



USAID | PHILIPPINES

FROM THE AMERICAN PEOPLE

REQUEST FOR QUOTATIONS
SOL-72049224Q00005
Posting Date: January 23, 2024

USAID/Philippines is soliciting quotations from local contractor qualified to supply the following:

Facilitation Services for the Transition Management Workshop

Vendor quotes should be valid for a period of at least 90 days and cover the stated period of performance.

All responsible sources may submit a response which, if timely received, shall be considered by the agency.

Deadline of submission of quotation is on January 30, 2024 (3:30 PM, Manila Time). A Purchase Order (P.O.) will be awarded to the selected vendor.

Please email your Company Profile and firm fixed-price offer (VAT exempt) to philippinesmanilaexopsd@usaid.gov of the Executive Office/Procurement Services Division.

Note: USAID Philippines is a VAT exempt organization. Payment shall be made via electronic fund transfer (EFT) within 30 days from receipt of items ordered and copy the invoice. USAID Acquisition & Assistance Vendor Request/ Update Form will be provided to the vendor upon award.

*For all actions which are over \$25K, prospective vendors must be registered within the Central Contractor Registration (CCR) which is now under System for Award Management (SAM). Refer to this site for details on the registration process:
<https://sam.gov/content/home>*

Cleared by: 
Deputy Executive Officer

Date: JAN 23 2024

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RFQ Posting Date: January 23, 2024
Quote Submission Due Date: January 30, 2024

Introduction and Background

USAID/Philippines and Mongolia require services to facilitate planning and execution of a Transition Management Workshop. The contractor will work closely with a lead facilitator designated by the Mission who will serve as the project manager for the workshop. Together, the contractor and the lead facilitator/project manager will facilitate planning and executing a Mission-wide event to enhance the transition of mission operations necessary for effective performance.

It is expected that the assignment will require two main facilitators to collaborate on the workshop design and planning, plus an additional 7-8 facilitators to support breakout sessions during 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 include long-serving and new colleagues. Select individuals from USAID's Asia Bureau and Washington offices may join.

Dates: Planning has begun internal to USAID and the lead facilitator/project manager has been selected. Contractor is expected to work with the lead facilitator and key Mission staff 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 assist the lead facilitator in executing the event.

Location: In the planning phase, support is expected to be primarily virtual during times which are convenient for staff based in Manila and select Pacific island locations. In-person support will be required the week prior to the event (March 11 to 15, 2024) and during the event itself.

Venue: The Mission has secured meeting space at the Diamond Hotel on Roxas Blvd. in Ermita, consisting of a large ballroom and 9 break-out rooms. Expectation is that the participants will spend 2-3 days together, in a mix of plenary and break-out sessions. 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 has been 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 a lead facilitator/project manager and key Mission staff. 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.

Such facilitators are trained to help a group of people understand common objectives and assist them in achieving those objectives without taking a particular position in the discussion. Facilitators assist the group in achieving a consensus on any disagreements that pre-exist, or emerge in the sessions, so that the group has a strong basis for future action. The facilitator shall not lead the group toward an answer that he/she thinks is best even if he/she possesses an opinion on the subject matter. The facilitator's role is to make it easier for the group to arrive at its own response (answer, decision, or deliverable).

Standard facilitation skills include:

1. Following good meeting practices, such as keeping time, producing and adhering to an agreed-upon agenda, and keeping clear records.
2. Group management, including careful observation of group dynamics, individual participation styles, participation balancing, and making safe space for more reticent group members.
3. Employing a variety of listening skills, such as the ability to paraphrase, stack a conversation, and draw people out. Using such skills, the facilitator shall set a civil and productive tone for each part of the PDO event, manage incidences of conflict and/or confrontation during each session so that everyone has the ability to make comments and contribute to the dialogue, and facilitate the flow of discussion toward the goal of the PDO event.

The facilitator shall help workshop participants articulate their comments, suggestions, and recommendations in each session; record comments, suggestions and recommendations in a record of each meeting; and indicate to participants that comments, suggestions and recommendations are being accurately summarized and relayed to the Mission.

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.
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Delivery Requirements

Provide planning services for the Transition Management Workshop to be held o/a March 18 – 21, 2024 (as noted under Logistics). The schedule would likely be from 7:00am (with thirty minutes to settle-in/have coffee) through 3:30pm, including a one-hour lunch, and appropriate coffee breaks. We anticipate the contractor would participate in regular, weekly meetings with USAID leadership and the lead facilitator/local facilitation firm to plan the workshop, held on Tuesdays each week, from early February through the event. The contractor will be expected to execute the event, following the direction of the lead facilitator/project manager.

Task 1: Retreat Session Design

The contractor will meet weekly with USAID and the lead facilitator/project manager to design an effective offsite workshop event.

The lead facilitator/project manager will have begun conducting key informant interviews and issuing a staff survey to solicit team input on the Transition Management Workshop prior to award of this contract. The contractor will support the lead facilitator/project manager in the analysis of the interview and survey data and subsequent drafting of the workshop objectives and 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 the lead facilitator/project manager, would like to achieve during the retreat. The contractor will help present the session design to USAID leadership, solicit their feedback, and then refine the draft design and produce a final session design and participant agenda.

The contractor will rent a meeting room at the Diamond Hotel from March 11 -15 in which to hold pre-event planning meetings in person with the lead facilitator/project manager, the full facilitation team, and also run-throughs of presentations with key presenters.

Task 2: Retreat Facilitation

The contractor will provide at least 10 facilitators (2 for the plenary sessions and 8 more for the breakout sessions) to conduct all sessions and record notes of significant outcomes. The contractor will work 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 contractor will capture retreat outcomes in a succinct meeting report including an executive summary and next steps. The report will include 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's report will be reviewed by the lead facilitator/project manager prior to submission to the Contracting Officer for approval.

Task 4: Leadership Follow On

Please provide a price quotation for small follow-up events with USAID leadership. These events might be done virtually in collaboration with the lead facilitator/project manager, or conducted in person with design support from the lead facilitator/project manager. Such events might be one-two days in duration and take place within one year of the workshop.

Performance Period

- Task 1: Retreat Session Design o/a February 5 – March 15, 2024
- Task 2: Retreat Facilitation o/a March 18 – 22, 2024
- Task 3: Meeting Report ending o/a April 26, 2024
- Task 4: Optional Leadership Follow On ending o/a February 2025

Payment Terms

USAID/Philippines will process the above payment once the Consultant has submitted a letter requesting for payment/invoice, duly accepted and signed by the Executive Office to signify that the required deliverable/s have been completed as described above. Payment shall be made through electronic fund transfer (EFT).

Authority to make commitments

The contractor will have no independent authority to commit U.S. Government (USAID) funds.

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Submission Process and Evaluation Criteria

Interested Parties should submit the following by January 30, 2024 at 3:30PM (Philippine Standard Time):

- (1) A letter of interest indicating the capacity and experience (evaluation weight: 60%);
 - (2) Curriculum Vitae of the two main facilitators outlining professional background and experience (evaluation weight: 40%)
 - (3) A VAT Exempt quotation (including professional fees and miscellaneous charges)
- Total number of pages for the above should not exceed 10 pages.

Important FAR Clauses to be included upon submission of quote

FAR Representation at 52.204-24 Representation Regarding Certain Telecommunications and Video Surveillance Services or Equipment. FAR Clause 52.204-25 (August 2020) Prohibition on Contracting for Certain Telecommunications and Video Surveillance Services or Equipment.

Systems for Awards Management Registration

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