitigation and Trade (0.5 days)</i>					
Tariffs and trade barriers (Paul Fekete and EMD/Trade team)	Single Video	1 hour	After Session	Graded	Additional Reading
Border, transit and logistics issues affecting climate change mitigation (Paul Fekete and EMD/Trade team)	Single Video	1 hour	After Session	Graded	Additional Reading
Commodity deforestation trade restrictions (Alicia Grimes, EEI/NCS)	Single Video	1 hour	After Session	Graded	Additional Reading
Increasing supply chain sustainability (Alicia Grimes, EEI/NCS)	Single Video	1 hour	After Session	Graded	Additional Reading
<i>Illegality and Natural Resource Corruption (0.5 days)</i>					
Illegal logging and deforestation, land grabs, natural resource corruption (Alicia Grimes, EEI/NCS)	Single Video	1 hour	After Session	Graded	Additional Reading
Transnational crime costs and control measures (Brooke Sterns Lawson)	Single Video	1 hour	After Session	Graded	Additional Reading

SECTION B. DELIVERIES AND PERFORMANCE

B1. PERIOD OF PERFORMANCE

The period of performance is estimated as beginning on/around **January 2023** and end by **May 2024**. Final dates will be determined upon award and issuance of contract.

B2. LIST OF DELIVERABLES

The prospective subcontractor is responsible for the following outputs and deliverables:

Deliverable/Output	Estimated Due/Completion Date*
1. Two "pilot" MOOCs provided for initial USAID/IDG feedback and input.	21 days from contract signing
2. Two revised pilot MOOCs for final comments/input.	35 days from contract signing
3. 31 Draft MOOCs based on the 31 prioritized modules.	60 days from contract signing
4. 31 Revised Final MOOCs based on IDG/USAID comments and feedback.	90 days from contract signing

*The dates will be finalized during contract negotiations.

IDG will provide an Instructional Design Specialist that will support the MOOC developer in adapting the 31 Modules into MOOCs throughout the period of performance.

Unless specifically instructed otherwise, all materials shall be submitted electronically in PowerPoint, MS Office Word, Excel, or PDF. All deliverables are to be submitted in English. Final due dates for all deliverables will be discussed with IDG and then included in the contract.

SECTION C. PAYMENT

C.1. PAYMENT SCHEDULE

The prospective subcontractor will be paid in USD based on submission of deliverables as below:

Output	Contract Amount (%)
Deliverable 1: Two "pilot" MOOCs provided for initial USAID/IDG feedback and input.	15%
Deliverable 2: Two revised pilot MOOCs for final comments/input.	15%
Deliverable 3: 31 Draft MOOCs based on the 31 prioritized modules.	35%
Deliverable 4: 31 Revised Final MOOCs based on IDG/USAID comments and feedback.	35%

C.2. PAYMENT DETAILS

The prospective subcontractor will be responsible for any correspondent bank fees associated with transfers. The payment will be sent by IDG with funding provided by USAID.

SECTION D. PROPOSAL INSTRUCTIONS

D.1 QUESTIONS CONCERNING THE RFP

Questions regarding this opportunity must be submitted by the date and time in the cover letter to **procurement@internationaldevelopmentgroup.com**. In the subject line reference: Questions – **Developing MOOCs for the USAID-funded Climate Finance Training**.

D.2 PROPOSAL DUE DATE

Proposals, consisting of the documentation required in section B must be submitted electronically to **procurement@internationaldevelopmentgroup.com** by the date and time in the cover letter. All submitted documents must conform to the requirements outlined in the solicitation.

Documents received after the deadline will not be considered. This solicitation in no way obligates IDG or TAP EG to award a contract nor does it commit IDG or TAP EG to pay any cost incurred in the preparation and submission of a proposal.

D.3 PROPOSAL SUBMISSION INSTRUCTIONS

Offers submitted in response to this solicitation shall be in the English language. Offers received in other than English shall be rejected.

Financial offers submitted in response to this solicitation shall be denominated in USD.

Documents prepared in response to this RFP must be submitted in accordance with the instructions described below. It is up to the discretion of IDG whether late submissions will be considered. Typically, these will not be considered.

Details on the proposal instructions are as follows:

- *Volumes:* Each offeror's proposal shall be prepared as two (2) separate electronic volumes:
 - **Volume 1 – Technical Proposal (5 page limit)**
 - **Include a description of how the offeror will develop the prioritized MOOCs**
 - **Include the proposed staff that will develop the MOOCs**
 - **Include corporate capabilities of the company and a description of how it aligns with the services requested. Include 2-3 examples of prior MOOCs that bidder has developed.**
 - **Volume 2 – Cost Proposal (no page limit)**
 - Detailed Excel budget (template provided), including the detailed build-up that comprises the price for development of one MOOC and the total cost to develop all 31 MOOCs. The offeror must utilize the budget template and provide each of the detailed budgets on the respective tabs.
 - Budget Narrative
 - Evidence of Responsibility

▪ Representations and Certifications – Section 889

- *Format:* Technical proposals must be submitted in either PDF or Microsoft Word. Cost proposals must be submitted with a detailed budget in the Excel budget template provided with clear quantities and unit costs and a detailed budget narrative in PDF or Microsoft Word describing the basis of each line item proposed. All text should be Times New Roman font, in no smaller than 12-point for text and 10-point for spreadsheets, and any font size for graphics as long as they are legible.
- *Language:* Technical and cost proposals shall be submitted in English.
- *Validity:* Proposal submissions must remain valid for 60 days from the date of submission.
- *Representations and Certifications:* A completed copy of the representations and certifications must be submitted with the proposal. A copy of Section 889 Certification (Annex A) filled out by the organization must be submitted with the proposal.
- *Evidence of Responsibility:* the offeror will make an affirmative determination of responsibility and must address each element of responsibility in the template provided (Annex B).

The proposal must be emailed to procurement@internationaldevelopmentgroup.com no later than the time and date shown on the cover letter.

Note: Please make sure to type the email addresses as per instructions. It is the offeror's responsibility to verify receipt of their quote by IDG.

SECTION E. EVALUATION CRITERIA FOR AWARD

D.4 QUALIFICATIONS AND EXPERIENCE OF THE FIRM

The selected organization/consortium shall possess the following qualifications:

- Corporate experience developing MOOCs for international audiences with example links (as stated in Section D.3)
- Corporate capabilities to develop materials and communicate effectively in English
- Ability to respond quickly and integrate client comments / feedback into materials

D.5 EVALUATION CRITERIA

Proposals will be equally evaluated according to the following criteria:

- Organizational experience in developing MOOCs for international audiences.
- Demonstrated understanding of the requirements set forth in the RFP.
- Relevance and quality of proposed methodology.
- A review of the qualifications and experience of key personnel responsible for managing the project; and
- Reasonableness of the proposed costs.

D.6 CONTRACTING ELIGIBILITY

As per USAID requirements, all prospective companies wishing to submit a proposal must be owned and operated independently and may not be owned (in full or in part) or operated by any government entity. Any company or enterprise in which the government has a controlling interest is not eligible for this procurement.

ANNEX A: SECTION 889 CERTIFICATION

Section 889 Certification

DATE:

FROM:

TO: International Development Group Advisory Services, LLC

SUBJECT: Prohibition on Certain Telecommunications and Video Surveillance Services or Equipment (Section 889)

FIRM NAME certifies that it is in compliance with the below Federal Acquisition Regulations (FAR).

52.204-24 Representation Regarding Certain Telecommunications and Video Surveillance Services or Equipment (Dec 2019)

The Offeror shall not complete the representation in this provision if the Offeror has represented that it “does not provide covered telecommunications equipment or services as a part of its offered products or services to the Government in the performance of any contract, subcontract, or other contractual instrument” in the provision at [52.204-26](#), Covered Telecommunications Equipment or Services- Representation, or in paragraph (v) of the provision at [52.212-3](#), Offeror Representations and Certifications- Commercial Items.

(a) *Definitions.* As used in this provision—

“Covered telecommunications equipment or services”, “critical technology”, and “substantial or essential component” have the meanings provided in clause 52.204-25, Prohibition on Contracting for Certain Telecommunications and Video Surveillance Services or Equipment.

(b) *Prohibition.* Section 889(a)(1)(A) of the John S. McCain National Defense Authorization Act for Fiscal Year 2019 (Pub. L. 115-232) prohibits the head of an executive agency on or after August 13, 2019, from procuring or obtaining, or extending or renewing a contract to procure or obtain, any equipment, system, or service that uses covered telecommunications equipment or services as a substantial or essential component of any system, or as critical technology as part of any system. Contractors are not prohibited from providing—

(1) A service that connects to the facilities of a third-party, such as backhaul, roaming, or interconnection arrangements; or

(2) Telecommunications equipment that cannot route or redirect user data traffic or permit visibility into any user data or packets that such equipment transmits or otherwise handles.

(c) *Procedures.* The Offeror shall review the list of excluded parties in the System for Award Management (SAM) (<https://www.sam.gov>) for entities excluded from receiving federal awards for “covered telecommunications equipment or services”.

(d) *Representation.* The Offeror represents that it. _____ will, _____ will not provide covered.

telecommunications equipment or services to the Government in the performance of any contract, subcontract or other contractual instrument resulting from this solicitation.

(e) *Disclosures.* If the Offeror has represented in paragraph (d) of this provision that it “will” provide covered telecommunications equipment or services”, the Offeror shall provide the following information as part of the offer—

(1) A description of all covered telecommunications equipment and services offered (include brand; model number, such as original equipment manufacturer (OEM) number, manufacturer part number, or wholesaler number; and item description, as applicable).

(2) Explanation of the proposed use of covered telecommunications equipment and services and any factors relevant to determining if such use would be permissible under the prohibition in paragraph (b) of this provision.

(3) For services, the entity providing the covered telecommunications services (include entity name, unique entity identifier, and Commercial and Government Entity (CAGE) code, if known); and

(4) For equipment, the entity that produced the covered telecommunications equipment (include entity name, unique entity identifier, CAGE code, and whether the entity was the OEM or a distributor, if known).

The Offeror is required to inform the prime contractor within one (1) business day of identifying any covered equipment/services as required by FAR 52.204-25.

52.204-26 Covered Telecommunications Equipment or Services-Representation (Dec 2019)

(a) *Definitions.* As used in this provision, “covered telecommunications equipment or services” has the meaning provided in the clause 52.204-25, Prohibition on Contracting for Certain Telecommunications and Video Surveillance Services or Equipment.

(b) *Procedures.* The Offeror shall review the list of excluded parties in the System for Award Management (SAM) (<https://www.sam.gov>) for entities excluded from receiving federal awards for “covered telecommunications equipment or services”.

(c) *Representation.* The Offeror represents that it. _____ does, _____ does not provide covered.

telecommunications equipment or services as a part of its offered products or services to the Government in the performance of any contract, subcontract, or other contractual instrument.

The Offeror is required to inform the prime contractor within one (1) business day of identifying any covered equipment/services as required by FAR 52.204-25.

Name and Title: _____

Signature: _____ Date: _____

ANNEX B: EVIDENCE OF RESPONSIBILITY

1. Authorized Negotiators

[Names of authorized negotiators]

2. Adequate Financial Resources

[Company Name] has adequate financial resources to perform the contract, or the ability to obtain them. [expand your certification with brief supporting information, as necessary]

- a. [Please briefly describe your relationship with your bank, your line of credit, etc. this should be one sentence. Where does your working capital come from?]

3. Ability to Comply.

[Company Name] is able to comply with the required or proposed delivery or performance schedule, taking into consideration all existing commercial and governmental business commitments. [expand your certification with brief supporting information, as necessary]

- a. Briefly describe the systems your company has in place for project management, administration, financing, monitoring, and reporting. These should be a couple of sentences. Briefly describe the systems your company uses to identify and mitigate risk throughout the life of a project. Confirm that your company complies with reporting requirements.
- b. Briefly identify the number of projects completed, the amount, and whether or not there were any cost overruns, and whether task orders were completed on time.

Include a statement that the company is able to comply with the proposed delivery of performance schedule, having taken into consideration all existing business commitments, commercial as well as governmental.

4. Record of Performance, Integrity, and Business Ethics

[Company Name] has a satisfactory performance record in accordance [expand your certification with brief supporting information, as necessary]

- a. Confirm that your company has complied with contract requirements in the past adhered to contract schedules, including the administrative aspects of performance.
- b. Confirm your company's record of forecasting and controlling costs.
- c. Confirm that your principals have never been debarred or suspended.
- d. Explain how the company will work with the client to ensure work quality.

[Company Name] has a satisfactory record of integrity and business ethics. [expand your certification with brief supporting information, as necessary]

- a. Confirm that your company has never been accused of unethical business practices.
- b. Reference your completion of the Representations and Certifications document.
- c. Identify your company's code of conduct or code of ethics, and briefly describe its contents.

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

[Company Name] has the necessary organization, experience, accounting and operational controls, and technical skills, or the ability to obtain them (including, as appropriate, such elements as production control procedures, property control systems, quality assurance measures, and safety programs applicable to materials to be produced or services to be performed by the prospective contractor and subcontractors). [expand your certification with brief supporting information, as necessary]

- a. Identify the number of projects your company has completed as evidence of its experience.
- b. Reference your company's past performance record. Demonstrate that your company has the capacity in accounting and financial capacity to complete the project.
- c. Identify the type of accounting software your company uses and justify the selection of this software. Is it secure and equipped to handle government contracts?

6. Equipment and Facilities

[Company Name] has the necessary production, construction, and technical equipment and facilities, or the ability to obtain them. [expand your certification with brief supporting information, as necessary]

- a. Briefly describe your company's building and facility.
- b. Briefly describe your company's Information Technology systems including hardware, software, and internet connectivity.

7. Eligibility to Receive Award

[Company Name] is otherwise qualified and eligible to receive an award under applicable laws and regulations. [expand your certification with brief supporting information, as necessary]

- a. Recertify that neither your company nor any of your principals are presently debarred, suspended, proposed for debarment, or declared ineligible for the award of contract by any Federal agency.
- b. Certify that neither your company nor any of its principals have been convicted of or had a civil judgment rendered against them for commission of fraud, or a criminal offense in connection with obtaining, attempting to obtain, or performing a public (federal, state, or local) contractor subcontract.
- c. Confirm that neither your company nor any of its principals has been convicted of committing embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, tax evasion, or receiving stolen property, and are not presently indicted for, or otherwise criminally or civilly charged by a governmental entity with commission of any of the offenses enumerated above.

8. Cognizant Auditor

9. Organization of Firm

With the signature below, [Company Name] certifies that the above statements are accurate, complete, and current.

Signature: _____

Name: _____

Title: _____

Date: _____

ANNEX C: BUDGET TEMPLATE

See Excel file provided. Please ensure both tabs are filled out according to the instructions.