

TASK ORDER UNDER THE IDIQ (Task-Order 2)

Effective Date of the Task Order Subcontract (“Effective Date”)	8 August 2023
End Date of the Task Order Subcontract (“Term”)	7 August 2024
Subcontract Type:	Fixed Price Task Order Subcontract
Subcontract/Task Order Ceiling:	[\$723,388]

IDIQ-CATALYZE-217772-Sahel-2022-0249 Task Order 2

Instructions to Offerors

Separate technical and cost proposals must be submitted by email to us.catalyze.sahel@thepalladiumgroup.com no later than **July 10, 2023 (17h00 WAT/GMT +1)**

1. Technical Proposal

For the technical proposal, the offeror must submit:

- (a) MS Word document with 4-5 pages (**in English**):
 - a. **Technical Proposal** including a description of proposed activities and their expected results and how the work will help accomplish the objectives of this task order, as well as specific tasks and deliverables of this task order. Technical Proposal should also include a general framework for monitoring and evaluation of proposed activities that includes a data collection and data oversight/ management plan of the proposed activities (max 2 pages)
 - b. **Proposed Work Plan** showing how the firm would execute this project and scope of work in the task order including a timeline of the proposed activities (max 3 pages)

2. Cost Proposal

Offerors must submit a cost proposal. CATALYZE will provide a budget template upon request through us.catalyze.sahel@thepalladiumgroup.com. The cost proposal consists of:

- a. Budget in Microsoft Excel with all formulas visible (unlocked)
- b. Accompanying Budget Narrative in Microsoft Word with all cost assumptions and explanations in English

Key assumptions

- Budget must NOT exceed the Task Order 2 ceiling noted in the cover page.
- Budget should include two sets of columns to indicate estimated costs in both West African CFA Franc and USD, using \$1USD = 625 CFA exchange rate.
- All prices are to be inclusive of relevant taxes (please disaggregate)
- Separate unit cost and number of units
- Break down activity costs into as much detail as possible. A sample budget template is attached.
- Offeror should budget for: labor costs to complete tasks and deliverables listed in Scope of Work, travel to/from interviews, information sessions.

The offeror’s cost proposal will be evaluated for:

- Proposed total price, relative to other offers received.
- Realism and reasonableness of the work to be performed.
- Price reflects a clear understanding of the requirements.

- Price is consistent with various elements of the technical proposal.
- Compliance with USAID Cost Principles in FAR Part 31.

Submission of Offers

Electronic proposals must be submitted by sending two separate emails, one for technical proposal and one for cost proposal with the RFP number in the subject lines. Ensure all required documents are attached. The RFP number can be found on the cover page.

Offers received past the deadline stated on the cover page will be deemed non-responsive and will not be considered for award.

Scope of Work

2.1 ACTIVITY OBJECTIVE

The primary objective of the CATALYZE Finance for Resilience (F4R) Activity is to expand access to finance for enterprises and producers in targeted sectors and groups. F4R activities are designed to achieve this objective by 1) developing the network and capacity of local Financial Facilitators (FFs); and 2) prompting financial institutions (FIs) to increase access to finance. The CATALYZE F4R approach is to provide incentive payments to FFs and FIs upon securing finance for eligible enterprises. The F4R team also provides some capacity support to FFs in support of securing finance for their clients.

Between 2021-2022, F4R established the pay-for-results (P4R) network in Niger by recruiting and onboarding three FIs and 15 FFs, and has a pipeline of eight more FIs and five more FFs who have submitted their applications to join the CATALYZE P4R network. The Subcontractor will be responsible for supporting this network of P4R partners building on the foundation laid during that first phase. The selected Subcontractor will manage and monitor the implementation of the P4R incentives program by working with the F4R network of FIs to lend to agricultural producers, other agricultural value chain actors and SMEs, while also incentivizing FFs who link FIs and other sources of finance with the farmers, cooperatives, and enterprises in targeted regions and sectors seeking finance. In the context of this program, the FFs would be paid a fee they would negotiate with their client and would receive an additional incentive payment for successfully securing capital for clients eligible for the F4R award program (based on region, value chain, etc.).

2.2 SPECIFIC TASKS & DELIVERABLES (See SECTION 3.5 DELIVERABLES & ACCEPTANCE CRITERIA)

The subcontractor will continue fine-tuning of the F4R technical approach for effective implementation by providing technical leadership and oversight of the F4R activities in Niger. This will include managing the F4R network, supporting partner pipeline development, and transaction closing. The subcontractor will also collect data and report on the Activity's progress in mobilizing private capital that will serve as the basis for learning and review sessions that contribute to program design enhancement.

The subcontractor will help drive the F4R's adaptive management by providing insights and guidance that will shape future iterations of P4R incentives for FIs and FFs in Niger. As the subcontractor helps address the CATALYZE F4R development objectives they will ensure sound application of the most relevant information, knowledge, and experience in Niger. The subcontractor will also exchange information, ideas, and resources with the F4R team in Burkina Faso. Additionally, as the main technical implementing partner in Niger, the subcontractor will help advance the scaling of blended finance investments in support of development programming by sharing insights that feed into the overall CATALYZE Learning Agenda.

The subcontractor team shall perform the following tasks:

- I. Develop and carry out project implementation strategies that empower vulnerable groups and effectively promote the sharing of project learnings.
- II. Develop a network of Financial Intermediaries (FIs and FFs) and build their capacity to expand access to finance for enterprises and producers in targeted sectors and groups.
- III. Enhance and promote the supply of private financing to F4R focus groups and regions (FIs)
- IV. Provide technical assistance to support FFs in pipeline development + deal closure (FFs)
- V. Report and share learnings from activities I-IV above

Target Regions, Groups, and Value Chains:

Priority Target Regions	Maradi, Tillabery, and Zinder
Target Groups	Women, youth, smallholder farmers in target regions
Priority Target Value Chains	Cowpea, poultry, and small ruminants

Supplementary Target Regions	Agadez, Diffa, Dosso, Tahoua
Supplementary Target Value Chains	Moringa, Potatoes, Market Gardening, Beans, Cassava, Peanuts, Millet, Sesame, Peach, Livestock, Dairy processing, Onion, Beekeeping, Fish farming, Rice, Yellow nutsedge, Sorghum

[...]

3.5 DELIVERABLES SCHEDULE AND ACCEPTANCE CRITERIA

The Subcontractor shall submit the deliverables described in Sections 2.2 and 2.3 in accordance with the following deliverables schedule. The Company shall accept deliverables submitted within one week (7 days) of the below Due Dates.

No.	Deliverable	Required Documentation	Criteria for Acceptance (Sub-Activities)	Estimated Due Date (or timeline from TO1 Contract Start Date)	Units
1	Develop and finalize the CATALYE F4R Annual Work Plan for Fiscal Year 2024 in Niger	FY 2024 Annual Work Plan report (Word) and accompanying FY 2024 activity Gantt chart (Excel).	Responds to AMU and USAID further comments/questions. Compliant with USAID Branding & Marking regulations and guidelines.	30-September-2023	1 workplan
2	Develop a network of Financial Intermediaries (FIs and FFs) and build their capacity to expand access to finance for enterprises and producers in targeted sectors and groups.	Monthly Reports with detailed summaries and photos.	<p>Organization of technical meetings/trainings led by FIs for FFs and to RISE II partners.</p> <p>Required Documents: Summary of objectives, findings, and next actions for each meeting/training provided in monthly report with photos. Copies of agenda(s), handouts, guides, or other materials shared with participants.</p>	To be scheduled in collaboration with partners	4 meetings or trainings over the course of the year
			<p>Organization of networking activities (e.g. conferences, workshops, conferences, etc.) between FIs and FFs. (See Proposed Activity 2.3.3.)</p> <p>Required Documents: Summary of objectives, findings, and next actions for each activity provided in monthly report with photos. Copies of agenda(s), handouts, guides, or other materials shared with participants.</p>	To be scheduled in collaboration with network partners	3 activities
			<p>Performance evaluation framework developed and + six-month evaluation of partner FIs and FFs completed.</p> <p>Required Documents:</p>	December 15 2023, July 15 2024	2 partner evaluation reports

No.	Deliverable	Required Documentation	Criteria for Acceptance (Sub-Activities)	Estimated Due Date (or timeline from TO1 Contract Start Date)	Units
			Completed evaluation Excel sheets on FI and FF performance. Written recommendations to Palladium Grants and AMU team for modifying FI/FF contracts		
3	Enhance and promote the supply of private financing to F4R focus groups and regions (FIs)	Monthly Reports with detailed summaries and photos.	<p>Facilitation of Technical Assistance deliveries for FIs led by Yalwa and others (e.g. BYC, USADF, etc.)</p> <p>Required Documents: Summary of objectives, findings, and next actions for each instance of TA support provided in monthly report with photos. Copies of TA handouts, guides, other materials shared with FIs.</p>	To be scheduled in collaboration with partners	2 instances of TA to partners
			<p>Assistance/information verification trips to FI partners.</p> <p>Required Documents: Summary of objectives, findings, and next actions for each FI verification trip in monthly report with photos.</p>	To be scheduled in collaboration with partners	6 trips
4	Provide technical assistance to support FFs in pipeline development + deal closure (FFs)	Monthly Reports with detailed summaries and photos.	<p>One-week working session with the CATALYZE F4R Burkina Faso team in Ouagadougou</p> <p>Required Documents: Summary of objectives, findings, and next actions for each International trip to Burkina Faso in monthly report with photos.</p>	To be scheduled in collaboration with BF team	1 trip

No.	Deliverable	Required Documentation	Criteria for Acceptance (Sub-Activities)	Estimated Due Date (or timeline from TO1 Contract Start Date)	Units
			<p>Quarterly FF networking and Pause & Reflect meetings</p> <p>Required Documents: Summary of objectives, findings, and next actions for each meeting provided in monthly report with photos. Copies of agenda, handouts, guides, or other materials shared with participants.</p>	<p>Oct 15, 2023 Jan 15, 2024 Apr 10, 2024 Jul 10, 2024</p>	4
			<p>Quarterly Focus Group Discussions with FFs to discuss mobilization progress + stock take on TA needed</p> <p>Required Documents: Summary of objectives, findings, and next actions for each meeting provided in monthly report with photos. Copies of agenda, handouts, guides, or other materials shared with participants.</p>	<p>On or about Oct 15, 2023 Jan 15, 2024 Apr 10, 2024 Jul 10, 2024</p> <p>Final schedule to be agreed with partners</p>	4
			<p>Completed FF Trainings on financing Agricultural Value Chains</p> <p>Required Documents: Summary of objectives, findings, and next actions for each instance of TA support provided in monthly report with photos. Copies of TA handouts, guides, other materials shared with FIs.</p>	<p>To be scheduled as new batch of FFs are onboarded</p>	15 FFs trained
			<p>Assistance/verification trips to FF partners</p> <p>Required Documents: Summary of objectives, findings, and next actions for each trip provided in monthly report with photos.</p>	<p>As needed</p>	6 trips

No.	Deliverable	Required Documentation	Criteria for Acceptance (Sub-Activities)	Estimated Due Date (or timeline from TO1 Contract Start Date)	Units
			<p>Quarterly Focus Group Discussions with FFs + RISE II partners to discuss mobilization progress + stock take on TA needed</p> <p>Required Documents: Summary of objectives, findings, and next actions for each meeting provided in monthly report with photos.</p>	<p>On or about</p> <p>Oct 15, 2023 Jan 15, 2024 Apr 10, 2024 Jul 10, 2024</p> <p>Final schedule to be agreed with partners</p>	3
			<p>Trips to Yalwa to support producer unions</p> <p>Required Documents: Summary of objectives, findings, and next actions for each trip provided in monthly report with photos.</p>	As needed	At least 3 trips (ideally one in each region)
			<p>Trips to BYC to support youth groups</p> <p>Required Documents: Summary of objectives, findings, and next actions for each trip provided in monthly report with photos.</p>	As needed	At least 3 trips (ideally one in each region)
			<p>DO2 Activities Workshop</p> <p>Required Documents: Summary of objectives, findings, and next actions for each meeting provided in monthly report with photos. Copies of agenda, handouts, guides, or other materials shared with participants.</p>	To be scheduled by partners	2 Workshops

3.6 PAYMENT SCHEDULE

As consideration for the delivery of all of the products and/or services stipulated in Section 2, Palladium will pay the Subcontractor for successful completion of the fixed deliverables stated in the schedule of payments below upon acceptance by the Sahel F4R Activity Lead or Sahel F4R Project Manager of a single or group of deliverables.

No	Deliverable	Due Date	% of contract Total	Price
1	Develop and finalize the CATALYE F4R Annual Work Plan for Fiscal Year 2024 in Niger FY 2024 Annual Work Plan, Niger	30-Sep-23	5%	\$36,169
2	Develop and finalize the CATALYE F4R Annual Report for Fiscal Year 2023 in Niger FY 2023 Annual Report, Niger	15-Sep-23	5%	\$36,169
3	Develop and finalize the CATALYE F4R Final Activity Report for Niger Life of Activity Program Report, Niger	15-Jul-24	5%	\$36,169
4	Monthly Progress Report 1	30-Aug-23	3%	\$21,702
5	Monthly Progress Report 2	30-Sep-23	3%	\$21,702
6	Monthly Progress Report 3	30-Oct-23	3%	\$21,702
7	Monthly Progress Report 4	30-Nov-23	3%	\$21,702
8	Monthly Progress Report 5	30-Dec-23	3%	\$21,702
9	Monthly Progress Report 6	30-Jan-24	3%	\$21,702
10	Monthly Progress Report 7	28-Feb-24	3%	\$21,702
11	Monthly Progress Report 8	30-Mar-24	3%	\$21,702
12	Monthly Progress Report 9	30-Apr-24	3%	\$21,702
13	Monthly Progress Report 10	30-May-24	3%	\$21,702
14	Monthly Progress Report 11	30-Jun-24	3%	\$21,702
15	25% of FY24 target of indicator: Capital Mobilization Target Achieved (\$739,252)	10-Dec-23	5%	\$36,169
16	50% of FY24 target of indicator: Capital Mobilization Target Achieved (\$1,478,502)	10-Mar-24	5%	\$36,169
17	75% of FY24 target of indicator: Capital Mobilization Target Achieved (\$2,217,755)	10-Jun-24	5%	\$36,169
18	100% of FY24 target of indicator: Capital Mobilization Target Achieved (\$2,957,007)	10-Sep-24	7%	\$50,637
19	25% of FY24 target of indicator: Number of Entities Reached Achieved (238)	10-Dec-23	5%	\$36,169
20	50% of FY24 target of indicator: Number of Entities Reached Achieved (475)	10-Mar-24	5%	\$36,169
21	75% of FY24 target of indicator: Number of Entities Reached Achieved (713)	10-Jun-24	5%	\$36,169
22	100% of FY24 target of indicator: Number of Entities Reached Achieved (950)	10-Sep-24	7%	\$50,637
23	At least 70% of Financial Facilitators citing increased ability to network for improving access to finance for agriculture value chain actors and youth entrepreneurs as a result of involvement in the activity	10-Sep-24	4%	\$28,936
24	At least 60% of Financial Institutions citing increased ability to network for improving access to finance for agriculture value chain actors and youth entrepreneurs as a result of involvement in the activity	10-Sep-24	4%	\$28,936
Total			100%	\$723,388