≡DAI

Fiscal and Accounting System of Tunisia (FAST)

Request For Proposals (RFP)

No. (REQ-TUN-23-0068)

Production of 7 E-Learning Courses (MOOC) to build
knowledge and skills to operate and maintain the new budgeting system of the
Tunisia government

Issue Date: October 5, 2023

WARNING: Prospective Offerors who have received this document from a source other than the (FAST project, office location and ProcurementFast@dai.com), should immediately contact ProcurementFast@dai.com and provide their name and mailing address in order that amendments to the RFP or other communications can be sent directly to them. Any prospective Offeror who fails to register their interest assumes complete responsibility in the event that they do not receive communications prior to the closing date. Any amendments to this solicitation will be issued and posted.

DAI conducts business under the strictest ethical standards to assure fairness in competition, reasonable prices and successful performance or delivery of quality goods and equipment. DAI does not tolerate corruption, bribery, collusion or conflicts of interest. Any requests for payment or favors by DAI employees should be reported as soon as possible to ethics@dai.com or by visiting www.dai.ethicspoint.com. Further, any attempts by an offeror or subcontractor to offer inducements to a DAI employee to influence a decision will not be tolerated and will be grounds for disqualification, termination and possible debarment. See provision No. 9 for more details.

Table of Contents

Synopsis of the RFP

RFP No.	REQ-TUN-23-0068
Issue Date	October 5, 2023
Title	Production of 7 E-Learning Courses (MOOC) to build knowledge and skills to operate and maintain the new budgeting system of the Tunisia government.
Issuing Office & Email/Physical Address for Submission of Proposals	Mail to: FASTprocurementinbox@dai.com DAI/FAST Project, Building Palmier du lac, 6th Floor; Feuille d'érable Avenue, Lac 2
	FASTprocurementinbox@dai.com
Deadline for Receipt of Questions	October 12, 2023 at 5pm (Tunis Time)
Deadline for Receipt of Proposals	October 26, 2023 at 2pm (Tunis Time)
Point of Contact	For Questions and clarifications: ProcurementFast@dai.com
	For Proposal submission: FASTprocurementinbox@dai.com
Anticipated Award Type	Firm Fixed Price Purchase Order
Basis for Award	An award will be made based on the Trade Off Method. The award will be issued to the responsible and reasonable offeror who provides the best value to DAI and its client using a combination of technical and cost/price factors.

Interested Offerors may obtain a full copy of the RFP which contains detailed instructions for preparation of the proposal. The RFP may be collected from the address and/or contact person above.

1. Introduction and Purpose

1.1 Purpose

DAI, the implementer of the USAID-funded Fiscal and Accounting System of Tunisia (FAST) project, invites qualified offerors to submit proposals to supply and deliver the Production of 7 E-Learning Courses (MOOC) to build knowledge and skills to operate and maintain the new budgeting system of the Tunisia government in support of program implementation.

The USAID Fiscal and Accounting System of Tunisia (FAST) Project supports the Government of Tunisia (GoT) to improve public financial management. FAST focuses on enhancing and upgrading the government's public financial management information system (PFMIS) to increase public finances' efficiency, transparency, and predictability. The project strengthens the government's capacity to carry out fiscal, budgetary, and revenue collection mandates and advances electronic services to optimize regulations, procedures, and authorizations that reduce the cost and time burden on businesses, facilitate investment and trade, and promote innovation. Finally, FAST works to strengthen communication between policymakers and the public to build a common understanding of the constraints to and opportunities for, economic expansion.

FAST plans to implement a commercial off the shelf (COTS) solution for Tunisia's public financial management information systems (PFMIS) to manage the "Medium-Term Macroeconomic and Budgetary Framework" and "Performance-Based Budgeting" processes in compliance with best practices and international standards.

Adopting and using the Comprehensive Budgeting System in the Government of Tunisia (GoT) will impact the current roles, processes, and operations of the government personnel responsible for budget preparation and management. The Project recognizes that the success of implementing this new system depends upon the stakeholders' faster adoption of the system and its functionality.

The main objective of this procurement is for FAST and the solution provider is to enhance the capacity of the Tunisian government through developing training courses and necessary learning materials to build knowledge and skills to operate and maintain the budgeting system of Tunisia. System users should be able to use the system on their own, with processes and functions becoming part of their routines, is the goal of capacity building.

The training plan was developed and will be implemented to ensure the sustainability of the budgeting solution after the FAST project is completed. Led by the provider Team, the full training program aims to achieve the following objectives:

1. To provide participants with an overview of the processes and functions of the new solution as configured for Tunisia.

2. To demonstrate the functionality, usability, and accessibility of the system.

3. To build the skills of the participants on how to access and use the system to perform their specific roles and functions.

4. To equip potential trainers with facilitation and troubleshooting skills to deliver the subsequent end-user training.

1.2 Issuing Office

The Issuing Office and Contact Person noted in the above synopsis is the sole point of contact at DAI for purposes of this RFP. Any prospective offeror who fails to register their interest with this office assumes

complete responsibility in the event that they do not receive direct communications (amendments, answers to questions, etc.) prior to the closing date.

1.3   Type of Award Anticipated

DAI anticipates awarding a Firm Fixed Price Purchase Order. This subcontract type is subject to change during the course of negotiations.

A Firm Fixed Price Purchase Order is: An award for a total firm fixed price, for values less than $150,000, for the provision of specific services, goods, or deliverables and is not adjusted if the actual costs are higher or lower than the fixed price amount. Offerors are expected to include all costs, direct and indirect, into their total proposed price.

2.   General Instructions to Offerors

2.1   General Instructions

"Offeror", "Subcontractor", and/or "Bidder" means a firm proposing the work under this RFP. "Offer" and/or "Proposal" means the package of documents the firm submits to propose the work.

Offerors wishing to respond to this RFP must submit proposals, in English, in accordance with the following instructions. Offerors are required to review all instructions and specifications contained in this RFP. Failure to do so will be at the Offeror's risk. If the solicitation is amended, then all terms and conditions not modified in the amendment shall remain unchanged.

Issuance of this RFP in no way obligates DAI to award a subcontract or purchase order. Offerors will not be reimbursed for any costs associated with the preparation or submission of their proposal. DAI shall in no case be responsible for liable for these costs.

Proposals are due no later than October 26, 2023 at 2pm (Tunis time), to be submitted via email to FASTprocurementinbox@dai.com, and the RFP number and title of the activity "**Production of 7 E-Learning Courses (MOOC) to build knowledge and skills to operate and maintain the new budgeting system of the Tunisia government**" must be stated in the subject line of the email. Cost and Technical proposals shall be submitted in separate emails. Late offers will be rejected except under extraordinary circumstances at DAI's discretion. The submission to DAI of a proposal in response to this RFP will constitute an offer and indicates the Offeror's agreement to the terms and conditions in this RFP and any attachments hereto. DAI reserves the right not to evaluate a non-responsive or incomplete proposal.

2.2   Proposal Cover Letter

A cover letter shall be included with the proposal on the Offeror's company letterhead with a duly authorized signature and company stamp/seal using Attachment B as a template for the format. The cover letter shall include the following items:

- The Offeror will certify a validity period of 60 days for the prices provided.
- Acknowledge the solicitation amendments received.

2.3   Questions regarding the RFP

Each Offeror is responsible for reading and complying with the terms and conditions of this RFP. Requests for clarification or additional information must be submitted in writing via email or in writing to the Issuing Office as specified in the Synopsis above.   No questions will be answered by phone. Any verbal information received from a DAI or (insert Project Acronym) employee or other entity shall not be considered as an official response to any question regarding this RFP.

Copies of questions and responses will be distributed in writing to all prospective bidders who are on record as having received this RFP after the submission date specified in the Synopsis above.

3. Instructions for the Preparation of Technical Proposals

Technical proposals shall be sealed in a separate envelope from cost/price proposals, and shall be clearly labeled as "VOLUME I: TECHNICAL PROPOSAL".

Technical proposals shall include the following contents

Technical proposals shall include the following contents

1. Technical Approach
   - Description of the proposed services which meets or exceeds the stated technical specifications or scope of work. The proposal must show how the Offeror plans to complete the work and describe an approach that demonstrates the achievement of timely and acceptable performance of the work.
   - A detailed implementation plan incorporating the overall workload per project phase in a Gantt Chart with a complete list of deliverables to be provided. Activity naming and reference should be unique.
   - A clear and detailed description of the methodology and approach of the project implementation to be used and a thorough proposal to achieve the priorities identified in the RFP.
2. Management approach
   - Proposed project team including solid experience for the project manager and the division of roles and responsibilities of its team members.
3. Personnel Qualifications
   - Academic and other professional qualifications, skills, relevant experience and suitability of the proposed team members.
4. Past Performance
   - Successful completion of at least three (3) software development projects with the front and back-end development tools and frameworks with similar size and complexity, as presented in the table in Attachment F. (10 points)
   - Relevant experience including pertinent references as presented in the offeror's response to bullet points in C (2) above. Response must address all the points listed in the instructions for Technical Proposals above. See Attachment F.

3.1 Services Specified
For this RFP, DAI is in need of the services described in Attachment A.

3.2 Technical Evaluation Criteria
Each proposal will be evaluated and scored against the evaluation criteria and evaluation sub-criteria, which are stated in the table below. Cost/Price proposals are not assigned points, but for overall evaluation purposes of this RFP, technical evaluation factors other than cost/price, when combined, are considered significantly more important than cost/price factors.

Evaluation Criteria	Evaluation Sub-criteria (if needed)	Maximum Points
Technical score		**100 points**
1-Technical Approach	- Description of the proposed services which meet or exceed the stated technical specifications or scope of work. (10 points)	20 points

	- A detailed implementation plan incorporating the overall workload per project phase in a Gantt Chart with a complete list of deliverables to be provided (5 points). Activities naming and reference should be unique. - A clear and detailed description of the methodology and approach of the project implementation to be used and a thorough proposal to achieve the priorities identified in the RFP. (5 points)	
2- Organizational Structure and Management Plan	- Proposed project team including solid experience for the project manager and the division of roles and responsibilities of its team members.	10 points
3- Personnel qualifications	- Academic and other professional qualifications, skills, relevant experience and suitability of the proposed team members.	40 points
4- Past Performance and Relevant Experience (to provide professional references)	- Successful completion of at least three (3) similar projects (10 points) - Relevant experience including pertinent references (10 points) - Response must address all the points listed in the instructions for Technical Proposals above. (10 points)	30 points
	Total Points	**100 points**

4. Instructions for the Preparation of Cost/Price Proposals

4.1 Cost/Price Proposals

Cost/Price proposals shall be sealed in a separate envelope from technical proposals, and shall be clearly labeled as "VOLUME II: COST/PRICE PROPOSAL".

Provided in Attachment C is a template for the Price Schedule, for firm-fixed price awards. For cost-reimbursable or time & material awards, the offeror shall provide a fully detailed budget. Offerors shall complete the template including as much detailed information as possible.

The Subcontractor is responsible for all applicable taxes and fees, as prescribed under the applicable laws for income, compensation, permits, licenses, and other taxes and fees due as required.

5. Basis of Award

5.1 Best Value Determination

DAI will review all proposals, and make an award based on the technical and cost evaluation criteria stated above, and select the offeror whose proposal provides the best value to DAI. DAI may also exclude an offer from consideration if it determines that an Offeror is "not responsible", i.e., that it does not have the management and financial capabilities required to perform the work required.

Evaluation points will not be awarded for cost. Cost will primarily be evaluated for realism and reasonableness. DAI 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.

DAI may award to an Offeror without discussions. Therefore, the initial offer **must contain the Offeror's best price and technical terms.**

5.2   Responsibility Determination

DAI will not enter into any type of agreement with an Offeror prior to ensuring the Offeror's responsibility. When assessing an Offeror's responsibility, the following factors are taken into consideration:

1. Provide evidence of the required business licenses to operate in the host country.
2. Evidence of an Unique Entity ID (SAM) (explained below and instructions contained in Attachment D).
3. The source, origin and nationality of the products or services are not from a Prohibited Country (explained below).
4. Having adequate financial resources to finance and perform the work or deliver goods or the ability to obtain financial resources without receiving advance funds from DAI.
5. Ability to comply with required or proposed delivery or performance schedules.
6. Have a satisfactory past performance record.
7. Have a satisfactory record of integrity and business ethics.
8. Have the necessary organization, experience, accounting and operational controls and technical skills.
9. Have the necessary production, construction and technical equipment and facilities if applicable.
10. Be qualified and eligible to perform work under applicable laws and regulations.

6. Anticipated post-award Deliverables

Upon award of a subcontract, the deliverables and deadlines detailed in below table will be submitted to DAI. The Offeror should detail proposed costs per deliverable in the Price Schedule. All of the deliverables must be submitted to and approved by DAI before payment will be processed.

No.	Description	Due Date
1	E-Learning Course # 1: 1. Course copies, including scripts and graphs/tables; 2. Videos and any other element which forms part of the courses. Full final and raw footage should be included. 3. All individual content material and the overall "packaging material" (SCORM or SCORM equivalent) are in final and editable versions.	Within 30 days of award
2	E-Learning Course # 2:	Within 60 days of award

No.	Description	Due Date
	1. Course copies, including scripts and graphs/tables; 2. Videos and any other element which forms part of the courses. Full final and raw footage should be included. 3. All individual content material and the overall "packaging material" (SCORM or SCORM equivalent) are in final and editable versions.	
3	E-Learning Course # 3: 1. Course copies, including scripts and graphs/tables; 2. Videos and any other element which forms part of the courses. Full final and raw footage should be included. 3. All individual content material and the overall "packaging material" (SCORM or SCORM equivalent) are in final and editable versions.	Within 90 days of award
	E-Learning Course # 4: 1. Course copies, including scripts and graphs/tables; 2. Videos and any other element which forms part of the courses. Full final and raw footage should be included. 3. All individual content material and the overall "packaging material" (SCORM or SCORM equivalent) are in final and editable versions.	Within 120 days of award
	E-Learning Course # 5: 1. Course copies, including scripts and graphs/tables; 2. Videos and any other element which forms part of the courses. Full final and raw footage should be included. 3. All individual content material and the overall "packaging material" (SCORM or	Within 150 days of the award

No.	Description	Due Date
	SCORM equivalent) are in final and editable versions.	
	E-Learning Course # 6: 1. Course copies, including scripts and graphs/tables; 2. Videos and any other element which forms part of the courses. Full final and raw footage should be included. 3. All individual content material and the overall "packaging material" (SCORM or SCORM equivalent) are in final and editable versions.	Within 180 days of the award
	E-Learning Course # 7: 1. Course copies, including scripts and graphs/tables; 2. Videos and any other element which forms part of the courses. Full final and raw footage should be included. 3. All individual content material and the overall "packaging material" (SCORM or SCORM equivalent) are in final and editable versions.	Within 210 days of the award

7. Inspection & Acceptance

The designated DAI Project Manager will inspect from time to time the services being performed to determine whether the activities are being performed in a satisfactory manner, and that all equipment or supplies are of acceptable quality and standards. The subcontractor shall be responsible for any countermeasures or corrective action, within the scope of this RFP, which may be required by the DAI Chief of Party as a result of such inspection.

8. Compliance with Terms and Conditions

8.1 General Terms and Conditions
Offerors agree to comply with the general terms and conditions for an award resulting from this RFP. The selected Offeror shall comply with all Representations and Certifications of Compliance listed in Attachment G.

8.2 Prohibited Technology
Bidders MUST NOT provide any goods and/or services that utilize telecommunications and video surveillance products from the following companies: Huawei Technologies Company, ZTE Corporation, Hytera Communications Corporation, Hangzhou Hikvision Digital Technology Company, or Dahua Technology Company, or any subsidiary or affiliate thereof, in compliance with FAR 52.204-25.

8.3   Source and Nationality

Under the authorized geographic code for its contract DAI may only procure goods and services from the following countries.

Geographic Code 937: Goods and services from the United States, the cooperating country, and

"Developing Countries" other than "Advanced Developing Countries: excluding prohibited countries. A

list of the "Developing Countries" as well as "Advanced Developing Countries" can be found at:

http://www.usaid.gov/policy/ads/300/310maa.pdf and

http://www.usaid.gov/policy/ads/300/310mab.pdf respectively.

DAI must verify the source and nationality of goods and services and ensure (to the fullest extent possible) that DAI does not procure any goods or services from prohibited countries listed by the Office of Foreign Assets Control (OFAC) as sanctioned countries. OFAC sanctioned countries may be searched within the System for Award Management (SAM) at www.SAM.gov. The current list of countries under comprehensive sanctions include: Cuba, Iran, North Korea, Sudan, and Syria. Goods may not transit through or be assembled in comprehensive sanctioned origin or nationality countries nor can the vendor be owned or controlled by a prohibited country. DAI is prohibited from facilitating any transaction by a third party if that transaction would be prohibited if performed by DAI.

By submitting a proposal in response to this RFP, Offerors confirm that they are not violating the Source and Nationality requirements of the goods or services being offered and that the goods and services comply with the Geographic Code and the exclusions for prohibited countries outlined above.

8.4   Unique Entity ID (SAM)

There is a **mandatory** requirement for your organization to provide an Unique Entity ID (SAM)to DAI. Without an Unique Entity ID (SAM), DAI cannot deem an Offeror "responsible" to conduct business with and therefore, DAI will not enter into a subcontract/purchase order or monetary agreement with any organization. The determination of a successful offeror/applicant resulting from this RFP/RFQ/RFA is contingent upon the winner providing an Unique Entity ID (SAM)to DAI. Offerors who fail to provide Unique Entity ID (SAM)will not receive an award and DAI will select an alternate Offeror.

All U.S. and foreign organizations which receive first-tier subcontracts/ purchase orders with a value of $30,000 and above **are required** to obtain an Unique Entity ID (SAM)prior to signing of the agreement. Organizations are exempt from this requirement if the gross income received from all sources in the previous tax year was under $300,000. DAI requires that Offerors sign the self-certification statement if the Offeror claims exemption for this reason.

For those required to obtain an Unique Entity ID (SAM), see Attachment D - Instructions for Obtaining an Unique Entity ID (SAM)- DAI'S Vendors, Subcontractors

For those not required to obtain an Unique Entity ID (SAM), see Attachment E: Self Certification for Exemption from Unique Entity ID (SAM)Requirement

9.   Anti-Corruption and Anti-Bribery Policy and Reporting Responsibilities

DAI conducts business under the strictest ethical standards to assure fairness in competition, reasonable prices and successful performance or delivery of quality goods and equipment. **DAI does not tolerate the following acts of corruption:**

- Any requests for a bribe, kickback, facilitation payment or gratuity in the form of payment, gift or special consideration by a DAI employee, Government official, or their representatives, to influence an award or approval decision.
- Any offer of a bribe, kickback, facilitation payment or gratuity in the form of payment, gift or special consideration by an offeror or subcontractor to influence an award or approval decision.
- Any fraud, such as mis-stating or withholding information to benefit the offeror or subcontractor.
- Any collusion or conflicts of interest in which a DAI employee, consultant, or representative has a business or personal relationship with a principal or owner of the offeror or subcontractor that may appear to unfairly favor the offeror or subcontractor. Subcontractors must also avoid collusion or conflicts of interest in their procurements from vendors. Any such relationship must be disclosed immediately to DAI management for review and appropriate action, including possible exclusion from award.

These acts of corruption are not tolerated and may result in serious consequences, including termination of the award and possible suspension and debarment by the U.S. Government, excluding the offeror or subcontractor from participating in future U.S. Government business.

Any attempted or actual corruption should be reported immediately by either the offeror, subcontractor or DAI staff to:

- Toll-free Ethics and Compliance Anonymous Hotline at (U.S.) +1-503-597-4328
- Hotline website – www.DAI.ethicspoint.com, or
- Email to Ethics@DAI.com
- USAID's Office of the Inspector General Hotline at hotline@usaid.gov.

By signing this proposal, the offeror confirms adherence to this standard and ensures that no attempts shall be made to influence DAI or Government staff through bribes, gratuities, facilitation payments, kickbacks or fraud. The offeror also acknowledges that violation of this policy may result in termination, repayment of funds disallowed by the corrupt actions and possible suspension and debarment by the U.S. Government.

10. Attachments

10.1 Attachment A: Scope of Work for Services or Technical Specifications

SCOPE OF WORK
Production of 7 E-Learning Courses (MOOC) to build.
knowledge and skills to operate and maintain the new budgeting system of the Tunisia government.

1. PROJECT BACKGROUND

1- The USAID Fiscal and Accounting System of Tunisia (FAST) Project supports the Government of Tunisia (GoT) to improve public financial management. FAST focuses on enhancing and upgrading the government's public financial management information system (PFMIS) to increase public finances' efficiency, transparency, and predictability. The project strengthens the government's capacity to carry out fiscal, budgetary, and revenue collection mandates and advances electronic services to optimize regulations, procedures, and authorizations that reduce the cost and time burden on businesses, facilitate investment and trade, and promote innovation. Finally, FAST works to strengthen communication between policymakers and the public to build a common understanding of the constraints to and opportunities for, economic expansion.

FAST plans to implement COTS public financial management information systems (PFMIS) to manage the "Medium-Term Macroeconomic and Budgetary Framework" and "Performance-Based Budgeting" processes in compliance with best practices and international standards.

2- Adopting and using the Comprehensive Budgeting System in the Government of Tunisia (GoT) will impact the current roles, processes, and operations of the government personnel responsible for budget preparation and management. The Project recognizes that the success of implementing this new system depends upon the stakeholders' faster adoption of the system and its functionality.

2. GENERAL OBJECTIVES

3- FAST and the solution provider deemed capacity building as integral to the project implementation. Training courses and the necessary learning materials are provided to build knowledge and skills to operate and maintain the system. System users' ability to use the system on their own, with processes and functions becoming part of their routines, is the goal of capacity building. It's a significant change management element to help users adopt the new solution and overcome any more resistance.

The training plan was developed and will be implemented to ensure the sustainability of the budgeting solution after the project is completed. Led by the provider Team, the full training program aims to achieve the following objectives:

1. To provide participants with an overview of the processes and functions of the new solution as configured for Tunisia.
2. To demonstrate the functionality, usability, and accessibility of the system.
3. To build the skills of the participants on how to access and use the system to perform their specific roles and functions.
4. To equip potential trainers with facilitation and troubleshooting skills to deliver the subsequent end-user training.

In this context, FAST is looking to hire a service provider who will be responsible for digitizing the training content delivered by the solution provider. E-learning courses will capitalize on the materials developed for face-to-face training, as well as on existing guides and tools, and will enable as many users of the new system to be trained according to their availability.

FAST wants to collaborate with a third-party service provider that has experience in designing, developing, and delivering e-learning courses. The supplier will be responsible for the whole creation and design of the courses, from the definition of a course outline to the creation of course contents (scripts, recording of videos, other material, animations, etc...) and the integration of the new budgeting solution's E-Learning training courses into FAST Moodle-based LMS platform the LMS platform.

The documentary basis of this work will be the training material, curriculum training courses, and user guides, which will be delivered by the solution provider for users' face-to-face training, as well as e-learning content such as videos, exercises, quizzes, etc., to support online learning.

3. SCOPE OF WORK

The service provider will develop e-learning content to be integrated into the LMS platform for the following 7 training courses (course descriptions are detailed in appendix A):

4- SOFT SKILLS
5- MACROECONOMIC FRAMEWORKS
6- BUDGET PREPARATION
7- BUDGET PERFORMANCE MONITORING
8- SYSTEM ADMINISTRATION
9- GRP APPLICATION STACK & ARCHITECTURE
10- MTFF technical training

The e-learning training will take the form of autonomous modules for each course. Each training module will contain a variety of materials (videos, quizzes, animated presentations, case studies, further reading, etc.) for participants to browse through, as well as a downloadable text summary of the module. Access to each module will be determined by completion of the previous module.

Online training will offer an interactive "self-learning" pathway comprising the modules as detailed in the course curriculum and as will be agreed in the script. These modules will be developed based on existing content and in consultation with the FAST project team.

Within this Work Package, the scope of work will comprise the following working phases:

Preliminary Knowledge Exchange Meeting

The supplier will facilitate a discussion during a Preliminary Knowledge Exchange Meeting to further define the seven courses´ outline and structure to FAST. The supplier´s academic team

will present the courses´ outline and structure and collect the feedback of FAST team. Once this preliminary knowledge exchange meeting is finalized, the supplier will send an updated course structure and outline, which will have to be validated by the FAST team. If necessary, the FAST team will send its feedback to the provider and ask for an updated version. Once an agreement on both the outline and the structure is reached, the supplier will proceed with the production of the courses´ script and planning the material used in the courses.

Development and validation of the courses´ script and related materials

The supplier will draft a first full course copy for each course, consisting of a detailed and proof-read script and information on what material will be used and how it will be used in the courses (pictures, graphs/tables, animations, /videos etc.). The FAST Team will provide its feedback to the provider and a back-and-forth will take place with the provider until an agreement is reached both on the script and the related materials which will be used in the courses.

Production of the courses

Following the validation of the courses´ scripts, the supplier will prepare and produce all the related material which will be used in the courses (pictures, graphs/tables, animations, /videos etc.).

Before proceeding with the post-production, the supplier will send the materials to the FAST Team to collect its feedback, which must be considered before producing the final versions of all course materials. This revision will be carried out as a back-and-forth until an agreement is reached.

Creation of the final version of the course and final review round

The supplier will assemble the courses´ scripts with the videos and related materials so to generate one final draft of each course. A final round of revisions will be organized with FAST Team and the supplier will be in charge of implementing the resulting changes and creating the final version of the courses.

Distribution and Formal Launch

The courses will be hosted, operated, and distributed by the supplier on the FAST LMS platform.

4. SPECIFIC REQUIREMENTS

It is important that the supplier takes into account the following for the development of the E-learning courses:

1. The total amount of time necessary to complete a course should be minimum 2,5 hours. This includes any modules or sub courses that are required for the hold course.

2. All courses should be 100% asynchronous. A learner should be capable of initiating and executing a course autonomously.

3. Each course is divided into various "learning modules" (3 to 10 in general) that form a structured course program. Each module can consist of various videos, texts, animations, quizzes. The course can be fully completed within a day, or over a few days/weeks.

4. The presentation page of the course should provide all the necessary information ("About the Course", "Target Audience", "Course Structure", etc.):

☐ The presentation page should also include a short 2–3-minute teaser video to make potential learners want to know more. Prefer provocative and engaging content/approaches to the classical approach of the Programme Director telling what his course is about.

☐ The presentation page should include:

. A series of rules and regulations (logos, banners, fonts, display, etc.) which the FAST Team will detail. All these necessary elements will be provided

☐ A section specifically detailing what the learner will be capable of doing after following the course should be included.

5. Languages: All text-based information should be in French. All speakers in the course should have a high level of French and all videos of the SFOC should be subtitled in French, even if the speaker is a fluent/native French speaker.

- **Important requisites for each learning module**
- The content provided in each learning module should be linked together by a storyline that must be engaging and pedagogically robust.
- The total amount of time necessary to complete a learning module should be between 30 minutes and 4 hours. Each module that forms part of the course should be between 3- 20 minutes, and the holding course should not be more than 4 hours, as it is stipulated in point 4, number 1, that the minimum time should be 2.5 hours.
- Each learning module should focus on addressing a specific topic of the learning curriculum. The formulation of the titles and the presentation of the chapters should be engaging to the target audience.

5. DELIVERABLES

The supplier will produce 7 E-learning courses (MOOC) on Budgeting solution. Each of them will be delivered in phases with the submission of the following components at dates that must be agreed by both parties:

1. Course copies, including scripts and graphs/tables;

2. Videos and any other element which forms part of the courses. Full final and raw footage should be included.

3. All individual content material and the overall "packaging material" (SCORM or SCORM equivalent) are in final and editable versions.

Appendix 1/
Courses Description/ Training courses curriculum

MACROECONOMIC FRAMEWORKS
Course Description
The Macroeconomic Framework Module covers all system functions and features that support the calculation of the budget cap, establishment of criteria for budget preparation, distribution

of budget ceilings, and setting up of multi-year budget plans. The system processes information from various sources to arrive at revenue projections, expenditure projections, and the imposition of state budget ceilings.

The Ministry of Finance (MoF) will be able to generate the Table of Government Financial Operations (TOFE) that will pre-set the main revenues categories and expenditures by nature and show the projected deficit for current and future three years. In this solution, the MoF could plan and analyze in advance all available resources that can be used to meet the deficit which as a result will assist the government to define and adjust their fiscal policies to strengthen the fiscal sustainability for the government.

Course Objectives

The Macroeconomic Framework Module aims to provide an integrated solution to manage the process of TOFE calculation and the establishment of fiscal frameworks including primarily the budget ceilings.

After completing the course, the participant is able to:
● Access the system
● Create versions and scenarios
● Enter data manually using the application
● Create, modify, and/or view real time data
● Import data at the aggregate level and for both; chained and actual prices
● Import data/Interface with other parties at the detailed level
● Run a simulation analysis
● Create the Macroeconomic Framework
● Create TOFE
● Create CDMT "at the budget administrative level"
● Create the Global CDMT (CBMT)
● Set up the ceilings and allocation of ceilings over missions
● Generate reports
● Appreciate automated processes and related controls

Course Contents

This training course covers the following topics:

Time Agenda Content Purpose & Description

Day 1 Submodule: Macroeconomic and Fiscal Modeling

30 mins (0.5 hrs) Preliminaries

150 mins (2.5 hrs) Supporting Entities
● Common Entities
● Variables
● Variable Groups
● Support Entities

- Discussion of concepts and processes
- Demo of the Software Application
- Hands-on Exercises
- Question and Answers

150 mins (2.5 hrs) Main Functions
- Versions
- Scenarios
- Assumptions
- Calculations
- Discussion of concepts and processes
- Demo of the Software Application
- Hands-on Exercises
- Question and Answers

60 mins (1 hr) Report Generation
- Aggregate Level
- Detailed Level
- Discussion of concepts and processes
- Demo of the Software Application
- Hands-on Exercises
- Question and Answers

30 mins (0.5 hrs) Closing Ceremonies

Day 2 Submodule: TOFE
Calculations and Versioning

30 mins (0.5 hrs) Preliminaries

150 mins (2.5 hrs) Supporting Entities
- Discussion of concepts and processes
- Demo of the Software Application
- Hands-on Exercises
- Question and Answers

150 mins (2.5 hrs) Main Functions ● Discussion of concepts and processes
- Demo of the Software Application
- Hands-on Exercises
- Question and Answers

60 mins (1 hr) Report Generation ● Discussion of concepts and processes
- Demo of the Software Application
- Hands-on Exercises
- Question and Answers

30 mins (0.5 hrs) Closing Ceremonies

Day 3 Submodule: CBMT and CDMT

30 mins (0.5 hrs) Preliminaries

150 mins (2.5 hrs) Supporting Entities

● Discussion of concepts and processes

Time Agenda Content Purpose & Description

● Demo of the Software Application

● Hands-on Exercises

● Question and Answers

60 mins (1 hr) CBMT calculations ● Discussion of concepts and processes

● Demo of the Software Application

● Hands-on Exercises

● Question and Answers

60 mins (1 hr) Development of sectoral CDMTs ● Discussion of concepts and processes

● Demo of the Software Application

● Hands-on Exercises

● Question and Answers

60 mins (1 hr) Creation and approval of Budget
Ceiling

● Discussion of concepts and processes

● Demo of the Software Application

● Hands-on Exercises

● Question and Answers

30 mins (0.5 hrs) Closing Ceremonies

Duration

3 Days

BUDGET PREPARATION

Course Description

The Budget Preparation Module is a comprehensive budget preparation, review and approval, and reporting system. It enables governments to collaboratively plan for a single year or over multiple years using an iterative budget version, scenarios, and approval approach. Once the budget preparation criteria has been set up, the budget versions are created and the budget plans contained in them will be made available to all the Budget Officers of the whole government. These officers will enter their respective budget estimates into the system until the deadline of submission of plans. Planning to Planning function is available for Budget Planners to make several versions until finalized with the completed Budget Plans.

Once the budget version/s for book printing is identified, the Budget Book Builder submodule enables the authorized users to format and layout the State Budget Book with all the necessary pages, sections, and appendices. This can be done for both draft and final versions, and printing is compatible with any modern printers.

Course Objectives

The Budget Preparation Module of the National Budgeting System aims to provide a solution to the tedious annual exercise of government-wide planning and budget preparation. It comes along with a Budget Book Builder to ease the enormous annual exercise of printing volumes of government-wide budgets with customized format and layout.

After completing the course, the participant is able to:

● Access the system

● Creating budget versions and scenarios

● Enter data manually using the application

● Create, modify, and/or view real time data

● Execute the workflow transitions

● Generate reports

● Appreciate automated processes and related controls

Target Audience

The Budget Preparation functions and features are granted to Finance Managers, Budget Officers, and Planning Officers of all government ministries, departments, and agencies.

Course Contents

This training course covers the following topics:

Time Agenda Content Purpose & Description

Day 1 Budget Planning

30 mins (0.5 hrs) Preliminaries

60 mins (1 hr) Management of Support Entities

- Planning Scenarios

- Plan Structure

- Plan Type

● Discussion of concepts and processes

● Demo of the Software Application

● Hands-on Exercises

● Question and Answers

60 mins (1 hr) Creation of Budget Version and Budget Plan

● Discussion of concepts and processes

● Demo of the Software Application

● Hands-on Exercises

● Question and Answers

150 mins (2.5 hrs) Entering budget estimates in the system

● Discussion of concepts and processes

● Demo of the Software Application

● Hands-on Exercises

● Question and Answers

60 mins (1 hr) Reviewing and Approving Budget Plans

- Discussion of concepts and processes
- Demo of the Software Application
- Hands-on Exercises
- Question and Answers

Day 2 Budget Planning

Time Agenda Content Purpose & Description

30 mins (0.5 hrs) Preliminaries

150 mins (2.5 hrs) Cost Drivers ● Discussion of concepts and processes
- Demo of the Software Application
- Hands-on Exercises
- Question and Answers

150 mins (2.5 hrs) Planning to Planning ● Discussion of concepts and processes
- Demo of the Software Application
- Hands-on Exercises
- Question and Answers

30 mins (0.5 hrs) Reviewing and Approving Budget Versions
- Discussion of concepts and processes
- Demo of the Software Application
- Hands-on Exercises
- Question and Answers

Day 3 Budget Book Builder

30 mins (0.5 hrs) Preliminaries

60 mins (1 hr) Budget Book Builder
- Configuration
- Discussion of concepts and processes
- Demo of the Software Application
- Hands-on Exercises
- Question and Answers

120 mins (2 hrs) Budget Book Builder
- Documents
- Sections
- Layout
- Discussion of concepts and processes
- Demo of the Software Application
- Hands-on Exercises
- Question and Answers

120 mins (2 hrs) Budget Book Builder
- Report Filter Criteria
- Discussion of concepts and processes
- Demo of the Software Application
- Hands-on Exercises

● Question and Answers

30 mins (0.5 hrs) Closing Ceremonies and Final Presentation

Duration

3 Days

BUDGET PERFORMANCE MONITORING

Course Description

The Budget Performance Monitoring Module empowers governments to improve results and outcomes, to achieve better results through access to data and metrics. It provides the ability to tie performance directly to financial and physical budgeting. It utilizes tools and reports, both system's standard reports and customized

reports for Tunisia to improve government results through improved planning and analysis.

Course Objectives

The Budget Performance Monitoring Module provides a solution to the periodic exercise of tracking performances,

comparing actuals with planned key performance indicators, and tying them to the government-wide collection and spending.

After completing the course, the participant is able to:

● Access the system

● Enter data manually using the application

● Create, modify, and/or view real time data

● Generate reports

● Appreciate automated processes and related controls

Target Audience

The Budget Preparation functions and features are granted to Finance Managers, Budget Officers, and Planning

Officers of all government ministries, departments, and agencies.

Course Contents

This training course covers the following topics:

Time Agenda Content Purpose & Description

Day 1

30 mins (0.5 hrs) Preliminaries

120 mins (2 hrs) Entering performance plans

- Strategies/Goals

● Discussion of concepts and processes

● Demo of the Software Application

● Hands-on Exercises

● Question and Answers

120 mins (2 hrs) Entering performance plans

- Physical performance

● Discussion of concepts and processes

● Demo of the Software Application

● Hands-on Exercises

● Question and Answers

90 mins (1.5 hrs) Entering performance plans

● Discussion of concepts and processes

Time Agenda Content Purpose & Description

- Products/KPIs ● Demo of the Software Application

● Hands-on Exercises

● Question and Answers

Day 2

30 mins (0.5 hrs) Preliminaries

120 mins (2 hrs) Monitoring performance-based budgets

● Discussion of concepts and processes

● Demo of the Software Application

● Hands-on Exercises

● Question and Answers

120 mins (2 hrs) Updating and approving actual accomplishments

● Discussion of concepts and processes

● Demo of the Software Application

● Hands-on Exercises

● Question and Answers

60 mins (1 hr) Budgetary and financial control and audit

● Discussion of concepts and processes

● Demo of the Software Application

● Hands-on Exercises

● Question and Answers

30 mins (0.5 hrs) Closing Ceremonies

Duration

2 Days

Appendix A
SYSTEM ADMINISTRATION

Course Description

The System Administration Module covers all of the features for common and support catalogs; the configurations of Chart of Accounts (CoA), workflow for the review and approval stages, and

management of user access rights; and all other security features. It allows users to maintain the required entities and manage system users.

Course Objectives

Providing solution to the tedious annual exercise of government-wide planning and preparation of budget

After completing the course, the participant is able to:

● Access the system

● Enter data manually using the application

● Create, modify, and/or view real time data

● Generate reports

● Appreciate automated processes and related controls

Target Audience

Project Management and Technical Specialists (System Administrators and Helpdesk)

Prerequisites

Experience with the installation and maintenance of enterprise systems.

Course Contents

This training course covers the following topics:

Time Agenda Content Purpose & Description

Day 1

30 mins (0.5 hrs) Preliminaries

150 mins (2.5 hrs) User Management and

Maintenance

● Discussion of concepts and processes

● Demo of the Software Application

● Hands-on Exercises

● Question and Answers

90 mins (1.5 hrs) Chart of Accounts Maintenance ● Discussion of concepts and processes

● Demo of the Software Application

● Hands-on Exercises

● Question and Answers

90 mins (1.5 hrs) Chart of Goals Maintenance ● Discussion of concepts and processes

● Demo of the Software Application

● Hands-on Exercises

● Question and Answers

Day 2

30 mins (0.5 hrs) Preliminaries

150 mins (2.5 hrs) Common and Support Entities ● Discussion of concepts and processes

● Demo of the Software Application

● Hands-on Exercises

● Question and Answers

150 mins (2.5 hrs) FreeBalance Customer Portal
● Discussion of concepts and processes
● Demo of the Software Application
● Hands-on Exercises
● Question and Answers
30 mins (0.5 hrs) Closing Ceremonies
Duration
2 Days

Appendix B
SOFT SKILLS TRAINING

Course Description

The TTT program is conducted to equip power users with the knowledge and skills required to manage and deliver an effective training session to all system end-users during the rollout and sustainability phase. The course covers adult learning principles and methodologies, facilitation techniques, instructional planning and preparation,
instructional methods and strategies, assessment and evaluation, and classroom management.

Course Objectives

At the end of the course, attendees will be able to
● understand the basics of training management;
● obtain facilitation and troubleshooting skills to deliver the end-users' training; and,
● lead the refresher courses during the sustainability period.

Target Audience

Designated Key Users

Course Contents

This training course covers the following topics:

Time Agenda Content Purpose & Description

Day 1

30 mins (0.5 hrs) Preliminaries

300 mins (5 hrs) Basic Troubleshooting
● Discussion of concepts and processes
● Demo of the Software Application
● Hands-on Exercises
● Question and Answers
30 mins (0.5 hrs) Closing Ceremonies

Day 2

30 mins (0.5 hrs) Preliminaries

Time Agenda Content Purpose & Description

300 mins (5 hrs) Facilitation Skills ● Discussion of concepts and processes
● Question and Answers
30 mins (0.5 hrs) Closing Ceremonies

Day 2

30 mins (0.5 hrs) Preliminaries
300 mins (5 hrs) Skills Demonstration ● Group Activity
● Demo of the Software Application
● Critiquing
30 mins (0.5 hrs) Closing Ceremonies
Duration
3 Days

GRP APPLICATION STACK & ARCHITECTURE
Course Description
Separate training courses would be conducted for end-users who are responsible for the technical side of the
operation and maintenance of the Government Resource Planning (GRP). This ensures that users are equipped
with the knowledge and skills to manage the day-to-day operations of the IT infrastructures and Budgeting
application.
Course Objectives
This course is designed to help attendees to understand the FreeBalance Accountability Suite to suit specific
environments and platforms.
Target Audience
System Administrator, Network Administrator, Software Developers, Technical support officers
Prerequisites
Experience with the installation and maintenance of enterprise systems.
Course Contents
This training course covers the following topics:
USAID.GOV TRAINING PLAN | **26**
Time Agenda Content Purpose & Description
Day 1
30 mins (0.5 hrs) Preliminaries
60 mins (1 hr) GRP Application Stack (Technical characteristics and product specifications)
● Discussion of concepts and processes
● Demo of the software stack, architecture and
product specification
● Question and Answers
60 mins (1 hr)
● Discussion of concepts and processes
● Demo of the Software deployment process
● Hands-on Exercises
● Question and Answers

120 minutes (2
hrs)
High availability ● Discussion of concepts and processes
● Demo of the Software high availability setup
● Hands-on Exercises
● Question and Answers
90 mins(1.5 hrs) Configuring the product and related tools
● Discussion of concepts and processes
● Demo of the configuration and related tools
● Hands-on Exercises
● Question and Answers
Day 2
30 mins (0.5 hrs) Preliminaries
240 mins (3 hrs) Deployment of fixes and Software Upgrades
● Discussion of concepts and processes
● Demo of the upgrade procedure
● Hands-on Exercises
● Question and Answers
120 mins (2 hrs) Backup/Restore procedure ● Discussion of concepts and processes
● Demo of the backup and restore procedure
● Hands-on Exercises
● Question and Answers
30 mins (0.5 hrs) Closing Ceremonies
Duration
2 Days

Appendix C
MTFF TECHNICAL TRAINING

Course Description

This course provides an in-depth view of the integration functionality with a Business Intelligence (BI) Tool found in the FreeBalance Accountability Suite architecture through the web services. It covers both the Dashboard and Interface.

The Dashboard sub module provides immediate insight into individual, departmental, or state government's performance by delivering key metrics in an attractive and intuitive visual interface based on the design and development of data analytics. The Interface submodule manages the interchange of data that will be used/reused

for the functions and features of the Macroeconomic Framework module.

Course Objectives

The MTFF tool provides a centralized solution to the tedious exercise using fragmented systems to manage the macroeconomics and fiscal frameworks for the government-wide planning and preparation of budget.

Target Audience

System Administrator, Network Administrator, Software Developers, Technical support officers and Head of IT

Prerequisites

Experience with the installation and maintenance of enterprise systems, database operations, programming skills

Course Contents

This training course covers the following topics:

Time Agenda Content Purpose & Description

30 mins (0.5 hrs) Preliminaries

30 mins (0,5 hr) Technical Characteristics and product overview

● Discussion of the concepts and the processes

● Question and Answers

30 mins (0.5 hr) Installation ● Discussion of concepts and processes

● Demo of the Software installation process

● Hands-on Exercises

● Question and Answers

60 mins (1 hr) Configuration ● Discussion of concepts and processes

● Demo of the configuration process

● Hands-on Exercises

● Question and Answers

60 mins (1 hr) Extract, Transform, Load (ETL) process

● Discussion of concepts and processes

● Demo of the ETL process

● Hands-on Exercises

Time Agenda Content Purpose & Description

● Question and Answers

60 mins (1 hr) Creating Dashboards

● Discussion of concepts and processes

● Demo of the Software Application

● Hands-on Exercises

● Question and Answers

30 mins (0.5 hr) Maintenance ● Discussion of concepts and processes

● Demo of the maintenance activities

● Hands-on Exercises

● Question and Answers

30 mins (0.5 hr) Backup and restoration

procedures

- Discussion of concepts and processes
- Demo of the backup and restoration procedure
- Hands-on Exercises
- Question and Answers

30 mins (0.5 hr) Closing Ceremonies

Duration

1 Day

10.2 Attachment B: Proposal Cover Letter

[On Firm's Letterhead]

<Insert date>

TO: Click here to enter text.

Development Alternatives, Inc.

We, the undersigned, provide the attached proposal in accordance with **RFP-**Click here to enter text.**-**Click here to enter text. issued on Click here to enter text.. Our attached proposal is for the total price of <Sum in Words ($0.00 Sum in Figures) >.

I certify a validity period of Click here to enter text. days for the prices provided in the attached Price Schedule/Bill of Quantities. Our proposal shall be binding upon us subject to the modifications resulting from any discussions.

Offeror shall verify here the items specified in this RFP document.

We understand that DAI is not bound to accept any proposal it receives.

Yours sincerely,

Authorized Signature:

Name and Title of Signatory: Click here to enter text.

Name of Firm: Click here to enter text.

Address: Click here to enter text.

Telephone: Click here to enter text.

Email: Click here to enter text.

Company Seal/Stamp:

10.3 Attachment C: Price Schedule

Item Number	Item Name	Description/Specifications	Quantity	Unit Price	Total Price
1a 1b 1c	List the items that are to be supplied				
2	Delivery Cost to Click here to enter text.			per kilometer	
3	VAT				
GRAND TOTAL IN Click here to enter text.					
GRAND TOTAL IN UNITED STATES DOLLARS					$

Delivery Period: Click here to enter text.

10.6 Attachment F: Past Performance Form

Include projects that best illustrate your work experience relevant to this RFP, sorted by decreasing order of completion date.

Projects should have been undertaken in the past three years. Projects undertaken in the past six years may be taken into consideration at the discretion of the evaluation committee.

#	Project Title	Description of Activities	Location Province/ District	Client Name/Tel No	Cost in US$	Start-End Dates	Completed on schedule (Yes/No)	Completion Letter Received? (Yes/No)	Type of Agreement, Subcontract, Grant, PO (fixed price, cost reimbursable)
1									
2									
3									
4									
5									

10.7 Attachment G: Representations and Certifications of Compliance

1. Federal Excluded Parties List - The Bidder Select is not presently debarred, suspended, or determined ineligible for an award of a contract by any Federal agency.

2. Executive Compensation Certification- FAR 52.204-10 requires DAI, as prime contractor of U.S. federal government contracts, to report compensation levels of the five most highly compensated subcontractor executives to the Federal Funding Accountability and Transparency Act Sub-Award Report System (FSRS)

3. Executive Order on Terrorism Financing- The Contractor is reminded that U.S. Executive Orders and U.S. law prohibits transactions with, and the provision of resources and support to, individuals and organizations associated with terrorism. It is the legal responsibility of the Contractor/Recipient to ensure compliance with these Executive Orders and laws. Recipients may not engage with, or provide resources or support to, individuals and organizations associated with terrorism. No support or resources may be provided to individuals or entities that appear on the Specially Designated Nationals and Blocked persons List maintained by the US Treasury (online at www.SAM.gov) or the United Nations Security Designation List (online at: http://www.un.org/sc/committees/1267/aq_sanctions_list.shtml). This provision must be included in all subcontracts/sub awards issued under this Contract.

4. Trafficking of Persons – The Contractor may not traffic in persons (as defined in the Protocol to Prevent, Suppress, and Punish Trafficking of persons, especially Women and Children, supplementing the UN Convention against Transnational Organized Crime), procure commercial sex, and use forced labor during the period of this award.

5. Certification and Disclosure Regarding Payment to Influence Certain Federal Transactions – The Bidder certifies that it currently is and will remain in compliance with FAR 52.203-11, Certification and Disclosure Regarding Payment to Influence Certain Federal Transactions.

6. Organizational Conflict of Interest – The Bidder certifies that will comply FAR Part 9.5, Organizational Conflict of Interest. The Bidder certifies that is not aware of any information bearing on the existence of any potential organizational conflict of interest. The Bidder further certifies that if the Bidder becomes aware of information bearing on whether a potential conflict may exist, that Bidder shall immediately provide DAII with a disclosure statement describing this information.

7. Prohibition of Segregated Facilities - The Bidder certifies that it is compliant with FAR 52.222-21, Prohibition of Segregated Facilities.

8. Equal Opportunity – The Bidder certifies that it does not discriminate against any employee or applicant for employment because of age, sex, religion, handicap, race, creed, color or national origin.

9. Labor Laws – The Bidder certifies that it is in compliance with all labor laws.

10. Federal Acquisition Regulation (FAR) – The Bidder certifies that it is familiar with the Federal Acquisition Regulation (FAR) and is in not in violation of any certifications required in the applicable clauses of the FAR, including but not limited to certifications regarding lobbying, kickbacks, equal employment opportunity, affirmation action, and payments to influence Federal transactions.

11. Employee Compliance – The Bidder warrants that it will require all employees, entities and individuals providing services in connection with the performance of an DAI Purchase Order to comply with the provisions of the resulting Purchase Order and with all Federal, State, and local laws and regulations in connection with the work associated therein.

By submitting a proposal, offerors agree to fully comply with the terms and conditions above and all applicable U.S. federal government clauses included herein, and will be asked to sign these Representations and Certifications upon award.

List of Optional Attachments

10.8 Attachment H: Branding and Marking Plan

Note: This is not required as part of the proposal. It is included as information for the Offeror. Upon subcontract award, this will be the first deliverable due.

Appendix N: Marking Plan

Sub Project Number and Name:_____

Name of Implementing Partner:_____

Name and Title of Partner's Agent:_____

Name and Title of DAI Project Manager:_____

Instructions: This form has been created to provide implementing partners (subcontractors and grantees) and DAI Project Managers with a summary of marking requirements found in the Project's Branding Implementation Plan (BIP). This form must be completed by the DAI Project Manager in conjunction with the agent of the implementing partner. Once completed, the Project Manager must upload the form to TAMIS.

Subproject Activities

Provide a short summary of the activities to be completed including the project location. For example, what materials or equipment will be purchased? What events will take place?

Include 2-3 sentence summary here:

Please place an "X" below for each activity that will take place as part of this Sub project. The implementing partner will be responsible for ensuring the Marking noted in the table below is implemented according to standards and templates provided.

	Activity/Documents	Required Marking
	Activities	

	Activity/Documents	Required Marking
	Documents	
	Reports	
	Certificates (training or other)	
	Invitations	
	Other (please describe)	

Co- Branding and Co-Marking:

DAI logo must not appear on any USAID funded programmatic material.

Requests for Exceptions or Waivers of Marking Requirements – If you do not feel it is possible to mark one or more of the items or events listed above, please describe below (1) what marking you want to be exempt from (2) how the activity or item meets the requirement for an exception or waiver.

Include full detailed justification here:

10.9 **Attachment I: Full Terms of Contract**

10.10 Attachment J: Proposal Checklist

Offeror: _____

Have you?

☐ Submitted your proposal to DAI in a sealed envelope to the address (electronic or mailing) as specified in General Instructions above?

Does your proposal include the following?

☐ Signed Cover Letter *(use template in Attachment B)*

☐ Separate Technical and Cost proposals individually sealed and labeled as Volume I and Volume II respectfully.

☐ Proposal of the Product or Service that meets the technical requirements as per Attachment A

☐ Response to each of the evaluation criteria

☐ Documents use to determine Responsibility

☐ Evidence of an Unique Entity ID (SAM)OR Self Certification for Exemption from Unique Entity ID (SAM)Requirement

☐ Past Performance *(use template in Attachment F)*

☐

☐