

1. REQUEST NO. 72049223Q00008-01	2. DATE ISSUED 11/17/2023	3. REQUISITION/PURCHASE REQUEST NO.	4. CERT. FOR NAT. DEF. UNDER BDSA REG. 2 AND/OR DMS REG.1	RATING
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5a. ISSUED BY

United States Agency for International Development, Philippines
(USAID/Philippines)

6. DELIVERY BY (Date)

7. DELIVERY
 FOB DESTINATION OTHER (See Schedule)

9. DESTINATION
a. NAME OF CONSIGNEE
USAID/Philippines

5b. FOR INFORMATION CALL: (No collect calls)
NAME
CARLOS S. GUZTERREZ, EXO
Carlos S. Guzterrez

AREA CODE (+63 2)	TELEPHONE NUMBER NUMBER 5301-2000
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b. STREET ADDRESS

1201 Roxas Boulevard, Ermita 1000

8. TO:
a. NAME
b. COMPANY
USAID/Philippines

c. STREET ADDRESS
1201 Roxas Boulevard, Ermita 1000

c. CITY
Manila, Philippines

d. CITY	e. STATE	f. ZIP CODE	d. STATE	e. ZIP CODE
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10. PLEASE FURNISH QUOTATIONS TO THE ISSUING OFFICE IN BLOCK 5a ON OR BEFORE CLOSE OF BUSINESS (Date)
12/01/23

IMPORTANT: This is a request for information, and quotations furnished are not offers. If you are unable to quote, please so indicate on this form and return it to the address in Block 5a. This request does not commit the Government to pay any costs incurred in the preparation of the submission of this quotation or to contract for supplies or services. Supplies are of domestic origin unless otherwise indicated by quoter. Any representations and/or certifications attached to this Request for Quotations must be completed by the quoter.

11. SCHEDULE (Include applicable Federal, State and local taxes)					
ITEM NO. (a)	SUPPLIES/SERVICES (b)	QUANTITY (c)	UNIT (d)	UNIT PRICE (e)	AMOUNT (f)
	Transition Management Workshop Planning Services (See attached SOW for details)				

12. DISCOUNT FOR PROMPT PAYMENT	a. 10 CALENDAR DAYS (%)	b. 20 CALENDAR DAYS (%)	c. 30 CALENDAR DAYS (%)	d. CALENDAR DAYS	
				NUMBER	PERCENTAGE

NOTE: Additional provisions and representations are are not attached

13. NAME AND ADDRESS OF QUOTER			14. SIGNATURE OF PERSON AUTHORIZED TO SIGN QUOTATION		15. DATE OF QUOTATION	
a. NAME OF QUOTER			16. SIGNER		b. TELEPHONE	
b. STREET ADDRESS						
c. COUNTY			a. NAME (Type or print)		AREA CODE	
d. CITY			e. STATE		f. ZIP CODE	
			c. TITLE (Type or print)		NUMBER	

**REQUEST FOR QUOTATIONS
SOL-72049223Q00008-01
(This supersedes the solicitation posted last September 18, 2023)
Posting Date: November 17, 2023**

**Transition Management Workshop Planning Services
December 2023 - February 2024
QUOTE SUBMISSION DUE DATE: December 1, 2023**

INTRODUCTION AND BACKGROUND

USAID/Philippines and Mongolia require services to facilitate planning and execution of a Transition Management Workshop. The contractor will facilitate planning and executing a Mission-wide event to enhance the transition of mission operations necessary for effective performance. Contractor will provide planning assistance through working with key Mission staff and a local facilitation firm in advance of the event and serve as a project manager (under the direction of the Contracting Officer) leading local facilitators to execute the event.

Logistics - Key Details

Participants: Contractor will assist with planning and executing an event for approximately 150 USAID colleagues from USAID/Philippines and Mongolia, USAID/Pacific Islands, and USAID/Papua New Guinea, Solomon Islands, and Vanuatu. The diverse group of American and Foreign Service National (FSN) staff includes long-serving and new colleagues.

Dates: Planning has begun internal to USAID. Contractor is expected to work with key Mission staff and a local facilitator to develop a detailed agenda for a three-day event, to be held o/a the week of March 18, 2024. Contractor is expected to be present during the event and help manage the local facilitator in conducting it.¹

Location: In the planning phase, support is expected to be primarily virtual during times which are convenient for staff based in Manila, Philippines. Bidders may propose an in-person TDY if they believe it would be beneficial to the planning process, to conduct any key interviews prior to the event. Contractor will be expected to be present for the event o/a the week of March 18, 2024 (to be confirmed) to help execute it.

¹ Please note that the Mission will be responsible for procuring a local facilitator.

Venue: TBD, but expected to be a hotel in Manila with a large ballroom and multiple (9-10) breakout rooms. Expectation is that the group will spend 2-3 days together. Depending on the planning process including approval from USAID leadership, it is anticipated that the first two days will be as a group and the third day would allow for sustained breakout sessions by the operating units to advance the relevant change management objectives. We expect plenary sessions in a ballroom and smaller “breakout” sessions in small conference rooms. (NOTE - Venue will be procured separately and provided by USAID.)

Background

In less than a decade, the U.S. Government (USG) commitment in the Pacific Islands region has grown tremendously – in terms of programs, staffing, and funding. The growth trajectory began in 2017 with the launch of the USG's first Indo-Pacific Strategy (IPS), which outlined a vision for a free and open Indo-Pacific region. In 2019, the USG reinforced the IPS with the Pacific Pledge, a \$300 million tangible commitment to the Pacific Islands region. At the time, USAID/Philippines' programs in the Pacific focused almost exclusively on environment and disaster risk reduction and were mostly managed from Manila. Under the Pacific Pledge, USAID's budget grew and programming and staff increases followed. Between 2017 and 2021, the Pacific Islands portfolio grew from 13 staff managing a \$38 million annual portfolio to 31 staff managing a \$90 million annual portfolio. The mission's in-country presence expanded to Fiji, PNG, Palau, Federated States of Micronesia, and Republic of Marshall Islands, with 29 of the 31 positions based in the Pacific (with 9 still vacant in 2021). USAID programming expanded to include economic growth and digital connectivity, democratic governance, and COVID-19 response, in addition to ongoing programming for natural resource management, disaster risk reduction, and humanitarian assistance.

In January 2022, a Mission Management Assessment (MMA) recommended that USAID needed to change its approach in the Pacific to meet the new geopolitical reality and advance foreign policy priorities and recommended that USAID establish two new operating units in the Pacific region. The MMA also put forward 36 recommendations to streamline operations, empower staff (particularly FSNs), and follow up on concerns identified in a 2021 USAID Staff Care report. Mission management assembled a working group drawn from Manila and the Pacific and identified teams to address the recommendations.

In January 2023, with the COVID travel restrictions lifted, the Mission brought all 150+ staff from eight countries to Manila for a 2023 “Mission Week.” In addition to time set aside for briefings and portfolio reviews, all Mission staff gathered together for a two and a half day conference. The focus of the time together was four-fold: (1) appreciating Mission accomplishments, (2) diversity, equity, inclusion, and accessibility (DEIA), (3) following up on the status of the MMA recommendations, and (4) teambuilding. While the MMA had approximately 36 recommendations, significant progress had been made, such that the mission had completed 28 of 33 mission-level recommendations. The remainder fell into four major categories: (1) improve communications, particularly regarding the transition in the Pacific, (2) prioritize FSN

empowerment, (3) rationalize the workload, and (4) increase staff resilience. These four areas remain management priorities.

Following the MMA's recommendation, in August 2023, a new USAID/Pacific Islands mission in Fiji was launched to oversee programming in the nine countries of Fiji, Kiribati, Marshall Islands, Micronesia, Nauru, Palau, Samoa, Tonga, and Tuvalu, and a Country Representative Office was launched in PNG to oversee PNG, Solomon Islands, and Vanuatu programming. The hiring surge accelerated in 2023, with USAID working to onboard 51 staff across the Pacific Islands region by 2025. As of September 2023, USAID has 22 staff based in five countries in the Pacific (Fiji, Marshall Islands, Micronesia, Palau, Papua New Guinea and Solomon Islands). Nine additional U.S. Direct Hire (USDH) positions are being advertised on the upcoming Major Listing to be filled in 2024, and 25 FSN positions are in various stages of development and recruitment (as of September 2023). Meanwhile, staff from every office in Manila continue to support the Pacific Islands portfolio.

This rapid growth necessitates that many operational, management, and programmatic changes will need to be made to support the new USAID/Pacific Islands Mission and USAID/Papua New Guinea, Vanuatu, and Solomon Islands Country Representative Office. Staff in Manila and across the Pacific will both inform and implement the transition in phases. These phases are:

Phase 1: August 2023 launch through December 2023: In this early phase of transition, staff will need to remain flexible as interim solutions are put in place while longer-term discussions are ongoing. For example, it is under the Contracting Officer's authority to assign Activity Managers to mission awards as appropriate. New FSN staff may be able to take on activity management roles until they are COR/AOR certified, a process that can take one to two years.

Phase 2: January-July 2024: This phase will be punctuated with an all-staff offsite in Manila in March 2024 focusing on change management and team-building and will end in approximately July 2024, as new USDH positions are filled in Suva and Port Moresby (and as a number of new FSNs are expected to be onboarded).

Phase 3: August 2024 and beyond – During this period, many project management roles will likely shift from Manila to the Pacific as more staff onboard and are trained. Many support services (e.g., financial; contracting; legal, etc.) will continue to be provided from Manila.

The March 2024 Transition Management Workshop is envisioned to be a key opportunity for Mission leadership to hear from the team, communicate the way forward, and to lead, with the assistance of professional facilitators, recognizing the need to operationalize and manage change effectively and transparently.

Scope of Work

The Mission intends to engage a contractor to help plan and facilitate the o/a March 2024 Transition Management Workshop, in conjunction with Mission staff and a local facilitator. We expect there to be plenary sessions in which all participants learn the same information (e.g., messages from leadership; sessions on change management principles, etc.) and smaller breakout sessions (approximately ten of them, with approximately 15 participants each) where colleagues can work together to learn, share, and plan. We anticipate the local facilitator will have a sufficiently large team in place to staff the event effectively.

Pre-Work

It may be helpful for participants to do some pre-work ahead of the workshop. This might include an impactful, but realistic in length, reading list or video references on key topics. It might also include office-by-office planning for key events in the year ahead (e.g., will there be major events in the Pacific that require support from Manila; should support services office coordinate on a joint TDY in which a partner meeting could be held; etc.).

Anticipated Workshop Themes

1. Change Management: We expect this to be the central theme of the workshop.
 - a. What are best practices or tools we can use to help the team transition from one Mission covering 14 countries based out of Manila to three Missions? Specifically: USAID/Papua New Guinea, Solomon Islands, and Vanuatu; USAID/Pacific Islands; and USAID/Philippines and Mongolia.
 - i. Note, "the team" includes long-time FSN staff based in the Philippines and new FSN colleagues in the Pacific and in the Philippines, in addition to American colleagues with varying experience levels.
 - b. How do we need to adjust our thinking in order to work together effectively?
 - c. What needs to change? What needs to stay the same?
 - d. How to communicate change effectively?
 - e. How to build a culture of change and manage resistance to changes?
 - f. How to onboard and welcome new colleagues and train them effectively/set them up for success?
 - g. What are the next steps? This may be different for different offices, e.g.:
 - i. Technical
 - ii. Program
 - iii. DOC/Communications
 - iv. RFSC/Financial
 - v. EXO (Executive Office)
 - vi. ROAA (Regional Office of Acquisition and Assistance)
 - vii. Legal
 - viii. BHA (Bureau of Humanitarian Affairs)

2. Stress and Resilience: for some, change is exciting; for others, change is hard! What tools/practices might work for our team as we go through this process.
 - a. Managing stress in a time of change.
 - b. Building resilience: support networks; appropriately setting boundaries; self-care; mindfulness techniques.
3. FSN Empowerment: as part of the planning for the workshop, we will want to consult with the FSN Committee to get recommendations on how to continue discussions from the January 2023 retreat and update them based on the Agency's March 2023 FSN Empowerment Implementation Plan.
4. Teambuilding: We would like to welcome new leadership and colleagues. How can a tool enable colleagues to learn to work together effectively? Other activities might focus on:
 - a. Building culture/ creating a sense of belonging
 - b. Getting to know one another better and building trust and rapport
 - c. Enhancing creativity and problem solving
 - d. Increasing motivation and morale
 - e. Improving communication and collaboration.

Delivery Requirements

Provide planning services for the Transition Management Workshop to be held o/a March 2024 (as noted above under Logistics). The schedule would likely be from 7:00 am (with thirty minutes to settle in/have coffee) through 3:30 pm, including a one hour lunch, and appropriate coffee breaks. We anticipate the contractor would hold regular, weekly meetings with USAID leadership and a local facilitation firm to plan the workshop from approximately December 2023 through the event. The contractor would also be expected to attend and help execute the event, serving as a "project manager" and assisting with directing the local facilitator.

Task 1: Retreat Session Design

Contractor will meet weekly with USAID and a local facilitator to design an effective offsite workshop event.² Contractor will meet with USAID leadership to further understand the goals and based on that meeting will draft a proposed session design. The session design will include a defined purpose statement capturing the overall intent of the workshop and specific tangible outcomes the contractor, in conjunction with a local facilitation firm, would like to achieve during the retreat. The contractor will then meet again with USAID leadership to refine the draft design and produce a final session design and participant agenda.

Task 2: Retreat Facilitation

The contractor will assist with managing a local facilitation team (expected to have at least 12 facilitators (at least 2 for the plenary sessions and at least 1 per breakout room)) to conduct all

² We anticipate that the Contractor may be asked to serve as a non-voting senior advisor on the TEC for a local facilitator.

sessions and record notes of significant outcomes. The contractor will work with the facilitation team to ensure all voices are heard, take into account different personality types and learning styles, and provide a variety of interesting, effective, and interactive exercises that will accomplish the overall meeting purpose and achieve the specific, tangible outcomes defined in advance.

Task 3: Meeting Report

The local facilitation team will capture retreat outcomes in a succinct meeting report including an executive summary and next steps. This report will include:

- Summaries of plenary discussions and decisions related to defined retreat outcomes;
- Pictures of any flip charts or other artifacts produced during the sessions; and
- Agreed upon next steps.

The Contractor will be asked to edit and review the report for submission to the Contracting Officer for approval.

Task 4: Leadership Follow Up (OPTION) Please provide a price quotation for small follow-up events with USAID leadership. These events might be done virtually with a lead facilitator or in-person with the services of a local facilitator. Such events might be one-two days in duration, and take place within one year of the workshop.

Provide a price for tasks outlined above necessary to complete the work which at minimum have the following elements:

TASK 1-3 FIRM FIXED PRICE:

CLIN	TASK	PRICE
0001	Task 1 - Retreat Session Design	
0002	Task 2 - Retreat Facilitation	
0003	Task 3 - Meeting Report	

TOTAL PRICE (Tasks 1-3): _____

OPTION - TASK 4 -LABOR HOUR

Offeror proposes a not to exceed amount for the subject task. If the option is exercised, the task will be based on labor hour.

CLIN	TASK	LABOR	HOURS	PRICE/HOUR

		CATEGORY		
OPTION 0004	Task 4 - Leadership Follow Up			

This option will be incrementally funded if the option is exercised and based on labor required for individual tasks. Final cost may be below not to exceed price.

TOTAL NOT TO EXCEED PRICE: _____

THE GOVERNMENT RESERVES THE RIGHT TO AWARD THIS ACTIVITY WITH OR WITHOUT DISCUSSIONS TO THE OFFEROR WHOSE PROPOSAL IS IN THE BEST INTEREST OF THE US GOVERNMENT.

52.214-34 SUBMISSION OF OFFERS IN THE ENGLISH LANGUAGE (APR 1991)

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

52.214-35 SUBMISSION OF OFFERS IN U.S. CURRENCY (APRIL 1991)

Offers submitted in response to this solicitation shall be in terms of U.S. dollars. Offers received in other than U.S. dollars shall be rejected.

52.216-1 TYPE OF CONTRACT (APR 1984)

The Government contemplates award of a hybrid contract - A) Fixed Price for a Product and Service contract for Tasks 1, 2 and 3, and B) Labor Hour for Option - Task 4 resulting from this solicitation.

Proposal Requirements:

Narrative: Each offeror shall provide a narrative as part of their offer. Discuss how you plan to coordinate planning for the workshop, facilitation of the workshop, and reporting. Discuss any proposed materials you may use as part of the workshop. Narrative shall be no more than 4 pages. Include bio of contractor available for this o/a March 2024 event. (Bios and Annexes are excluded from narrative length).

Annex 1: Timeline: Provide an estimated timeline/schedule for completion of: Task 1: Retreat Session Design, Task 2: Retreat Facilitation and Task 3: Meeting Report and Task 4 Option if exercised.

Annex 2: Project Experience: Include annex with any relevant experience planning events such as this one, especially with USAID groups.

Annex 3: Past Performance: Include relevant past performance as outlined in Section D.

Cost Proposal: Offerors are to provide price quotes for the above services.

SECTION D - TECHNICAL EVALUATION CRITERIA

- 1) **Technical Understanding:** Each offer shall provide a narrative as part of their offer. Discuss how you plan to facilitate event preplanning, key elements of the workshop (Change Management, Stress and Resilience, FSN Empowerment and Team Building) as well as post event reporting/follow up.
- 2) **Project Experience:** Provide information on 3-5 comparable projects completed in the last 5 years which clearly demonstrates relevant technical capability for the services required under the RFQ.
- 3) **Past Performance:** Provide CPARS or customer Points of Contact on previous jobs.

SECTION H - SPECIAL CONTRACT REQUIREMENTS

H.1 Conflict of Interest

The term "conflict of interest" means because of other activities or relationships with other persons, a person is unable to or potentially unable to render impartial assistance or advice to the Government or the person's objectivity in performing the contract work is or might be otherwise impaired or a person has an unfair competitive advantage. The term "person" includes a business organization. The contractor warrants, that to the best of their knowledge and belief, it does not have any organizational or personal conflict of interest.

The contractor agrees that if in the performance of this contract it discovers a potential conflict of interest with respect to the contract, it shall make immediate and full disclosure in writing to the Contracting Officer pursuant to:

[FAR 52.203-16 PREVENTING PERSONAL CONFLICT OF INTEREST \(JUNE 2020\)](#)

[AIDAR 752.209-71 ORGANIZATIONAL CONFLICT OF INTEREST DISCOVERED AFTER AWARD \(JUNE 1993\)](#)

H.2 Non-Disclosure

In the performance of this contract, the contractor may have access to data or discussions which are proprietary, pre-decisional, and/or non-public information. The contractor agrees that it will not use such data/information in performance of other contracts which result directly from work performed under this contract. Staff working on Tasks associated with this proposal will be requested to sign a Non-Disclosure Agreement as discussions held within the Transition Management Workshop may contain pre-decisional and/or non-public information.

METHOD FOR AWARD:

Evaluation of Quotations:

To be considered acceptable and eligible for evaluation, quotations must be completed in accordance with and comply with the requirements of this document and meet all of the technical requirements set forth in the RFQ.

Upon receipt of the request for quotations the Contract Specialist will review the quotes submitted to determine compliance with administrative areas and our technical team will evaluate technical portions of the RFQ.

The Government reserves the right to discussions however award may be made based on initial quotations received without discussions.

All contractors will be evaluated equally based on the technical and cost proposal in accordance with the statement of work, technical understanding, experience, past performance and price. Award will be based on the best value for the Government.

Technical Understanding – The contractor demonstrates understanding of task requirements outlined in the scope of work.

Experience – The contractor must have a demonstrated expertise in performing contracts of similar size and scope.

Past Performance - Submission of up to five references to substantiate the quality of the work performed on past projects of similar size and scope.

Price - Provide pricing where required in the RFQ.

Award will be based on a best value determination made by the Government in accordance with the RFQ requirements, technical understanding, experience, past performance and price. As technical merits of the proposals become more equal, price may become the determining factor. USAID shall determine what trade-off between technical merit and price promises the greatest value to the Government price and other factors considered.

Contractors are advised that the Government reserves the right to make an award on this RFQ without discussion.