



REQUEST FOR PROPOSALS (RFP)

RFP # EIP-H-2022-001

Published by: World Council of Credit Unions, Inc. (WOCCU)
Economic Inclusion Project (EIP)



World Council

REQUEST FOR PROPOSALS

World Council of Credit Unions, Inc. (WOCCU)

The Economic Inclusion Project (EIP)

Peru and Ecuador Security Plan

RFP # EIP-H-2022-001

Date of Publication: May 9, 2022

Published By: The Economic Inclusion Project (EIP)

Deadline to Submit Questions: May 23, 2022; 5:00pm EST

Submit Questions to: Ms. Victoria Ansarah; vansarah@woccu.org

Deadline to Submit Proposals: June 6, 2022; 5:00pm EST

Submit Proposals to: consult@woccu.org

Duration: Estimated five weeks

Location: Remote – Peru and Ecuador

Subject: Peru and Ecuador Security Plan

Contents

I. Opportunity Summary	1
II. Background.....	1
III. Anticipated Scope of Work	2
A. Overview.....	2
B. Anticipated Tasks.....	2
C. Reporting.....	3
D. Deliverables.....	3
IV. Instructions for Technical Proposals.....	3
A. General Instructions.....	3
B. Questions related to RFP.....	4
C. Proposal Cover Letter	4
D. Technical proposal requirements	4
1. Technical Qualifications:	4
2. Personnel Description:	4
3. Project Work Plan (not included in page limit):.....	5
E. Cost proposal Requirements.....	5
V. Technical Evaluation.....	5
VI. Procurement Schedule.....	6
VII. Determinations	6
A. Compliance Terms:.....	6
B. Source and Nationality.....	7
VIII. Disclaimer	7
Attachment A: Cover letter template format.....	8
Attachment B: Proposal Checklist.....	9

I. Opportunity Summary

World Council of Credit Unions (WOCCU) is seeking proposals for development of a security plan and related services for a project based in Peru and Ecuador, including:

- Create project security plan/manual for two-country project, including outlines of specific procedures and protocols based on required program activities (and adjusted for areas/neighborhoods of activities), and an evacuation plan
- Provide overall project security assessment, outlining any identified risk and recommended mitigative measures

II. Background

Founded in 1971, the World Council of Credit Unions' (WOCCU) is the apex credit union trade association and an international development implementer focused on supporting financial institutions to reach underserved markets. WOCCU is the world's leading advocacy, innovation, and good governance provider for credit unions with the belief that all people should have access to affordable, reliable, and sustainable financial services. With funding from a wide range of multi-lateral, government, and private partners, WOCCU promotes economic security, resilience, and livelihoods strengthening through the sustainable development of local, well managed, savings led financial institutions. WOCCU reaches the marginalized and traditionally unbanked populations and provides a range of affordable pro-poor financial products and services in 118 countries worldwide.

The Economic Inclusion Project (EIP) is a three-year, USD \$14 million cooperative agreement funded by the United States Agency for International Development (USAID) and implemented by the World Council of Credit Unions (WOCCU). The project is designed to generate socioeconomic security for Venezuelan refugees and migrants in Peru and Ecuador, as well as for the members of the local communities they inhabit. Project activities are concentrated in the cities of Lima, Peru and Quito and Guayaquil, Ecuador. These geographies were selected due to the large population of Venezuelan refugees and migrants in the areas.

Specifically, EIP has three general objectives:

1. Support and strengthen new and existing entrepreneurs by ensuring sustained income through self-employment;
2. Facilitate access to employment by identifying market needs and developing skills; and
3. Increase access to financial services and products by supporting financial institutions in the development of products adapted to the diverse needs of the beneficiaries.

In response to the significant impact that gender disparities have on economic independence and stability, EIP has integrated gender inclusion into the three objectives outlined above. All of EIP's technical activities include an analysis of gender considerations that have been integrated into project methodologies and interventions.

Additionally, EIP delivers critical GBV prevention and accompaniment. This ensures that survivors of GBV are given the support and assistance necessary to ensure that they are able to participate in EIP activities, promoting the economic autonomy of survivors.

III. Anticipated Scope of Work

A. Overview

EIP currently implements activities in Lima, Peru, Quito, Ecuador and Guayaquil, Ecuador and operates out of offices based in Quito, Ecuador and Lima, Peru. Through this engagement, WOCCU is **seeking experienced service providers** to develop a security plan for our project activities in Lima, Peru, Quito, Ecuador and Guayaquil, Ecuador. WOCCU currently operates out of office locations in Lima, Peru and Quito, Ecuador with local staff travel to Guayaquil, Ecuador and various locations in Peru that may be considered during the analysis.

B. Anticipated Tasks

In order to achieve the desired objectives of this engagement, WOCCU anticipates the following tasks to be completed. This list of tasks is illustrative and subject to change based on the proposals received and based on the experiences of the selected candidate. Note that any proposed in-person activities should be accounted for accordingly in the proposal budget and timeline, should consider the relevant COVID-19 prevention biosecurity protocols in place, and propose alternative methods of completion should in-person activities be restricted or unavailable.

1. Risk Assessment: Conducted remotely or in-person, the selected candidate will be requested to identify, document, and evaluate relevant risks in the selected geographic zones noted above. The candidate should be sure to demonstrate an understanding of the country context in relation to the risks and threats specific to the urban areas of operation as well as the larger regional context.
2. Development of Security Plan: Following the presentation and validation of the risks and threats identified in the risk assessment, the candidate will be requested to develop a comprehensive security plan that includes an evacuation plan which outlines specific procedures and protocols based on required program activities and within project resources.

The plan should include the following, with specifics by country, as applicable:

- Overall project security assessment, outlining any identified risk and recommended mitigative measures
 - Develop triggers to escalate security and/or evacuation processes and procedures
 - Support to staff during travel to specific urban zones of project implementation
 - Additional security measures for the office
 - Identification of safe locations around the offices should an evacuation be needed.
 - Evacuation plans as needed to ensure safety of the staff
 - Evacuation plan for expatriate staff
3. Presentation of Security Plan and Protocols: Once developed, the candidate will be requested to validate the security plan and relevant protocols with project directors and home office management. This activity may be conducted virtually or in-person based on program resources and the candidate's proximity to program operations. The candidate

may select to develop complementary resources to conduct this activity (e.g., a PowerPoint presentation), but no additional resources are required by project.

C. Reporting

The selected candidate will be expected to report to the EIP Program Manager for this activity as well as WOCCU technical staff for the duration of the contract. Reports under this activity will be focused on disseminating information about the development of the security plan and the relevant protocols developed and their respective risk mitigation measures and triggers for escalation within the plan.

D. Deliverables

The selected candidate should be prepared to submit the following resources as deliverables under this opportunity:

- Project security assessment
- Project security plan, including event triggers, and office and travel worksite evacuation plans
- Country evacuation plan for expatriate staff
- All applicable supporting standards, guidance, procedures, and industry best practices

IV. Instructions for Technical Proposals

In order to be considered for evaluation, a proposal must abide by the requirements identified in this section and as established with RFP overall. Proposals that do not respond to the requirements identified in this section will not be reviewed by WOCCU's technical evaluation committee. In addition, proposals received after the submission deadline identified on the cover page of this solicitation will not be considered for evaluation. If this solicitation is amended, then all terms and conditions not modified in the amendment shall remain unchanged.

A. General Instructions

Proposals are due no later than June 6, 2022 5:00 pm EDT, to be submitted via email to consult@woccu.org. Please be sure to reference the RFP number of this solicitation (**EIP-H-2022-001**) in the subject line of the email. Late proposals will be rejected except under extraordinary circumstances at WOCCU's discretion. Technical proposals are limited to six pages, excluding staff CVs, work plans, and cover letters.

This solicitation in no way obligates WOCCU to contract with any offeror, nor does it commit WOCCU to pay any costs incurred in the preparation and submission of the bid. WOCCU reserves the right to vary any part of this solicitation at the time of selection if it becomes necessary. The submission to WOCCU of a proposal in response to this RFP will constitute an offer and indicates the firm's agreement to the terms and conditions in this RFP and any attachments hereto. WOCCU reserves the right not to evaluate a non-responsive or incomplete proposal.

B. Questions related to RFP

Requests for clarification or additional information must be submitted in writing via email to Victoria Ansarah (vansarah@woccu.org) by May 23, 2022. No questions will be answered by phone.

Copies of questions and responses will be distributed via email to all prospective bidders as well as posted as an amendment to this solicitation on WOCCU's career page.

C. Proposal Cover Letter

A cover letter shall be included with the proposal on the company letterhead with a duly authorized signature using Attachment A as a template. The proposal cover letter should be sure to include a reference to the RFP number of this solicitation, the total cost of the proposal, and certify the validity of **60 days** for the cost proposal included in the proposal.

D. Technical proposal requirements

In order to be considered for evaluation, the technical proposal for each firm should be sure to comply with the requirements set out in this section. Technical proposals should be sure to demonstrate the applicant's ability to complete the tasks described in **Section III, Part B** of this solicitation, or propose an alternative set of activities that will achieve the desired objective of this activity. Technical proposals are limited to six pages, excluding proposed staff CVs, work plan/Gantt chart, and the cover letter.

1. Technical Qualifications:

The technical proposal should include a narrative description of the firm's technical capacity to implement the tasks described in **Section III, Part B** and include a description of the proposed activities required to meet the project objective. The proposal should also include detailed descriptions of current or past relevant activities related to the identified tasks. The proposal may include as many projects as appropriate to demonstrate the full breadth of the firm's capabilities. This section of the proposal should detail the proposed approach to achieve the project objectives including a proposed set of activities, a description of the proposed technical team supporting the implementation, and a suggested schedule of services.

2. Personnel Description:

The technical proposal should include a narrative description of the proposed technical team qualifications including their experience in the field, language abilities, and proposed role within the project. This section should also be sure to identify the project lead and main point of contact from the firm. Individuals named in this section should provide a two-page (maximum) CV or bio page that demonstrates their experience as narrated in this section. Professional CVs are not included within the technical proposal page limit and should be included as attachments to the overall proposal.

3. Project Work Plan (not included in page limit):

The technical proposal should include a work plan in a Gantt chart format that details the narrative section of the technical qualifications section and identifies the recommended period of performance for this activity, responsible parties for completion or collaboration, and a breakdown of the activities by weeks or months as appropriate.

E. Cost proposal Requirements

The proposal should include a cost proposal or budget for the associated activity that corresponds to the technical narrative of the proposal. The budget will be reviewed based on criteria that evaluate cost reasonableness and applicability based upon the technical proposal. Budgets must be sufficiently detailed to demonstrate reasonableness and completeness. Applications including budget information determined to be unreasonable, incomplete, unnecessary for the completion of the proposed project, or based on a methodology that is not adequately supported may be deemed unacceptable.

V. Technical Evaluation

The following criteria will be used to evaluate each technical proposal. The number of points assigned to each criterion represents its weight in the evaluation process.

Technical Criteria	Weight
Technical Qualifications <ul style="list-style-type: none"> - Adequately demonstrates the firm's understanding of project objective - Provides a detailed work plan narrative that demonstrates the firm's ability to achieve project objective - A work plan that includes the recommended period of performance, responsible parties, and a breakdown of the activities by weeks or months as appropriate - Previous experience in managing activities related to those proposed in the solicitation 	50 pts
Personnel Qualifications <ul style="list-style-type: none"> - The relevance of staff's skills and experience in the proposed tasks - Spanish language abilities are integrated into the technical team and are clearly demonstrated - Technical staff CVs support personnel narrative, including clear demonstration of experience and abilities that support the technical narrative 	30 pts
Cost-Effectiveness	20 pts



<ul style="list-style-type: none">- Proposed costs reflect a clear understanding of the requirements stated in this RFP, and costs are reasonable- The proposed price is reasonable in comparison with prices with the independent cost estimate- Proposed planned costs ensure optimal delivery of the proposed activities- The budget demonstrates reasonableness and completeness based on the technical proposal	
TOTAL	100 pts

VI. Procurement Schedule

WOCCU will follow the outlined schedule for this RFP process. This schedule is subject to change, with such changes being made and posted via amended update through the WOCCU career page.

ACTIVITY	DATE
RFP posted to WOCCU career page	May 9, 2022
Questions due to WOCCU	May 23, 2022
RFP Closing/Proposals submitted	June 6, 2022
Review/Evaluation process	June 6, 2022 – June 20, 2022
Service provider selected	June 20, 2022

VII. Determinations

WOCCU will review all complete proposals that are received prior to the closing date of this solicitation and will make a determination based on the technical and cost evaluation criteria stated above and select the offeror whose proposal provides the best value to WOCCU. WOCCU may also exclude an offer from consideration if it determines that a proposal does not demonstrate a minimum level of experience or includes tasks that do not respond to the overall project objective. While proposals will be evaluated based on cost proposals received, WOCCU may select a higher-priced offeror if a determination is made that the higher technical evaluation of that offeror merits the additional cost and the proposal is determined to include reasonable costs related in the technical proposal.

A. Compliance Terms:

WOCCU will not enter into any type of agreement with a selected firm before confirming the following factors:

1. The source, origin, and nationality of the products or services are not from a Prohibited Country (explained below);

2. The bidder has adequate financial resources to finance and perform the work or deliver goods or the ability to obtain financial resources without receiving advance funds from WOCCU;
3. The bidder can comply with required or proposed delivery or performance schedules;
4. The bidder has a satisfactory past performance record and a satisfactory record of integrity and business ethics;
5. The bidder has the necessary organization, experience, accounting, and operational controls and technical skills;
6. The bidder is qualified and eligible to perform work under applicable laws and regulations; and
7. The bidder is in agreeance of applicable donor terms

B. Source and Nationality

Under the authorized geographic code for its contract, WOCCU may only procure goods and services from countries included in Geographic Code 937, as applicable.

Geographic Code 937 is defined as the United States, the cooperating country, and developing countries other than advanced developing countries, and excluding prohibited countries/sources.

A list of the "Developing Countries" as well as "Advanced Developing Countries" can be found at <http://www.usaid.gov/policy/ads/300/310maa.pdf> and <http://www.usaid.gov/policy/ads/300/310mab.pdf> respectively.

By submitting a proposal in response to this RFP, proposals confirm that they are not violating the source and nationality requirements of the goods or services being offered and that the goods and services comply with the geographic code and the exclusions for prohibited countries outlined above.

VIII. Disclaimer

This solicitation in no way obligates WOCCU to contract with any offeror, nor does it commit WOCCU to pay any costs incurred in the preparation and submission of the bid. WOCCU reserves the right to vary any part of this solicitation at the time of selection if it becomes necessary. WOCCU may cancel this solicitation or may reject any and all responses received. The issuance of this solicitation does not constitute contractual commitment by WOCCU.



ATTACHMENTS

Attachment A: Cover letter template format

[On Firm's Letterhead]

<Insert date>

TO: The World Council of Credit Unions, Economic Inclusion Project (EIP)

We, the undersigned, provide the attached proposal in accordance with **EIP-H-2022-001** issued on [DATE]. Our attached proposal is for the total price of <Sum in Words (\$0.00 Sum in Figures) >.

I certify a validity period of 60 days for the prices provided in the attached cost proposal. Our proposal shall be binding upon us subject to the modifications resulting from any discussions.

[Offeror shall detail here any items specified in this proposal that are relevant to evaluation review as deemed appropriate and necessary.]

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

Yours sincerely,

Authorized Signature:

Name and Title of Signatory:

Name of Firm:

Address:

Telephone:

Email:

Attachment B: Proposal Checklist

- ☐ Submitted to consult@woccu.org before the identified deadline
- ☐ Included signed proposal cover letter using the template provided
- ☐ Submitted technical proposal per solicitation requirements
- ☐ Submitted cost proposal
- ☐ Submitted required attachments – staff CVs, work plan, a professional portfolio, etc.