



Issuance Date: March 14, 2008
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Closing Time: 11:00 AM, EST

SUBJECT: RFTOP UNDER Project SEARCH – Supporting Evaluation and Research to Combat HIV/AIDS IQC
TASK ORDER FOR SERVICES: “Orphans and Vulnerable Children (OVC) Operations Research”

Reference: IQC Contract Nos.: GHH-I-00-07-00023-00 Trustees of Boston University,
GHH-I-00-07-00028-00 Family Health International,
GHH-I-00-07-00029-00 Futures Group International, LLC
GHH-I-00-07-00032-00 Johns Hopkins University,
GHH-I-00-07-00034-00 Population Council.

Dear Project SEARCH Contractors:

The U.S. Agency for International Development (USAID) is soliciting proposals from contractors under the Project SEARCH – Supporting Evaluation and Research to Combat HIV/AIDS IQCs as described in this Request for Task Order Proposal (RFTOP).

USAID anticipates awarding a three-year Cost-Plus-Fixed Fee Task Order (CPFF TO) under the referenced IQC for the “Orphans and Vulnerable Children (OVC) Operations Research” project. A single award is contemplated. The fair opportunity procedures utilized are in accordance with Section F.6 in the referenced IQCs.

Questions regarding this RFTOP are due no later than **March 21, 2008 at 5:00 PM, EST** and shall be submitted by e-mail to Nataliya A. Holl (nholl@usaid.gov) and Keisha Foster (kfoster@usaid.gov).

Proposals are due no later than **April 4, 2008 at 11:00 AM EST** and shall be delivered to the following addressee. Proposals received after this deadline **will not be considered**. Proposals should be submitted in sealed envelopes with the name and address of the contractor and the number of the RFTOP on the envelope; telegraphic or fax applications are not authorized for this RFTOP and will not be accepted.

Note: Couriers must enter the building using the 14th Street entrance. At the guard/reception desk dial x2-1787 or x2-1132.

Nataliya A. Holl
Contract Specialist
USAID/M/OAA/GH/OHA

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Issuance of this RFTOP does not constitute an award commitment on the part of the U.S. Government nor does it commit the U.S. Government to pay for costs incurred in the preparation and submission of proposals. Further, the US Government reserves the right to reject any or all proposals received.

In addition, USAID cannot award the TO contemplated by this RFTOP until funds have been appropriated, allocated and committed through internal USAID procedures. While it is anticipated that these procedures will be successfully completed, potential contractors are hereby notified of these requirements and conditions for the award. Contractors therefore submit proposals at their own risk.

Thank you for your consideration of this USAID initiative. We look forward to your organization's participation.

Sincerely,

Lisa M. Bilder
Contracting Officer
USAID/M/OAA/GH/OHA

Project SEARCH Request for Task Order Proposal

Orphans and Vulnerable Children (OVC) Operations Research Project

I. PURPOSE

The Office of HIV/AIDS of the USAID Bureau for Global Health (USAID/GH/OHA) issues this Request for Task Order Proposals (RFTOP) for the Orphans and Vulnerable Children (OVC) Operations Research Program under the Project SEARCH Indefinite Quantity Contract (IQC). “Supporting Evaluation and Research to Combat HIV/AIDS” (Project SEARCH) IQC was issued to five organizations to support HIV/AIDS research and evaluation in developing countries. The awardees are Boston University, Family Health International, Futures Group International, Johns Hopkins University, and Population Council.

The purpose of this Task Order is to improve coverage and quality of Orphans and Vulnerable Children programs in developing countries through applied program research. The successful offeror will conduct formative assessments, operations research, and program-linked evaluations to address gaps in OVC programming knowledge and increase the evidence-base for improving and scaling up promising OVC program models. The successful offeror will advance understanding of OVC issues at a global level and address country- and context-specific needs. The task order period of performance will be 36 months from the date of award.

II. GOALS AND OBJECTIVES

A. Goals

1. To fill critical gaps in the OVC research evidence base in order to guide cost-effective programming of OVC resources.
2. To guide alignment of OVC programs to complement national-level responses, frameworks, and Plans of Action for OVC.
3. To identify strategies and approaches that will improve the coverage, quality, effectiveness, and impact of OVC programs.

B. Objectives

1. To conduct formative research, needs assessment, and data analysis in order to inform OVC strategies and programming
2. To test and compare existing and new OVC program models and service delivery approaches to identify promising practices for adaptation and scale up in resource poor settings
3. To conduct evaluative studies on the effectiveness, feasibility and sustainability of program interventions for OVC in developing countries
4. To assess the quality and acceptability, cost-effectiveness, and impact of different models of services for OVC programs

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5. To document and disseminate promising models and best practices (knowledge management) for OVC program services and promote utilization of results in resource poor settings

III. BACKGROUND

A. Introduction

The USAID Bureau for Global Health (GH), Office of HIV/AIDS (OHA) requests task order proposals under the SEARCH IQC (Project SEARCH). This task order is designed in support of the Global Health Bureau (GH) Strategic Objective # 4 (SO4)- “Increased use of improved, effective and sustainable responses to reduce HIV transmission and to mitigate the impact of the HIV/AIDS pandemic.” The goals of this task order is consistent with the principles outlined in the USAID/UNICEF/UNAIDS joint report, *Children on the Brink* (http://data.unaids.org/Topics/Young-People/childrenonthebrink_en.pdf). The overall objective of the task order is to improve coverage and quality of OVC program services through applied/operations research. The focus of this task order will be to advance OVC operations research, formative assessments, and program-linked evaluations in developing countries with an aim to provide the tools and evidence base to design and implement effective OVC interventions for programmatic scale-up and quality improvement. This contract will be a Cost-Plus-Fixed-Fee (CPFF) three-year task order with a two-year extension option to be exercised at the discretion of USAID, and will be managed out of the Technical Leadership and Research Division of USAID’s Office of HIV/AIDS. The task order will include centrally-supported activities to advance global technical leadership in OVC research and evaluation. Missions can access technical services for country-specific research and evaluation needs through the task order via field support funding mechanism.

The task order’s contractor will collaborate with other Washington-based OHA and GH technical assistance instruments (e.g., AIDSTAR IQC) and with other USG OVC implementation mechanisms at the country level. Where appropriate, and particularly for the development of evaluation protocols and the testing of innovative models, close collaboration with a broad range of PEPFAR OVC and other implementing partners, other donors and researchers, local and international NGOs, host country governments, multilateral agencies, and other agencies is expected. Thus, findings and publications produced under this task order reflect a holistic approach to advancing the field of OVC research and state-of-the-art programming. Applicants should work closely with in-country OVC staff, working on PEPFAR and “*Assistance for Orphans and Other Vulnerable Children in Developing Countries Act of 2005*” PL 109-95, and coordinate with other major donors in-country such as UNICEF, Global Fund, World Bank and other OVC grant recipients in identifying program issues, implementing research, leveraging opportunities, avoiding duplication of efforts, and facilitating research capacity building and utilization of research results.

B. Task Order Background

Globally, an estimated 143 million children in developing countries have lost one or both parents due to AIDS and other causes (http://www.unicef.org/publications/files/cob_layout6-013.pdf),

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and an even greater number of children are highly vulnerable to multiple causes. Orphans and vulnerable children are at an increased risk for HIV infection, psychological distress, malnutrition economic hardships, exploitation, trafficking, and other vulnerabilities. In particular, girls in resource poor settings often face increased vulnerability.

Supporting OVC is a major priority of the U.S. Government and USAID is the lead US agency in strengthening interventions to help families, communities and governments care for children (http://pdf.usaid.gov/pdf_docs/PDACK053.pdf). Key interventions include caregiver training, support for access to education, economic support, targeted food and nutritional support, legal aid, health care, psychological and emotional care, and other social and material support. Strengthening child protection programs is a key component of the USG response to OVC and often includes protecting children from stigma, social neglect, abuse, exploitation and trafficking, preserving family structures and supporting siblings in child-headed households to stay together and to maintain their property and inheritance rights ([http://www.unicef.org/publications/files/Enhanced Protection to Children Affected by AIDS.pdf](http://www.unicef.org/publications/files/Enhanced_Protection_to_Children_Affected_by_AIDS.pdf)).

In 2003, the President’s Emergency Plan for AIDS Relief (PEPFAR) committed unprecedented resources to the prevention, care and treatment of HIV and AIDS, including care for orphans and vulnerable children. The PEPFAR *Strategy* (<http://www.pepfar.gov/guidance/78217.htm>) identifies several goals for developing OVC programs including: rapidly scaling up compassionate care for OVC; building capacity for long-term sustainability of care; advancing policy initiatives with direct outcomes that support OVC care; and collecting strategic information to monitor and evaluate progress.

In addition to increased support for children affected by HIV/AIDS, in 2005, President Bush signed into law the “*Assistance for Orphans and Other Vulnerable Children in Developing Countries Act of 2005*” (<http://www.whitehouse.gov/news/releases/2005/11/20051108-9.html>) emphasizing the need to support vulnerable children due not only to HIV/AIDS but also to all causes including war and conflict, abuse, disaster, trafficking, disability and other vulnerabilities. As per the provisions under PL 109-95, USG is improving coordination across government agencies working with vulnerable children, strengthening linkages with non-USG partners and donors, including public and private partnerships. Some of the key components of PL 109-95 include: (a) strengthening coordination and programming efforts for vulnerable children at the country level; (b) working to improve targeting and programming of resources for vulnerable children and track assistance provided through comprehensive monitoring and evaluation; and (c) compiling a collection of best practices around OVC programming.

Both the President’s Emergency Plan’s Orphans and Other Vulnerable Children Programming Guidance (<http://www.pepfar.gov/documents/organization/83298.pdf>) for United States Government In-Country Staff and Implementing Partners and Public Law 109-95, support the following five globally accepted strategies from the “*Framework for the Protection and Support of Orphans and Vulnerable Children Living in a World with HIV and AIDS*” (http://www.unicef.org/aids/files/Framework_English.pdf).

Framework Strategy 1

Strengthening the capacity of families to protect and care for orphans and vulnerable children. The USG supports a community-based response to meet the needs of orphans and vulnerable children, one that preserves and supports families and communities to care for their children in community settings.

Framework Strategy 2

Mobilizing and supporting community-based responses. A family-centered approach to prevention, treatment, and care relies upon functioning referral systems

Framework Strategy 3

Ensuring access for orphans and vulnerable children to essential services such as food and nutritional support, education.

Framework Strategy 4

Ensuring that governments protect the most vulnerable children through improved policy and legislation and by channeling resources to families and communities. National governments have the responsibility, but not always the capacity, to establish a national framework and enabling environment for action to promote the safety, well-being, and development of all children, especially those who are vulnerable. They are responsible for providing child protection and other services as well as fostering a planning and policy environment that facilitates effective action by civil society actors. Governments have the responsibility to oversee an effective national process of: (1) situation analysis, (2) development of a national plan of action, (3) development of relevant policies, (4) establishment of a mechanism for coordination among all relevant actors in implementing the national plan of action, and (5) monitoring progress of the national plan in achieving its objectives. Because some governments lack the capacity to fulfill these responsibilities adequately, action is often needed to strengthen their capacities and assist in the development and monitoring of a national framework and process for action involving all key stakeholders.

Framework Strategy 5.

Raising Awareness at all levels through advocacy and social mobilization to create a supportive environment. The attitudes and responses of society at large towards orphans and other vulnerable children have a significant impact on the safety and well-being of those children. Stigma related to HIV/AIDS or other factors can have a strong negative impact. Action is needed to promote supportive, compassionate responses to orphans and vulnerable children by society generally.

Most orphans and vulnerable children interventions fall under one or more of the above strategies, therefore research and evaluation activities conducted under this Task Order will connect to the overall framework or one of its specific strategies. While there are examples of promising practices that support these strategies, quantitative data and documentation of how OVC programs are working, including successful implementation processes, outcomes and impact are often lacking.

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Key OVC programming challenges in developing countries include varying situations at the country level both in terms of level and intensity of the problem and host country capacity and commitment to addressing the needs of OVC. Additionally, barriers to implementation of policies for sound OVC programming complicate the response. For example, despite the generally accepted OVC programming policy of supporting community-based response for children, with institutionalization as a “last resort,” some countries have recently seen a proliferation of institutional care. Another key challenge is the range of monitoring and evaluation tools and systems in different countries and among implementation partners, and the lack of implementation and evaluation research around specific programs. These discrepancies make it difficult to determine the extent to which the programs are effective and if specific program models can be replicated or scaled up.

In summary, USAID’s interest in the evolving field of OVC program research has the objective to address these and other challenges to OVC service delivery and, thus, improve the quality, coverage and effectiveness of OVC programs in developing countries.

C. Period of Performance

The period of performance for this task order is three (3) years, from the date of the award, subject to the contractor’s performance and availability of funds. Core task order activity funds are contingent upon the availability of funding through the USAID Bureau of Global Health/Office of HIV/AIDS and field support funds upon availability of funding through the Field Missions.

D. Geographic Coverage

The OVC Operations Research Project will be available to work in both Emergency Plan focus and other bilateral countries. Where the project will work depends in large part on Mission demand and funding availability, as country participation is entirely voluntary. Table 1 provides an illustrative list of potential countries where the task order activities are likely to be implemented (although the scope will not be limited to these countries).

Table 1: List of Potential Countries

Africa	ANE	E&E	LAC
Angola, Botswana, Cote d’Ivoire*, Ethiopia, DRC*, Ghana, Kenya, Lesotho, Malawi, Mozambique, Namibia, Nigeria, Rwanda, South Africa*, Sudan, Swaziland, Tanzania, Uganda*, Zambia*, Zimbabwe	China Cambodia India Indonesia Thailand Vietnam	Russia Ukraine	Dominican Republic Guyana Haiti*

* For the following countries: 1) Cote d’Ivoire 2) DRC 3) South Africa 4) Uganda 5) Zambia and 6) Haiti, the level of field support funding provided by USAID overseas missions **should not** exceed \$500,000 per year.

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E. Funding

For the three-year period of performance approximately 20 percent of task order activities will be funded by core (USAID/Washington) funds and 80 percent will be funded by field (USAID/Missions) support, subject to availability of funds.

In general, the OVC Operations Research Project will be field oriented, with most of its funding and efforts geared to country- or region-specific activities. Core funds from the Bureau for Global Health/Office of HIV/AIDS will support the Bureau’s key technical leadership functions of OVC program research and assessments, and technical support to the field as they apply to the task order’s mandate. Activities supporting the field task order objectives will be supported by corresponding USAID Overseas Missions.

F. Geographic Code

The authorized geographic code for procurement of goods and services under this award is 935.

G. Branding

The Contractor is expected to follow USAID guidelines on USAID branding which is outlined in the USAID “Graphic Standards Manual” and available on the USAID website at: www.usaid.gov/branding and revised and expanded ADS chapter 320 on Branding and Marking issues.

H. Subcontracts and Grants

Small subcontracts are allowed and encouraged in order to complete the proposed in-country work. USAID anticipates obtaining the authority to authorize a limited number of small grants under contract for this task order in accordance with Section C.3 (c) of the IQC. In conjunction with this requirement, the contractor must submit a small grants management plan within 30 days of the task order award date.

The Head of the Contracting Activity (HCA) for the ordering activity must provide written approval to allow task orders for a USAID-direct contractor to execute grants up to \$100,000 (unless a deviation is obtained to have this threshold increased) with US organizations (not-for-profits or for-profits), providing conditions in ADS 302.3.4.8 are met. For non-US organizations here is no ceiling unless a fixed obligation grant is executed in which case the ceiling is \$100,000.

If not provided by USAID, the contractor shall develop grants formats and provide a field grant guide that adheres to USAID regulations (including selection criteria, competition, cognizant Contracting Officer approvals, etc.). If the grants formats and field guide are not provided before award to the Contracting Officer, the contractor shall obtain approval from the Contracting Officer within (fill in) days after award.

The contractor shall comply with all USAID policies, procedures, regulations, and provisions set forth in the contract and ensure

- (1) sufficient time to complete grantee audits,
- (2) sufficient time for the grantee to submit a final report to the contractor, and

(3) sufficient time for the contractor to complete its review of the grantee and provide a final report to the government before contract or task order close-out. All grants must be closed out no later than the end date of the task order.

IV. STATEMENT OF WORK

Timely collection, analysis and use of evidence-based research is crucial for planning, implementing, monitoring, and evaluating OVC programs, and operations research and targeted evaluations can identify sound practices and determine which methods of service delivery are most cost-effective and of highest quality. The OVC Operations Research Project task order seeks to address critical gaps in the OVC research evidence base with the intent to use research findings to most effectively guide PEPFAR and other USG OVC resources, leverage and complement existing research resources, and improve effectiveness and scale of OVC programs.

A. Key Approaches and Methodologies

The successful offeror will demonstrate the capacity to provide global technical capacity and leadership in advancing the field of OVC applied program research and evaluation while also responding to country-specific and context-relevant requests.

Applicants are requested to describe multiple strategies and approaches to fulfill the task order’s objectives as they relate to the five strategies in the framework for the Protection and Support of Orphans and Vulnerable Children. The methodologies and approaches must describe at minimum, but not be limited to the categories listed below. Although the methodologies are categorized into distinct groups below, applicants should understand that many activities, both to advance global technical leadership as well as to meet country-level needs, may include a mix of methodologies and an overlap of strategies and approaches described below:

1. Strategies and approaches to developing or validating tools and identifying best practices in order to improve quality, coverage, and effectiveness of OVC programs in multiple countries and contexts.
2. Methodologies and approaches to developing and conducting evaluative studies to document how programs are working, including successful processes, outcomes, and impact of OVC programs.
3. Strategies and approaches to comparing OVC program delivery models, including impact, cost-effectiveness, quality, acceptability, feasibility, sustainability.
4. Approaches to formative research, assessments, data analyses, and policy analysis in order to inform OVC strategies and programming.
5. Strategies and approaches for knowledge management of emerging evidence base on promising approaches and best practices to deliver program services to OVC and improved utilization of applied research results.

Please see Appendix 1 for an illustrative list of activities under each approach.

B. Archive Maintenance

The successful offeror will maintain an archive in electronic form of all technical reports prepared under this task order. In addition, the offeror will provide project findings, recommendations, tools, and reports in electronic format to be placed at the Project SEARCH IQC knowledge management website.

C. Publications

The successful offeror of this project will be expected to produce and disseminate a number of project-related publications. The publications should address and include knowledge and experiences to improve from the OVC evaluative studies, assessments, research, comparison of existing and new program models, promising practices and results.

V. ANTICIPATED RESULTS AND PROPOSED INDICATORS

A. Results

USAID/GH Strategic Objective # 4 (SO4) strives to improve the availability, quality and use of key HIV/AIDS interventions. The overall strategic objective of this task order is to improve coverage and quality of OVC program services in developing countries through applied OVC program research. This OVC operations research task order is designed to meet the core technical leadership needs as well as the needs of the field missions in the area of applied OVC research. Therefore, results should be achieved at two levels:

1. Advancing the global methodological and evidence base of OVC applied research.

Results will include:

- Contributions to the peer-reviewed literature on applied OVC program research and emerging best practices
- Development, improvement and validation of tools and protocols (e.g., the Child Status Index) for application in multiple countries
- Development and refinement of input, outcome and impact measures at various levels (e.g., child, family, community)
- Identification and dissemination of best practices in OVC programs and interventions, including mechanisms for information exchange, collaboration, and utilization of applied research results

2. Advancing country-level capacity and understanding of OVC issues. Achieving results at this level will occur in response to performing tasks requested by specific Missions.

Illustrative results will likely include:

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- Formative assessment/situation analysis reports to help establish a framework for OVC policy and program planning
- Process, output, and outcome evaluations of specific programs and strategies to address OVC
- Recommendations for prioritization of interventions and approaches based on data synthesis and analysis, and consideration of local context.
- Assessments and qualitative research reports to inform current program targeting and future programming design.

B. Indicators

The OVC Operations Research Project task order will be funded with HIV/AIDS funds. The HIV/AIDS funds are subject to the Emergency Plan requirements, thus the successful applicant will, at a minimum, report on all relevant PEPFAR indicators. The current minimum PEPFAR indicators for OVC are:

- 1) Number of OVC served by OVC programs (taking into account measures of quality, context-specific child-appropriate services)
- 2) Number of providers/caregivers trained in caring for OVC
- 3) Number of OVC receiving food and nutritional supplementation through OVC programs

Please refer to the *Orphans and Other Vulnerable Children Programming Guidance for United States Government In-Country Staff and Implementing Partners* (<http://www.pepfar.gov/pepfar/guidance/78161.htm>) for additional information on the indicators above. As activities conducted under this task order will be primarily geared to country-level OVC programs, offerors are encouraged to propose and measure additional indicators, specific to the selected methodologies and approaches, for more detailed program monitoring and reporting.

Illustrative process indicators:

- 1) Components of promising program models and approaches reviewed and evaluated
- 2) Various evaluation modalities considered or developed

Additional illustrative output indicators may include:

- 1) Number of local investigators trained
- 2) Number of promising/best practices identified and disseminated
- 3) Number of programs evaluated through a process, output, or outcome evaluation
- 4) Number of tools or protocols developed/tested/validated/applied
- 5) Number of peer-reviewed publications produced
- 6) Number of research dissemination meetings/consultations held

VI. DELIVERABLES AND PROGRAM MEASURES

A. Project Deliverables

The OVC Operations Research Project Task Order deliverables will include:

- A compendium of promising practices and findings from all research studies and evaluations, with periodic dissemination of findings in interim reports, at a frequency to be determined in consultation with the CTO.
- An analysis of the replicability, feasibility, scale up and sustainability of promising program models.
- A final Task Order report, highlighting achievements with reference to established work plans and objectives and discussion of challenges.
- Submission of findings to peer-reviewed journals.
- A meeting/consultation in Washington for USG OVC staff and key OVC stakeholders, presenting key findings from specific task categories and widely disseminating findings in a promising practices report.
- Country-specific reports based on requirements of specific activities requested by the field.

All products and deliverables will be in the public domain. The contractor will not have copyright on these products.

B. Monitoring and Evaluation

According to PEPFAR’s Monitoring and Evaluation (M&E) requirements, offerors should propose a monitoring and evaluation plan for assessing progress towards annual and end of strategy targets per determined indicators. Offerors shall include a plan for effective utilization of core funds with indicators to measure effectiveness of core funded activities. The plan will identify the source and frequency of data to ensure USAID has data available for the Annual Report and other reporting requirements. The plan should also describe how the offeror will assess and guarantee data quality and accuracy. In addition, the offeror should be able to provide data in the format and timing required for USAID.

For any public health evaluations conducted under this task order, prior to implementation, the evaluation protocols (design, methods, human subjects procedures) will be reviewed and cleared by the CTO in consultation with the PEPFAR Public Health Evaluation (PHE) Subcommittee.

C. Periodic Reporting

Reports include annual work plans, semi-annual and annual reports, and quarterly financial reports. A final report that synthesizes the work, deliverables and results of the project over the entire Task Order duration will be due after the Task Order ends. In addition to regularly scheduled meetings with the Task Order CTO, the offeror should provide regular, informal

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briefings to USG Washington and USG in-country contacts on the principal activities and accomplishments throughout the implementation period.

The applicant will be required to submit the following periodic reports:

1) Annual Work Plan and projected expenditures (two hard copies, 1 electronic copy and 1 CD): The offeror should include in the proposal a work plan for the first year of implementation. The plan should include a rapid start up. Within 60 days after the award of the Task Order, the Applicant will submit a final work plan and projected expenditures broken down by quarter for the first year.

The first work plan to be submitted will not necessarily be for a full year or may be for more than a full year, depending upon the start date of the task order. The exact length of the first work plan will be determined in consultation with the CTO. The implementer will follow the work plan year of July 1st to June 30th, unless specifically changed by the CTO in writing. Each year, a draft of the work plan will be submitted to the CTO in March. The implementer will incorporate revisions to the draft work plan based upon the recommendations generated during the review process and submit a final work plan to the CTO for approval by June 1st

2) Monitoring and Evaluation Plan (one hard copy, 1 electronic copy and 1 CD): The applicant will submit a final monitoring and evaluation plan within 60 days after the award of the Task Order.

3) Quarterly Progress Reports (two hard copies, 1 electronic copy and 1 CD): The applicant will provide quarterly reports. The report should cover all activities proposed in the work plan and should report on progress made and on plans for the next reporting period. The quarterly progress reports shall contain the following information at a minimum:

- a) A summary of activities undertaken under the task order, progress made, results achieved and trends noticed during the reporting period;
- b) Data on all indicators established in the monitoring and evaluation plan for the core and field activities;
- c) A comparison of actual accomplishments with the goals and objectives established for the period, the findings of the investigators or both;
- d) An explanation of problems encountered, reasons why established goals were not met, if appropriate, and how challenges or problems will be overcome during the next reporting period;
- e) A comparison of actual expenditures with budget estimates, including analysis and explanation of high unit costs, and any other pertinent information;
- f) Priorities and schedule for programming during the next reporting period.

The reports should include financial reports that should contain, at a minimum, the following: a) total funds awarded to date by USAID into the task order; b) total funds previously reported as expended by contractor by major and sub-major line items; c) total funds expended in the current

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quarter by major line items; d) total un-liquidated obligations by major line items; and e) un-obligated balance of USAID funds; and e) proposed expenditures for the next quarter.

4. Final Report (three hard copies, 1 electronic copy and 1 CD):

The final report should highlight accomplishments against annual work plans and provide the final status of Benchmarks and Tangible Results. The report should include: an executive summary of the project’s accomplishments in achieving results and conclusions about areas in need of future assistance; an overall description of the project’s activities and attainment of results by country or region, as appropriate; an assessment of progress made toward accomplishing the Main Objectives and Expected Results; significance of these activities; important OVC research evidence findings; comments and recommendations; address lessons learned, best practices, comments and other findings during implementation; suggest ways to resolve constraints identified and a fiscal report that describes how the funds were used. The report should also include an annex of lessons learned and recommendations for follow on research that might complement the completed Task Order work.

All reports must be submitted to the CTO for this Task Order, the CTO of Project SEARCH and Contracting Officer (CO).

D. Performance Monitoring

The CTO for this Task Order, the CTO of Project SEARCH or the designated Activity Manager who is responsible for the overall performance of the entire contract, and the Contracting Officer will monitor and evaluate the applicant’s overall performance. The applicant should propose a simple Performance-Monitoring Plan (PMP) for monitoring and evaluating the performance of the key tasks required under this Task Order, especially the indicators that will be used to evaluate the contributions/effectiveness of core-funded activities. The CTO or Activity Manager, in consultation with the applicant, may modify the proposed PMP, and will approve it.

The Task Order CTO will conduct yearly performance reviews of the contractor by using the PMP proposed by the Offeror (above), and other indicators mutually agreed upon by the Task Order CTO, and the Applicant in the first 60 days of the contract. A final performance review of Task Order will be scheduled for the final year of the Task Order. An external evaluation of the Task Order may be held in conjunction with any evaluations scheduled for the overall SEARCH contract.

VII. PERSONNEL

A. Key Personnel

Offerors are requested to develop a comprehensive staffing plan (see details below) to accomplish the Statement of Work and the plan should demonstrate an appropriate balance of skills, expertise and efficiency. The key qualifications for this RFTOP include skills and experience in applied program research, management of USAID contracts, translation of research into practice/policy, technical assistance for service delivery scale up, monitoring and evaluation, and utilization of research results. Offerors must specify the positions that should be

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designated as Key Personnel and provide resumes of the candidates proposed for such positions. In addition, offerors should specify the qualifications and abilities of proposed key personnel relevant to successful implementation of proposed technical approach.

Resumes for all key personnel and any additional information for all other proposed personnel should be included in an annex. Three references should be provided in an annex for each of the proposed key personnel with the name, title/position, telephone and email contact information. In each case, at least one reference should be a developing country work contact. In addition, for all key personnel, please include a letter of commitment from each candidate indicating her/his: a) availability to serve in the stated position; b) intention to serve for a stated term; and c) agreement to the compensation levels which correspond to the levels set forth in the cost proposal.

Offerors should: 1) provide a full staffing plan, including support staff, with underlying rationale, an organizational chart indicating lines of authority and staff responsibility accompanied by position descriptions for each position proposed; 2) if being proposed, provide the rationale for the use of consultants and/or locally-hired, long-term resident advisors; 3) propose and justify the configuration of proposed key staff positions in addition to or in substitution of those described below; and 4) provide a matrix of all personnel that is linked to the LOE chart indicating the relevant skills they bring to the performance of this program and the percent time they will work on this activity.

USAID reserves the right to adjust the level of key personnel during the performance of this task order. An illustrative list of possible key personnel positions and qualifications is shown below (offerors shall choose a staffing structure and determine additional qualifications of key staff based on their proposed technical and management approach).

1. Task Order Project Director (part-time, US-based)

- Proven record of excellent management, leadership, decision making
- Demonstrated international credibility as a leader on matters of program research, analysis, use and dissemination in developing countries
- Advanced degree in relevant subject areas, preferably in public health, medicine, social sciences and/or management
- At least 5 years senior level experience working in monitoring and evaluation of public health programs developing countries, preferably including experience in capacity building in monitoring and evaluation of health programs
- Demonstrated success managing international development projects of this scope and complexity for at least 5 years.
- Experience interacting with developing country government, international organization, other bilateral donor and civil society representatives, and senior level government officials

2. Deputy Project Director/Technical position (full-time, US-based)

- Proven record of excellent management, leadership, decision-making and interpersonal skills

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- Advanced degree in public health, social sciences or related field
- Extensive overseas experience (minimum of five years) in monitoring and evaluation of HIV/AIDS programs in developing countries
- Demonstrated experience with and understanding of PEPFAR monitoring and evaluation requirements
- Effective English oral and written communications skills
- Experience interacting with major multi-lateral donors is preferred
- Ability to work with diverse international team

VIII. INSTRUCTIONS TO APPLICANTS

A. Technical Proposal

Technical proposal must be specific, complete and presented concisely. The offerors must demonstrate their capabilities and expertise with respect to achieving the goals of this project. The proposals must take into account the technical selection criteria and evaluation procedures described below. The technical portion of the proposal must not exceed **25 pages**, excluding attachments. Proposals must be on pages of 8-1/2 inch by 11-inch paper, single-spaced, 12-point or larger type in a single column, with one-inch margins on all sides, with tabs to distinguish each section. An outline format using lists and/or matrices, whenever possible, is recommended. Applicants must include resumes of proposed key personnel (three pages maximum per resume) and other proposed staff (two pages maximum per resume) in an annex. Cover pages, dividers, table of contents, and attachments (i.e., key personnel resumes, and letters of commitment) do not count against the 25-page limitation.

The offeror should submit **one original and three hard copies** of the technical proposal. Please also submit on CD an electronic copy of the technical proposal in Microsoft Word 2003 format. Offerors should index sections in a Table of Contents. USAID must receive both the electronic copy (CD) and the hard copies by the submission deadline for the proposal to be eligible for consideration.

Hard copies and CDs of both the technical and cost proposals must be submitted to the location indicated in the cover letter accompanying this RFTOP and by the date and time specified.

The technical proposal must demonstrate the offeror’s capabilities and expertise with respect to achieving the goals of the task order. To facilitate efficient review of proposals, offerors must organize the technical proposal in the format specified below.

Technical Proposal Format

Cover Page – Title, names of organization(s) submitting proposal, contact person, telephone and fax numbers, address and email

Executive Summary (not to exceed 3 pages) – Briefly describe the proposed activities, goals, purpose, technical strategies and methodologies, and anticipated results. Briefly describe

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technical and managerial resources of your organization. Describe how the overall program will be managed.

Narrative (not to exceed 22 pages): The narrative section of the proposal should address the task order goals and objectives and reflect the tasks outlined in Section IV A under the five strategies and contain the following elements:

A. Technical Approach (not to exceed 14 pages)

A1. Overall Technical Approach

Offerors should provide a comprehensive discussion of OVC programming challenges and technical approaches and strategies to achieve the overall goals and objectives of the task order. The technical approach should provide a feasible plan for identifying and influencing cost-effective OVC program delivery models and promoting their implementation in developing countries. Offerors may propose insightful, technically sound activities to identify, develop, and test solutions to OVC service delivery issues. The technical approach should demonstrate offeror’s potential ability to increase efficiency of applied OVC research through the development and use of a range of methodologies. The proposal may outline priority operations research issues and potential activities using core (USAID/Washington) funds. Offerors should also discuss the kinds of activities they would undertake if they were to receive field support. The overall technical approach should include a brief description of procedures to uphold ethical standards and deal with gender-specific OVC issues while planning and implementing data collection and other task order activities.

A2. Global Technical Leadership

Offerors should provide a discussion of efficient strategies and lines of work for advancing global technical leadership in OVC research and evaluation. The discussion may include, but is not limited to: developing and validating tools and/or protocols for application in multiple countries and settings for standard assessments and evaluations; developing approaches and methodologies to advance the understanding of contextual factors affecting OVC and potentially promising interventions to reduce their vulnerability; addressing measurement issues that may help enhance understanding of program impact, reach, potential for scale-up, and sustainability; and approaches to advancing the global dialogue on OVC research and evaluation, including mechanisms for dissemination of emerging evidence and information and facilitating their utilization.

Country Case Studies

Offerors shall respond to two case studies. These case studies are aimed to allow offerors to illustrate how they would design OVC programs under varying field conditions. These case studies will be evaluated according to technical feasibility and how well they address specific country challenges and the overall strategic objective of the task order.

A3. Country-level Case Study 1

Offerors should succinctly describe how they would effectively approach addressing OVC program research and evaluation needs in a situation where much OVC programming is in place yet there is limited systematic knowledge on OVC program quality and effectiveness.

Country X identified OVC as a major priority in their response to HIV/AIDS several years ago. The country currently has a weak service delivery infrastructure, a generalized HIV epidemic, high AIDS-related mortality, and a high prevalence of orphanhood. The government of Country X has developed a national OVC policy as well as a National Plan of Action. Donors, in collaboration with the government of Country X, have been implementing programs intended to support OVC in the hardest-hit districts for the last several years. However, very little is known about the quality and effectiveness of these programs, and whether the overall strategy guiding interventions for OVC is well-targeted and well-implemented. The USG team in Country X, in collaboration with the host country government, would like to update national guidance to promote effective interventions. They want to know if current programming is effective and identify specific models and approaches suited to urban and rural community settings. They are also keen to scale up interventions that have been effective in-country or elsewhere. How would OVC program research approaches and evaluation methodologies be used to achieve these goals?

- Identify OVC program research needs specific to this context but might also have regional relevance;
- Provide examples of existing operations research results relevant to this context that could have an impact on country OVC program and how to incorporate these results into country programs at scale;
- Describe a process of determining country-specific OVC research needs and how these needs would be addressed;
- Discuss the process by which lessons learned from this program research could be synthesized and utilized elsewhere.

A4. Country-level Case Study 2

Offerors should succinctly describe how they would effectively approach addressing OVC research and evaluation in an alternate situation where OVC data are scarce/scattered and both OVC programming and policies are at their infancy.

Country Y has recently recognized that OVC is an emerging issue of concern in their response to the HIV epidemic. Yet little has been done at a national level in terms of policies or plans of action, and there are only a few scattered programs funded by donors to address OVC. The country has a large population, relatively strong infrastructure, and vast private sector capacity. Country Y has a concentrated epidemic with pockets of high HIV prevalence and a relatively low overall prevalence of orphanhood, yet a large OVC burden in terms of absolute numbers. The USG team in Country Y is working with the host country government to assess the magnitude of the OVC problem in Country Y and to define strategic priorities and related

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interventions to help effectively address OVC needs in a targeted manner. How would OVC program research approaches and evaluation methodologies be used to achieve this goal?

- Identify OVC program research needs specific to this context;
- Provide examples of existing research of a more global nature that could be implemented in Country Y;
- Describe a process of determining country-specific OVC research needs and how these needs would be addressed;
- Describe the technical assistance to ministries and service delivery organizations needed to utilize research results that would have a major impact on country OVC program.

B. Staffing, Management, Collaboration, and Past Performance (not to exceed 8 pages)

B1. Staffing

Offerors should provide a summary description of roles, responsibilities and qualifications of all key personnel, headquarters and in-country, to be funded under the task order. Offerors should specify qualifications and abilities of proposed Key personnel relevant to successful implementation and include resumes for key candidates. Resumes should not exceed three pages in length and should be in chronological order starting with most recent experience. Offerors may provide, as an annex, a matrix charting skills and expertise of proposed staff that meet the requirements of the tasks in the SOW. Offerors should include a list of the key personnel proposed for this SOW, as well as their time commitment to the project.

An illustrative list of possible key personnel positions is shown below (offerors shall choose a staffing structure and determine additional qualifications of key staff based on their proposed technical and management approach):

Task Order Project Director (part-time, US-based)

Deputy Project Director/Technical position (full-time, US-based)

Offerors should include in their proposal a roster of short-term OR & M&E technical assistance specialists. Short-term technical assistance plans will be finalized during the implementation planning process, in coordination with the country team and USAID/W staff. Offerors should propose a combination of headquarters, regional and/or international staff and consultants. The use of local field staff is strongly encouraged, as are proposals for building the capacity of investigators in the field to conduct OVC research and evaluation. Offerors should make maximum use of local consultants, as appropriate.

B2. Management and Collaboration

Management: Offerors should demonstrate their organizational ability to plan, implement and support programming in the range of activities outlined in the RFTOP. They should propose an organizational structure to address the breadth, depth and technical areas required to successfully undertake OVC research and evaluation tasks. The management plan should describe the

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management and administrative arrangements for implementation of the task order, including organizational structure, personnel management, and timely institutional review for the protection of human subjects. Summarize how the offeror will respond to Mission requests for OVC program research activities and describe how the offeror will use local in-country staff and resources. Offerors should describe how tasks will be organized and managed to minimize non-productive costs to the government and how the applicant will utilize complementary capabilities of any proposed sub-contractors most effectively and efficiently. Offerors should describe how lines of authority will be managed within their own organization and between the prime contractor and any sub-contractors. Include a plan for how to minimize costs on core-funded and field support activities. Offerors are encouraged to include an organizational chart in an annex.

Collaboration: Offerors should demonstrate the ability to form partnerships with a range of research and policy/advocacy organizations in the US and host countries. They should describe plans for collaboration with USAID staff at HQ and in the field, as well as proposals for collaboration with partners implementing OVC programs, with host country governments, and with other donors. In particular, describe collaboration with local partners in the context of capacity building.

B3. Past Performance

Offerors should provide a self-assessment of their demonstrated institutional ability to plan, implement and support operational and applied research activities citing past performance examples. The examples must be for the past five years for efforts similar to the technical requirements of this RFTOP. Offerors should demonstrate technical accomplishments in applied research on HIV/AIDS service delivery and/or related policy improvement in developing countries, dissemination and utilization of research results, and capacity building of host-country organizations to produce and utilize applied research results. Include past performance forming collaborative partnerships with research and policy/advocacy organizations. Please include related program descriptions, list of tools/peer-reviewed publications/monographs, other knowledge management efforts, and any other relevant information in an appendix.

C. Cost Proposal

The Cost Proposal must be completely separate from the applicant's technical proposal. There is no page limitation on the Cost Proposal. Offerors shall submit a cost proposal for a 36-month task order operating period (starting July 1, 2008). Offerors shall submit their cost proposal in Microsoft Excel format with full access to all formulas and in the following Contract Line Item Number (CLIN) format, by country and by operating period as well as a summary for all countries and for the overall period of performance. The following minimum cost breakdown should be provided: Salary and wages with detailed LOE, Fringe Benefits, Consultants, Travel, Transportation and Per Diem, Equipment and Supplies, Subcontracts, Grants under Contract, Other Direct Costs, Overhead, G&A, Material Overhead, Fee and any other Indirect Cost. Please break out the LOE per CLIN as applicable. For example, CLIN 1 (Salaries) should have an LOE chart for the 20% core funding component and an LOE chart for the 80% field funding component for the first three years of implementation. USAID will set the standard of Full Time

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Equivalent (FTE) of 260 working days/year. USAID anticipates ordering 6.50 FTEs/year for the core funding and 26.00 FTEs/year for field support funding for three years of task order. Please adjust proposed budgets accordingly. Offerors must propose costs that are realistic and reasonable for the work in accordance with their respective technical proposals. The Cost Proposals should have a cover page with the title of the program, name of the organization(s) submitting the Proposal, contact person, telephone numbers, address, and e-mail. Cost proposal must be accompanied by detailed and comprehensive budget notes.

Budget Format

Offerors should submit two (2) hard copies, and an electronic copy on CD in Microsoft Word 2003 for the narrative and budget notes, and in Microsoft Excel 2003 for the budget tables. Adobe Acrobat files for tables will not be accepted.

To support the proposed costs, please provide detailed and comprehensive budget notes or a budget narrative for all costs that explains how the costs were derived as a word document. The following provides guidance on what is needed:

- a. Salary and Wages: Direct salaries and wages should be proposed in accordance with the offeror’s personnel policies.
- b. Fringe Benefits: If the offeror has a fringe benefit rate that has been approved by an agency of the U.S. Government, such rate should be used and evidence of its approval should be provided;
- c. Travel and Transportation: The proposal should indicate the number of trips, domestic and international, and the estimated costs. Specify the origin and destination for each proposed trip, duration of travel, and number of individuals traveling. Per diems should be based on the offeror’s normal travel policies;
- d. Equipment: Estimated types of equipment (i.e., model #, cost per unit, quantity);
- e. Supplies: Office supplies and other related supply items related to this activity;
- f. Contractual: Any goods and services being procured through a contract mechanism;
- g. Grants under Contracts (field support/ Mission funding only). The amount for grants under contracts is fixed for this task order - \$100,000 per year for three years of implementation;
- h. Other Direct Costs: This includes communications, report preparation costs, passports, visas, medical exams and inoculations, insurance (other than insurance included in the applicant's fringe benefits), equipment, office rent abroad, etc. The narrative should provide a breakdown and support for all other direct costs;
- i. Indirect Costs: The offeror should support the proposed indirect cost rate with a letter from a cognizant U.S. Government audit agency, a Negotiated Indirect Cost Agreement

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(NICRA), or with sufficient information for USAID to determine the reasonableness of the rates. (For example, a breakdown of labor bases and overhead pools, the method of determining the rate, etc.);

- j. Fixed fee

Separately should be submitted:

- a. Summary of a breakdown of the anticipated costs of performing the work by task area.
- b. Detailed level of effort (LOE) and labor cost estimates must be submitted in accordance with the SOW split by year. Please provide a separate line item for each proposed individual and identify by name, labor category, daily rate and level of effort. Offerors should use the USAID biographical data form. The total amount of LOE levels are provided below for all positions (US-based and overseas) under this task order.

FTE Core/Person Years		
US-based	FTE Per Year	FTE Total
Technical/Management	3	9.00
Implementation/Support/Consulting	3.5	10.50
Total	6.5	19.50

FTE Field/Person Years		
Overseas	FTE Per Year	FTE Total
Technical Experts/Management (Expatriates)	3.00	9.00
Technical Local Experts/Management (Local Nationals)	13.50	40.50
Implementation/Support (Local Nationals)	9.50	28.50
Total	26.00	78.00

TOTAL CORE and FIELD 97.50

- c) A current resume, in sufficient detail to support the proposed Functional Labor Category, for all U.S. and professional non-U.S. personnel;
- d) A certification of salary for all proposed CCN Direct Labor;

- e) A certification that no USAID employee has recommended the use of an individual or subcontractor under the proposed Task Order who was not initially located and identified by your organization.

Offerors’ proposed budgets must identify core funding cost components and field support cost components in the 3 year contract.

D. Unnecessarily Elaborate Proposals

Unnecessarily elaborate brochures or other presentations beyond those sufficient to present a complete and effective proposal in response to this RFTOP may be construed as an indication of the contractor's lack of cost consciousness. Elaborate artwork, expensive paper and bindings, and expensive visual and other presentation aids are neither necessary nor wanted.

E. Task Order Award

The Government may, without discussions or negotiations, award a task order resulting from this RFTOP to the responsible contractor whose proposal conforms to this RFTOP and offers the best value. Therefore, the initial proposals should contain the contractor’s best terms from a cost and technical standpoint. However, the U.S. Government may reject any or all proposals, accept other than the lowest cost proposal, and waive informalities and minor irregularities in proposals received, should it be in the best interest of the U.S. Government.

Although technical evaluation factors are significantly more important than cost factors, the closer the technical evaluations of the various proposals are to one another, the more important cost considerations become. The Contracts Officer may determine what a highly ranked proposal based on the technical evaluation factors would mean in terms of performance and what it would cost the Government to take advantage of it in determining the best overall value to the Government.

F. Authority to Obligate the Government

The Task Order Contracting Officer (TOCO) is the only individual who may legally commit the US Government to the expenditure of public funds. The contractor may not incur costs chargeable to the Task Order proposal may be incurred before receipt of either a contract signed by the TOCO or a specific, written authorization from the TOCO.

IX. EVALUATION CRITERIA

The task order proposal will be evaluated in relation to the evaluation criteria set forth below. These factors have been tailored to the requirements of this Task Order to allow USAID to choose the highest quality proposal. These criteria identify the significant areas that Offerors should address in their proposals and serve as the standard against which all proposals will be evaluated. Sub-criteria have been assigned specific weights. The proposal will be evaluated for two major criteria: A) technical approach and B) staffing, management and collaboration, and

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past performance. Sub-criteria within each primary criterion will be evaluated according to respective points shown in parenthesis.

Proposed costs shall be evaluated for reasonableness and consistency with the technical proposal. This analysis is intended to determine the degree to which the costs included in the cost proposal are fair and reasonable; and reasonableness of proposed labor rates and fee.

Technical evaluation factors are more important than cost factors in determining the award. Cost may be the determining factor where proposals are essentially of equal technical merit. The overall standard for judging cost will be whether the proposal presents the best value for the cost. The cost proposal will be judged on: a) whether it is realistic and consistent with the technical proposal; b) overall cost control; and c) amount of proposed fee.

The Government may award a task order without discussions with offerors in accordance with FAR 52.215-1, to the responsible applicant whose proposal conforms to this RFTOP and offers the best value. However, the Government reserves the right to conduct discussions if later determined by the Contracting Officer as necessary. Therefore, each initial proposal (written and oral) should contain the Offeror's best terms from a cost or price and technical standpoint.

Source Selection

(a) The overall evaluation methodology set forth above will be used by the contracting officer as a guide in determining which proposal(s) offer the best value to the U.S. Government. In accordance with FAR 52.215-1, award will be made by the contracting officer to the responsible offeror(s) whose proposal(s) represents the best value to the U.S. Government after evaluation in accordance with all factors and sub-factors in this solicitation.

(b) This procurement utilizes the tradeoff process set forth in FAR 15.101-1. If the contracting officer determines that competing technical proposals are essentially equal, cost/price factors may become the determining factor in source selection. Conversely, if the contracting officer determines that competing cost/price proposals are essentially equal, technical factors may become the determining factor in source selection. Further, the contracting officer 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.

A. Technical Approach (50 points)

A.1. Overall Technical Approach (15 points)

- Extent of understanding of the overall goals and objectives of the task order; technical aspects of applied OVC program research; results dissemination and utilization; and local capacity building

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- Technical approaches and strategies for identifying OVC program research needs; improving OVC service delivery models; and performing the core technical leadership and field support activities described in the Statement of Work
- Overall technical merits (clarity, analytic depth, technical knowledge, program relevance, and feasibility) of approaches and strategies to achieve the goals and objectives of the task order

A.2. Global Technical Leadership (15 points)

- Overall global technical leadership vision including OVC research priorities and expected results at the end of three years
- Approaches and methodologies for capturing, synthesizing and promoting lessons learned in the field
- Overall feasibility and technical merits of proposed strategies for advancing OVC program research and achieving the global technical leadership objectives under this task order

A.3./A.4. Country-Level Case Studies (20 points total; 10 points per case study)

- Offerors’ understanding of research and assessment needs in specific contexts; challenges in conducting OVC program research in these contexts; and the extent to which the proposed country-level strategies are feasible and technically appropriate for those contexts
- Extent to which the country strategy aligns with the technical approach (specified in criterion A1) and the overall goals and objectives of the task order

B. Staffing, Management, Collaboration, and Past Performance (50 points)

B.1. Staffing (20 points)

- Demonstrated technical experience and expertise of key staff in program research and evaluation; project management; and design and implementation of complex international research programs
- Ability of key staff to assume OVC research and evaluation technical leadership roles and effectively manage program research efforts in-country, including coordination with USG team and implementing partners
- Extent to which the staffing structure (number and type of positions proposed) is technically strong, has the required skill sets, and aligns with technical requirements of the task order
- Optimal mix and configuration of required skills (demonstrated in organizational chart) for a functional team approach and for maximizing efficiency and minimizing cost

B.2. Management and Collaboration (20 points)

Management:

- Feasibility of management structure for implementation of task order requirements, including technical oversight, personnel management, financial management, and logistic support
- Offerors’ existing and/or proposed organizational presence in countries or regions for rapid start up of task order activities and provisions for timely institutional review of research protocols for protection of human subjects

Collaboration:

- Merit of proposed plans for collaboration with USAID staff at HQ and in the field, as well as with partners implementing OVC programs, host country governments, other donors, and international normative bodies
- Plans for collaborations for dissemination and utilization of research results, knowledge management and other policy communication; and plans for involvement of local partners and organizations in the implementation of OVC program research and potential capacity building efforts

B3. Past Performance (10 points)

- Past performance of the offeror in planning, implementing and supporting operational and applied research activities of similar scope as specified in the RFTOP and forming collaborative partnerships with international research and policy/advocacy organizations
- Demonstrated technical accomplishments in applied research on HIV/AIDS service delivery and/or related policy improvement in developing countries, dissemination and utilization of research results, and capacity building of host-country organizations to produce and utilize applied research results

Note: Any offeror lacking relevant past performance history (e.g., a sub-partner taking the lead on this task order) shall be given a “neutral” past performance rating that neither rewards nor penalizes that offeror.

Appendix 1: Illustrative OVC Applied Research and Evaluation Activities

1. Developing and validating tools

- Pilot testing tools and indices (e.g., Child Status Index) and using findings to develop application protocols for broader use
- Examination and comparison of child protection mechanisms across several countries to identify promising models for replication

2. Conducting evaluation studies

- Examining what models are most feasible for scale up and how OVC programs can achieve a balance between scale and quality
- Evaluating mechanisms for channeling resources to communities and grassroots organizations to meet the needs of vulnerable families and children.
- Evaluating programs effectiveness in addressing areas of risk as well as promoting resiliency

3. Comparing service delivery approaches

- Comparing methods for monitoring quality service delivery to meet individual child and family needs, including costing of services and an analysis of how services are making a measurable difference in the lives of children and families
- Comparing different types of food security programs (e.g., cost-shared school feeding programs, after care programs, community gardens, etc) to identify potential model food security programs for OVC that are working, cost-effective and can be sustained by communities themselves

4. Formative research, assessments, data analysis

- Analysis of clinical, community-level and population-based epidemiologic, demographic and nutrition data in order to strengthen program responses for OVC
- Assessing how communities define, measure and track the quality of services for OVC through case studies and qualitative research
- Examining early childhood issues within national development agendas in order to initiate pilot studies and identify and test various interventions
- Secondary analysis and modeling of OVC-related data for program planning

5. Knowledge management

- Contributing to OVC research meetings and other OVC research-related activities, including literature reviews, literature synthesis, documentation and publication of findings
- Developing and disseminating tools or indicators in order to collect, analyze, and present data to promote better use of data in planning, policy making, managing, monitoring, and evaluating OVC programs