



## Digital Frontiers

### Request for Proposals (RFP)

No. 2023-09

2024 Protecting Children and Youth From Digital Harm Symposium

Issue Date: June 16, 2023

WARNING: Prospective Offerors who have received this document from a source other than the [DigitalFrontiers@dai.com](mailto:DigitalFrontiers@dai.com) email address, should immediately contact [DigitalFrontiers@dai.com](mailto:DigitalFrontiers@dai.com) and provide their name and email address in order that amendments to the RFP or other communications can be sent directly to them. Any prospective Offeror who fails to contact [DigitalFrontiers@dai.com](mailto:DigitalFrontiers@dai.com) assumes complete responsibility in the event that they do not receive communications prior to the closing date. Any amendments to this solicitation, questions and answers, or other communications will be issued from [DigitalFrontiers@dai.com](mailto:DigitalFrontiers@dai.com)

## Table of Contents

<b>1. Introduction and Purpose .....</b>	<b>4</b>
1.1 Purpose.....	4
1.2 Issuing Office .....	4
1.3 Type of Award Anticipated.....	4
<b>2. General Instructions to Offerors .....</b>	<b>4</b>
2.1 General Instructions .....	4
2.2 Proposal Cover Letter .....	4
2.3 Questions regarding the RFP.....	4
<b>3. Instructions for the Preparation of Technical Proposals .....</b>	<b>5</b>
3.1 Services Specified .....	5
3.2 Technical Evaluation Criteria .....	5
<b>4. Instructions for the Preparation of Cost Proposals .....</b>	<b>6</b>
4.1 Cost Proposals .....	6
4.2 Budget Narrative .....	6
<b>5. Basis of Award.....</b>	<b>6</b>
5.1 Best Value Determination .....	6
5.2 Responsibility Determination.....	6
<b>6. Inspection &amp; Acceptance .....</b>	<b>7</b>
<b>7. Compliance with Terms and Conditions.....</b>	<b>7</b>
7.1 General Terms and Conditions .....	7
7.2 Prohibited Technology .....	7
7.3 Source and Nationality .....	7
7.4 US Government Registrations.....	7
7.5 Fly America Act .....	8
<b>8. Procurement Ethics.....</b>	<b>8</b>
<b>9. Attachments .....</b>	<b>9</b>
9.1 Attachment A: Scope of Work for Services .....	9
9.2 Attachment B: Proposal Cover Letter .....	13
9.3 Attachment C: Budget and Budget Narrative Template .....	14
9.4 Attachment D: Instructions for Obtaining a CAGE/NCAGE Code, SAM Registration, and UEI.....	15
9.5 Attachment E: Past Performance Table Template .....	17
9.6 Attachment F: Representations and Certifications of Compliance .....	19
9.7 Attachment G: Financial Capacity Questionnaire .....	20
9.8 Attachment H: Proposal Checklist .....	19

**Synopsis of the RFP**

RFP No.	2023-09
Issue Date	June 16, 2023
Title	2024 Protecting Children and Youth from Digital Harm Symposium
Issuing Office & Email	Digital Frontiers c/o DAI, <a href="mailto:DigitalFrontiers@dai.com">DigitalFrontiers@dai.com</a>
Deadline for Receipt of Questions	June 23, 2023, 5pm EST, to <a href="mailto:DigitalFrontiers@dai.com">DigitalFrontiers@dai.com</a>
Deadline for Receipt of Proposals	July 14, 2023, 5pm EST time, to <a href="mailto:DigitalFrontiers@dai.com">DigitalFrontiers@dai.com</a>
Point of Contact	<a href="mailto:DigitalFrontiers@dai.com">DigitalFrontiers@dai.com</a>
Anticipated Award Type	Firm Fixed Price
Basis for Award	An award will be made based on the <b>Trade Off Method</b> . The award will be issued to the responsible and reasonable offeror who provides the best value to DAI and its client using a combination of technical and cost/price factors.

## 1. Introduction and Purpose

### 1.1 Purpose

DAI, the implementer of the USAID-funded Digital Frontiers program, invites qualified offerors to submit proposals to support Digital Frontiers and USAID in planning and facilitating of the 2024 Child Protection from Digital Harm virtual conference.

### 1.2 Issuing Office

The Issuing Office and Contact Person noted in the above synopsis is the sole point of contact at DAI for purposes of this RFP. Any prospective offeror who fails to register their interest with [DigitalFrontiers@dai.com](mailto:DigitalFrontiers@dai.com) assumes complete responsibility if they do not receive direct communications (amendments, answers to questions, etc.) prior to the closing date.

### 1.3 Type of Award Anticipated

DAI anticipates awarding one (1) Firm Fixed Price contract no greater than \$100,000. The contracting mechanism applied is subject to change during negotiations.

A Firm Fixed Price Contract is: An award for a total firm fixed price, for the provision of specific services, goods, or deliverables and is not adjusted if the actual costs are higher or lower than the fixed price amount. Offerors are expected to include all costs, direct and indirect, into their total proposed price.

## 2. General Instructions to Offerors

### 2.1 General Instructions

“Offeror”, “Contractor”, and/or “Bidder” means a firm proposing the work under this RFP. “Offer” and/or “Proposal” means the package of documents the firm submits to propose the work.

Offerors wishing to respond to this RFP must submit proposals, in English, in accordance with the following instructions. Offerors are required to review all instructions and specifications contained in this RFP. Failure to do so will be at the Offeror’s risk. If the solicitation is amended, then all terms and conditions not modified in the amendment shall remain unchanged.

Issuance of this RFP in no way obligates DAI to award a contract or purchase order. Offerors will not be reimbursed for any costs associated with the preparation or submission of their proposal. DAI shall in no case be responsible for or liable for these costs.

Proposals are due no later than **July 14, 2023 at 5pm EST**, to be submitted via email to [DigitalFrontiers@dai.com](mailto:DigitalFrontiers@dai.com). Please include the RFP number (2023-09) in the subject line of the email. Late offers will be rejected except under extraordinary circumstances at DAI’s discretion. Technical proposals are limited to **three (3) to five (5) pages (excluding supporting documents detailed below)**.

The submission to DAI of a proposal in response to this RFP will constitute an offer and indicates the Offeror’s agreement to the terms and conditions in this RFP and any attachments hereto. DAI reserves the right not to evaluate a non-responsive or incomplete proposal.

### 2.2 Proposal Cover Letter

A cover letter shall be included with the proposal on the Offeror’s company letterhead with a duly authorized signature using Attachment B as a template for the format. The cover letter shall include the following items:

- The Offeror will certify a validity period of **90 days** for the prices provided.
- Acknowledge the solicitation amendments received.

### 2.3 Questions Regarding the RFP

Each Offeror is responsible for reading and complying with the terms and conditions of this RFP. Requests for clarification or additional information must be submitted in writing via email to [DigitalFrontiers@dai.com](mailto:DigitalFrontiers@dai.com) by **June 23, 2023 at 5pm EST time**. No questions will be answered by phone. Any verbal information received from a DAI or Digital Frontiers employee or other entity shall not be considered as an official response to any question regarding this RFP.

Copies of questions and responses will be distributed via email to all prospective bidders who are on record as having received this RFP after the submission date specified in the Synopsis above.

### 3. Instructions for the Preparation of Technical Proposals

Technical proposals shall be in a separate attachment from cost proposals and shall be clearly labeled as “VOLUME I: TECHNICAL PROPOSAL”. Technical proposals are limited to **five (5) to ten (10) pages**, excluding personnel CVs, past performance matrix, and cover letter.

Technical proposals shall include the following contents:

#### 1. Technical Qualifications

- Explanation of how the Offeror will achieve the tasks specified in Attachment A: Scope of Work;
- Workplan, demonstrating the approach, sequence, and management components involved in providing the services described in Attachment A;
- Demonstration of Offeror’s capacity and experience to implement the approach proposed;
- Offeror adheres to the minimum qualifications included in Attachment A: Scope of Work.

#### 2. Personnel Plan and Qualifications

- Personnel Plan that includes titles and job responsibilities of proposed team, demonstrating ability to successfully achieve selected tasks from SOW;
- CVs or bios of proposed personnel that demonstrate the minimum qualifications included in Attachment A: Scope of Work;

#### 3. Past Performance

- The Offeror should provide at least 3 past relevant project examples in past performance matrix per the template in Attachment E along with and References and visual examples;

#### 3.1 Services Specified

For this RFP, DAI is in need of the services described in Attachment A.

#### 3.2 Technical Evaluation Criteria

All offers that meet the proposal requirements will be reviewed by the review panel.

Awards will be made based on the ranking of applications by the review panel according to the evaluation criteria and scoring system identified below:

Criteria	Evaluation Sub-criteria	Maximum Points
Technical Approach and Capacity	<ul style="list-style-type: none"> <li>• Proposed approach is creative and demonstrates deep understanding of the specified tasks;</li> <li>• Technical approach demonstrates the offeror's capacity to successfully complete all required deliverables while incorporating client feedback &amp; respecting deadlines.</li> <li>• Offeror demonstrates the institutional capacity to plan and facilitate large virtual events.</li> </ul>	6
Personnel Plan and Qualifications	<ul style="list-style-type: none"> <li>• Proposed personnel demonstrate an ability to successfully achieve outlined tasks stated in Attachment A.</li> <li>• Personnel plan demonstrates sound and efficient methodology of coordinating and managing proposed personnel in satisfying the needs of the USAID client, DAI, and external actors.</li> <li>• Proposed personnel meet the relevant qualifications outlined in Attachment A.</li> </ul>	3
Past Performance	<ul style="list-style-type: none"> <li>• Offeror has a record of positive past performance (at least three references)</li> <li>• Included references demonstrate direct relevance to the tasks and requirements outlined in Attachment A.</li> </ul>	9
<b>Total:</b>		<b>18</b>

#### 4. Instructions for the Preparation of Cost Proposals

##### 4.1 Cost Proposals

Cost proposals shall be in a separate attachment from technical proposals and shall be clearly labeled as "VOLUME II: COST PROPOSAL".

Offerors should use their previous experience and knowledge to inform a cost proposal that reflecting unit prices reasonable for the local market. Per 2 CFR 700.13, for-profit Offerors must exclude profit from cost proposals, as this activity is a contracted subaward issued via an assistance mechanism.

Provided in Attachment C is a template for the cost proposal. Offerors shall complete the template including as much detailed information as possible. The Contractor is responsible for all applicable taxes and fees, as prescribed under the applicable laws for income, compensation, permits, licenses, and other taxes and fees due as required.

##### 4.2 Budget Narrative

The budget must have an accompanying budget narrative and justification that provides in detail the estimated costs for implementation of the SOW in Attachment A. The combination of the cost data and narrative must be sufficient to allow a determination of whether the costs estimated are reasonable. A budget narrative template is included in Attachment C.

##### 4.3 Financial Capacity Questionnaire

Offerors must complete the Financial Capacity Questionnaire included in Attachment G. The responses to these questionnaire are confidential and will only be used to determine the offeror's responsibility to implement the subaward.

#### 5. Basis of Award

##### 5.1 Best Value Determination

DAI will review all proposals, and make an award based on the technical and cost evaluation criteria stated above and select the offeror whose proposal provides the best value to DAI. DAI may also exclude an offer from consideration if it determines that an Offeror is "not responsible", i.e., that it does not have the management and financial capabilities required to perform the work required.

**Evaluation points will not be awarded for cost.** Cost will primarily be evaluated for realism and reasonableness. DAI 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. Alternatively, a lower priced proposal may be selected in lieu a higher scoring technical proposal, should cost savings be identified as the best means to deliver value for money to the initiative.

DAI may award to an Offeror without discussions. Therefore, the initial offer **must contain the Offeror's best price and technical terms.**

##### 5.2 Responsibility Determination

DAI will not enter into any type of agreement with an Offeror prior to ensuring the Offeror's responsibility. When assessing an Offeror's responsibility, the following factors are taken into consideration:

1. Evidence of a UEI number, CAGE/NCAGE code, and SAM.gov registration (explained below and instructions contained in Attachment D).
2. The source, origin and nationality of the products or services are not from a Prohibited Country (explained below).
3. Offeror 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 DAI.
4. Ability to comply with required or proposed delivery or performance schedules.
5. A satisfactory past performance record.
6. A satisfactory record of integrity and business ethics.
7. Offeror has the necessary organization, experience, accounting and operational controls and technical skills.
8. Is qualified and eligible to perform work under applicable laws and regulations.

## 6. Inspection & Acceptance

The designated DAI Project Manager will inspect from time to time the services being performed to determine whether the activities are being performed in a satisfactory manner, and that all equipment or supplies are of acceptable quality and standards. The contractor shall be responsible for any countermeasures or corrective action, within the scope of this RFP, which may be required by the DAI Project Director as a result of such inspection.

## 7. Compliance with Terms and Conditions

### 7.1 General Terms and Conditions

Offerors agree to comply with the general terms and conditions for an award resulting from this RFP. The selected Offeror shall comply with all Representations and Certifications of Compliance listed in Attachment F.

### 7.2 Prohibited Technology

Offerors MUST NOT provide any goods and/or services that utilize telecommunications and video surveillance products from the following companies: Huawei Technologies Company, ZTE Corporation, Hytera Communications Corporation, Hangzhou Hikvision Digital Technology Company, or Dahua Technology Company, or any subsidiary or affiliate thereof, in compliance with 2 CFR 200.216.

### 7.3 Source and Nationality

DAI must verify the source and nationality of goods and services and ensure (to the fullest extent possible) that DAI does not procure any goods or services from prohibited countries listed by the Office of Foreign Assets Control (OFAC) as sanctioned countries. OFAC sanctioned countries may be searched within the System for Award Management (SAM) at [www.SAM.gov](http://www.SAM.gov). The current list of countries under comprehensive sanctions include: Cuba, Iran, North Korea, Sudan, and Syria. Goods may not transit through or be assembled in comprehensive sanctioned origin or nationality countries nor can the vendor be owned or controlled by a prohibited country. DAI is prohibited from facilitating any transaction by a third party if that transaction would be prohibited if performed by DAI.

By submitting a proposal in response to this RFP, Offerors 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 exclusions for prohibited countries outlined above.

Under the authorized geographic code for its agreement DAI may only procure goods and services from the following countries. DAI **will not** seek a waiver to these requirements if selected Offeror is registered in a country outside of Geographic Code 937.

**Geographic Code 937:** Goods and services from the United States, the cooperating country, and "Developing Countries" other than "Advanced Developing Countries: excluding prohibited countries. 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.

### 7.4 US Government Registrations

There is a **mandatory** requirement for your organization to provide evidence of the following registrations to DAI prior to being awarded an agreement. Without registering in the required databases, DAI cannot deem an Offeror "responsible" to conduct business with and therefore, DAI will not enter into a contract or monetary agreement with any organization. The determination of a successful offeror/applicant resulting from this RFP is contingent upon the winner providing a UEI number, CAGE/NCAGE Code, and evidence of SAM.gov registration to DAI. Offerors who fail to provide these will not receive an award and DAI will select an alternate Offeror.

- Offerors need to obtain the following before award of an agreement:
  - UEI Number
  - Registration with SAM
  - CAGE/NCAGE

For detailed information on registration in the above USG databases, see Attachment D - Instructions for Obtaining CAGE/NCAGE Code, SAM Registration, and UEI Number

### Restricted/Sanctioned Groups or Individuals

U.S. Executive Orders and U.S. law prohibit transactions with, and the provisions of resources and support to, individuals and organizations associated with terrorism. These requirements apply to Vendor/Subcontractor. No material support or resources may be provided to individuals or entities that appear on the following lists<sup>1</sup>:

- a. Office of Foreign Assets Control (OFAC) (Department of Treasury) Sanctions List: <https://sanctionssearch.ofac.treas.gov/>
- b. OFAC's List of Specially Designated Nationals (SDN) and Blocked Persons, and the database formerly known as EPLS, now searchable at [www.sam.gov](http://www.sam.gov)
- c. Consolidated United Nations Security Council Sanctions List, available at <https://www.un.org/sc/suborg/en/sanctions/un-sc-consolidated-list>

The term "material support" includes "any property, tangible or intangible, or service, including currency or monetary instruments or financial securities, financial services, lodging, training, expert advice or assistance, safehouses, false documentation or identification, communications equipment, facilities, weapons, lethal substances, explosives, personnel, and transportation, except medicine or religious materials."

Please note that the following are included in the list of sanctioned entities:

- Fuerzas Armadas Revolucionarias de Colombia (FARC)
- FARC Communes/Political Party
- The National Liberation Army (ELN) (Colombia and Venezuela)
- Shining Path (SL) (Peru)

Further information is available at:

<https://www.state.gov/j/ct/rls/other/des/122570.htm>

<https://www.treasury.gov/resource-center/sanctions/Programs/Documents/terror.pdf>

### 7.5 Fly America Act

The contractor must comply with Fly America Act restrictions for all international travel under this award.

## 8. Procurement Ethics

Neither payment nor preference shall be made by either the Offeror, or by any DAI staff, in an attempt to affect the results of the award. DAI treats all reports of possible fraud/abuse very seriously. Acts of fraud or corruption will not be tolerated, and DAI employees and/or contractors/subgrantees/vendors who engage in such activities will face serious consequences. Any such practice constitutes an unethical, illegal, and corrupt practice and either the Offeror or the DAI staff may report violations to DAI's Ethics Hotline at +1-503-597-4328, [Ethics@dai.com](mailto:Ethics@dai.com), or [www.dai.ethicspoint.com](http://www.dai.ethicspoint.com). DAI ensures anonymity and an unbiased, serious review and treatment of the information provided. Such practice may result in the cancellation of the procurement and disqualification of the Offeror's participation in this, and future, procurements. Violators will be reported to USAID, and as a result, may be reported to the U.S. Department of Justice to be included in a Restricted Parties list, preventing them from participating in future U.S. Government business.

Offerors must provide full, accurate and complete information in response to this solicitation. The penalty for materially false responses is prescribed in Section 1001 of Title 18 of the United States Code.

In addition, DAI takes the payment of USAID funds to pay Terrorists, or groups supporting Terrorists, or other parties in exchange for protection very seriously. Should the Terrorist, groups or other parties attempt to extort/demand payment from your organization you are asked to immediately report the incident to DAI's Ethics and Compliance Anonymous Hotline at the contacts described in this clause.

By submitting an offeror, offerors certify that they have not/will not attempt to bribe or make any payments to DAI employees in return for preference, nor have any payments with Terrorists, or groups supporting Terrorists, been attempted.



## 9. Attachments

### 9.1 Attachment A: Scope of Work for Services: 2024 Protecting Children and Youth from Digital Harm Symposium

#### OBJECTIVE

USAID and DAI are planning the second bi-annual Protecting Children and Youth from Digital Harm Symposium in February 2024 to provide a forum to share and discuss the challenges facing children and youth in digital ecosystems and the work being done to protect children and youth from digital harm. It will include a focus on increasing strategic participation among the donor community, implementing partners, youth, USAID partner countries and sector stakeholders based in emerging markets.

In 2022, USAID and DAI hosted a one-day virtual Symposium that brought together leaders in government, civil society, the private sector, and youth to bring awareness to the risks that children and youth face in the digital space. The Symposium explored topics related to digital inclusion, digital empowerment, and existing protection strategies, and discussed the evolving roles of governments and the technology sector. The Symposium also featured discussions with USAID's Digital Youth Council Cohort 1 members and highlighted their perspectives on challenges such as online sexual violence, hate speech, and cyberbullying. Throughout the day, 546 attendees from 100 countries attended the 24 sessions.

For the Protecting Children and Youth Symposium in 2024, USAID and DAI will amplify local voices, local problems and solutions from the field. The Symposium will highlight youth voices from USAID's Digital Youth Council Cohort 1 and Cohort 2. The symposium will be a 8-16 hour , virtual event in English aimed at the international donor community, USG staff and implementing partners, USAID partner countries, and grassroots organizations. Panels and guest speakers may include those within and outside of the USG, implementing partners, NGOs, and members from the USAID International Digital Youth Council. The symposium seeks to accommodate guests from all geographic regions, including viewers from other time zones. Because of this, all sessions will be recorded and will be stored on the pre-existing Children in Adversity website after the conclusion of the event.

Digital Frontiers seeks an organization to be responsible for the technical content of the conference (in collaboration with USAID, a technical advisor, and the steering committee), implementation of the virtual conference (to include identifying a virtual platform and managing event logistics), as well as post event follow-up. The vendor will procure a platform, design, and oversee a virtual event platform that includes live and recorded sessions and multiple simultaneous breakout room capabilities. They will work with USAID and DAI stakeholders to coach speakers and ensure high quality of prepared content and presentations. Technical expertise in the child and youth protection space is not required but is preferred.

#### BACKGROUND

In April 2020, USAID released its first-ever [Digital Strategy](#). The Strategy charts an Agency-wide vision for development and humanitarian assistance in the world's rapidly evolving digital landscape. The Strategy's goal is to achieve and sustain open, secure, and inclusive digital ecosystems that contribute to broad-based, measurable development, and humanitarian assistance outcomes. USAID's Digital Strategy has two core, mutually reinforcing objectives: 1) improve measurable development and humanitarian assistance outcomes through the responsible use of digital technology in USAID's programming; and 2) strengthen the openness, inclusiveness, and security of country-level digital ecosystems.

Digital Frontiers is a \$90 million buy-in mechanism available to USAID Bureaus and Missions from 2017-2024. DAI implements the Digital Frontiers project, which works closely with USAID's Development, Democracy, and Innovations (DDI) Bureau; the Technology Unit within the Innovations, Technology, and Research Hub (ITR/T); USAID missions; the private sector; civil society organizations; and international and local development organizations to identify successful and sustainable digital development approaches and scale their impact globally. Digital Frontiers played a key role in supporting the development and launch of the Digital Strategy and continues to play an integral role in its implementation.

USAID, through the Digital Strategy's Protecting Children and Youth from Digital Harm initiative, seeks to harness technology and new digital innovations to better support children, their communities and their governments towards sustainable development, while simultaneously safeguarding children from potential harm. Digital harm encompasses a wide range of increasingly abusive practices against children who access information and communication technology (ICT), including the internet. Digital harm includes online bullying, harassment, and humiliation; access to harmful and pornographic images and content; distributing or possessing child pornography; the coercion for children to share compromising and pornographic photos of themselves; and grooming and abuse of children for online sex abuse and trafficking. It also includes targeting and stopping those adults who use digital technology to exploit and abuse children.

## TASKS

The Protecting Children and Youth from Digital Harm Symposium Organizer will provide technical as well as project management support to design and develop Protecting Children and Youth from Digital Harm Symposium 2024. The partner is expected to provide technical guidance and direction on the goals, agenda, and speakers for the Symposium. The Organizer will also lead the virtual event coordination and implementation. Specific tasks that the Organizer is responsible for include:

### *1. Pre-Conference Tasks*

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- Develop a detailed work plan;
- Develop a detailed agenda using youth, digital harm and digital development technical expertise, run of show, and session planning templates;
- Work with DAI, USAID, and key stakeholders, including USAID Technical Advisor, to secure keynote speakers and other session leads/presenters;
- Coordinate and schedule regular meetings, including setting and sending out agendas, facilitating meetings, and sending out action items and taskers as follow-up, with DAI, USAID, and all stakeholders;
- Coordinate and substantively contribute to the technical design process of the event, including helping USAID and DAI to brainstorm on ideas for panels, sessions, lightening talks, etc relevant to digital harm, digital development, youth and children. Offeror will be expected to mobilize requisite digital and youth expertise during this phase;
- Assist/Lead in reaching out and finalizing speaker (with DAI approval);
- Work with USAID and DAI stakeholders to coach speakers and ensure consistent high quality of prepared content and presentations;
- Compile master slide deck for overall event/individual panels and sessions, this should cover 8-16 hours of content;
- Develop and maintain a virtual conference platform for the event to house registration links, pre-conference materials, live video sessions, and recorded videos;
- Coordinate and manage any pre-recorded sessions for the event;
- Design participation engagement elements such as polls, Q&As, etc. to track and record participation engagement;
- Provide project and virtual logistics management for the event planning and execution including platform and website management and technical support to ensure that all components of the event are implemented smoothly;
- Create a design and communications plan to support and facilitate the event, which includes: social media and marketing plan for promoting the Symposium, style guide for the symposium, and all resources produced to promote the symposium as well as an engagement plan that highlights potential opportunities for locally-based engagements approved by DAI and USAID (if funds permit). Please see the deliverable table for more details on the communication plan components.
- Coordinate participant registration and maintain an active list.
- Produce pre-recorded session/lightning talk videos that will be shown during the day of the conference. Production includes filming and editing of the videos. Videos must be filmed in a studio with professional grade camera, audio, and lighting equipment. Please see the deliverable table for more details on the minimum video specifications.

## 2. During Conference Tasks

- Attend, coordinate, and run the Protecting Children and Youth from Digital Harm Symposium event;
- For each session, provide sign language translation and CC captioning (in English, French and Spanish, at least)
- Manage the technology and communications during the conference;
- Facilitate Conference sessions as needed/relevant;
- Troubleshoot technical challenges promptly with sufficient resources prepared in advance.
- Record sessions in any current and most recent file formats (MP4, AVI, MOV, F4V, WMV, MKV, AVCHD, etc.).

## 3. Post Conference Tasks

- Follow up communications based on communications plan;
- Produce edited short videos for each session.
  - Final videos should include sign language interpretation and closed captioning in English, Spanish and French.
  - Final videos must meet the following requirements
    - All online training content developed must be [SCORM](#) 1.2 compliant
    - All content must run on the agency PC standard configuration with agency approved software
    - All content must not require Adobe Flash Player to run
    - All content must be section 508 compliant
    - All content must follow USAID branding guidelines
    - All content packages must be no larger than 250MB in size
    - All content packages must not contain outside references to content (player, video, image, or other media references)
    - A sample video should be submitted to test the compliance with the USAID learning platform
- Work with Children in Adversity website vendor to post videos to existing website;
- Provide a final attendance list that includes: all participant names, contact information, and organization (including USAID).

## PROGRAM DELIVERABLES

Upon award, the contractor will be expected to deliver the following according to the approximate schedule assuming an August 2023 start date:

DELIVERABLES	TIMELINE
Workplan	September 2023
<b>Communications &amp; Engagement plan:</b> social media plan, marketing plan, style guide for the conference, participant engagement tracking, and style guide for the conference as well as an engagement plan that highlights potential opportunities for locally-based engagement approved by DAI and USAID (if funds permit).	October 2023
<b>Final Symposium Agenda:</b> Detailed event agenda (public agenda & internal run of show) to include list of speakers, and session descriptions.	December 2023
<b>Speaker selection &amp; prep:</b> Speaker outreach and confirmations, speaker prep for the sessions, gathering their bios & pictures and other materials for the Symposium, develop session prep templates and run-of-shows.	January 2024

<b>Symposium materials:</b> <ul style="list-style-type: none"> <li>• Master slide deck for overall event including the individual panels and sessions</li> <li>• Promotional materials for the Symposium</li> <li>• Minimum of 5-quality, pre-recorded videos, each up to 10 minutes in length, recorded in a professional studio with sound engineers, teleprompter, professional sound system, and professional studio lighting, in house technical production team (sound engineer, visual editor, producer, and such), with approved upon branding guidance and talking points. Include post-record editing and at least 2 round of video revisions.</li> </ul>	January 2024
<b>Final set-up of live conference platform for the event</b> which houses registration links, pre-conference materials, live video sessions, and recorded videos for sessions.	January 2024
<b>Final post-conference report</b> that includes attendance list including participant names, contact information, and organizations, recorded sessions (with Close Captions), and detailing conference success stories and technical challenges.	March 2024
<b>Overall project management:</b> Action-items of weekly check-in calls to discuss milestones and progress updates (including check-in call agenda, meeting notes and follow up action items)	Throughout period of performance

## PERIOD OF PERFORMANCE

The expected period of performance for this activity is August 2023 – March 2024.

## PROJECT MANAGEMENT

- The firm must propose a project manager from their organization to serve as the primary point of contact for USAID and Digital Frontiers.
- The firm will report to the Digital Frontiers Digital Strategy Project Manager Ellen Galdava. The firm collaborates closely with USAID staff and technical advisors .

## MINIMUM QUALIFICATIONS

- Be located in Washington D.C. area;
- Has previously implemented mid- scale (100-200 people or larger) virtual events and managed diverse aspects include speaker line ups, agendas, troubleshooting technical aspects, managing across time zones;
- Experience writing and implementing communications plans;
- Ability to coach symposium speakers;
- Implemented virtual, in-person or hybrid events for USAID or other USG agencies;
- Professional client engagement and management skills and ability to be flexible and quickly meet various client requests;
- Strong attention to detail in helping various stakeholders meet timelines and honor commitments;
- Strong public speaking ability in event that ad hoc event facilitation is necessary;
- Have teleprompter, professional sound system, and professional studio lightning;
- Have studio space big enough to fit 2-3 speakers at the same time (for recording 2-3 people);
- Have in house technical production team (sound engineer, visual editor, producer, and such) on the premises during the recording day;
- Technical capacity to record a conversation between two high level USAID speakers;
- Demonstrate recent successful application of USAID branding as a virtual background;
- Have prior experience working with USAID (please provide at least one example of demonstrated experience of working with USAID);
- Experience working in digital development, international development, digital harm, digital risks or related topics
- Experience working in designing conferences, symposiums, events for children and youth.

## 9.2 [Attachment B: Proposal Cover Letter](#)

[On Firm's Letterhead]

<Insert date>

TO: [Click here to enter text.](#)  
DAI Global, LLC

We, the undersigned, provide the attached proposal in accordance with **RFP 2023-09** issued on June 16, 2023. Our attached proposal is for the total price of <Sum in Words (\$0.00 Sum in Figures) >.

I certify a validity period of 90 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 verify here the items specified in this RFP document.*

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

Yours sincerely,

Authorized Signature:

Name and Title of Signatory: [Click here to enter text.](#)

Name of Firm: [Click here to enter text.](#)

Address: [Click here to enter text.](#)

Telephone: [Click here to enter text.](#)

Email: [Click here to enter text.](#)

### 9.3 Attachment C: Budget and Budget Narrative Template

	Name	Rate	LOE/Units	Unit Type	Cost
<b>I. Salaries and Wages</b>					
Person 1	TBD	\$0.00	0		\$0
Person 2	TBD	\$0.00	0		\$0
<b>Total Salaries and Wages</b>			<b>0</b>		<b>\$0</b>
<b>II. Indirect Costs on Labor</b>					
Fringe (full-time employees)					\$0
Overhead on Labor					\$0
<b>Total Indirect Costs on Labor</b>					<b>\$0</b>
<b>III. Other Direct Costs</b>					
Communications		\$0.00	0		\$0
Other (DESCRIBE)		\$0.00	0		\$0
<b>Total Other Direct Costs</b>					<b>\$0</b>
<b>Total Program Expenses</b>					<b>\$0</b>
<b>Indirect Costs on All Costs</b>			<b>0</b>		<b>\$0</b>
<b>Grand Total</b>					<b>\$0</b>

The following narrative follows the format of the budget. *Firm Name* has priced its proposal on a: Firm Fixed Price basis. Per 2 CFR 700.13, for-profit Offerors must exclude profit from cost proposals, as this activity is a contracted subaward issued via an assistance mechanism.

#### Salaries and Wages

For our labor cost estimates, we have used the daily rates for personnel, as supported by actual salaries and/or prevailing labor rates (please explain and provide justification or backup for rates).

- Name, Title proposed for a total of XX days at a daily rate of \$XXX.
- Name, Title proposed for a total of XX days at a daily rate of \$XXX.
- Name, Title proposed for a total of XX days at a daily rate of \$XXX.
- Name, Title proposed for a total of XX days at a daily rate of \$XXX.

Level of Effort (LoE) allocations should be accompanied with brief technical justifications describing each position's roles and responsibilities (and requisite LoE) for each of the Tasks outlined in Attachment A.

#### Other Direct Costs

This category includes basic support costs for the project such as XXXX (Explain and provide backup for costs). Included within this cost category are all costs necessary for the successful operation of this activity. Offerors should use their previous experience and knowledge to recommend the number of convenings within the budget. A variety of convenings (sizes, lengths, and virtual verse in-person) should be included in costs.

#### Indirect Costs on All Costs

All indirect costs must be in accordance with the Firm's policies (explain and provide justification).

## 9.4 Attachment D: Instructions for Obtaining a CAGE/NCAGE Code, SAM Registration, and UEI Number

### Background:

#### Summary of Current U.S. Government Requirements

There are mandatory requirements for Contractors to obtain the following items/registration before a contract of any kind can be awarded. Without registering in the required databases, DAI cannot deem an Offeror to be “responsible” to conduct business with and therefore, DAI will not enter into an agreement with any such organization. The award of an IQC or Task Order contract resulting from this RFP is contingent upon the winner providing a UEI number, a CAGE/NCAGE code, and proof of registration in the SAM.gov system. Organizations who fail to provide these will not receive an agreement and DAI will select an alternate Offeror.

#### CAGE/NCAGE Code

The Commercial and Government Entity (CAGE) Code was established by the US. The NATO Codification System developed the NATO Commercial and Government Entity (NCAGE) Code. When a business/organization is assigned a CAGE/NCAGE, they are in fact the same type/structure of code but identifies which nation or if the NATO Support Agency assigned the CAGE/NCAGE.

- Link to the CAGE/NCAGE Code request:  
<https://eportal.nspa.nato.int/AC135Public/scage/CageList.aspx>
- Link to CAGE/NCAGE code request instructions:  
<https://eportal.nspa.nato.int/AC135Public/Docs/US%20Instructions%20for%20NSPA%20NCAGE.pdf>

#### System for Award Management (SAM) Registration

You must have an active registration with [www.SAM.gov](http://www.SAM.gov) to do business with the Federal Government. To register in SAM, at a minimum, you will need the following information:

- U.S. Registrants:
  - 1) Your Legal Business Name and Physical Address
  - 2) Your Taxpayer Identification Number (TIN) and Taxpayer Name associated with your TIN; Review your tax documents from the IRS (such as a 1099 or W-2 form) to find your Taxpayer Name
  - 3) Your bank's routing number, your bank account number, and your bank account type, i.e. checking or savings, to set up Electronic Funds Transfer (EFT)
- International Registrants:
  - 1) Your NATO Commercial and Government Entity (NCAGE) Code

Follow this link to create a Sam.gov user account and register your organization:

<https://sam.gov/content/entity-registration>

#### Unique Entity ID (UEI)

On April 4, 2022, the federal government transitioned away from the DUNS Number to the new Unique Entity ID (SAM), or ‘UEI,’ for entity identification of federal awards government-wide. Entity identification in federal awards (grants, loans, contracts, etc.) means a unique set of numbers and letters used to identify every entity seeking to do business with the federal government. Currently, and through April 3, 2022, the federal government uses the DUNS Number, assigned by Dun & Bradstreet. On April 4, 2022 and moving forward, the federal government will use the Unique Entity ID (SAM), or “UEI” assigned by SAM.gov.

#### For new entities:

- Prior to starting entity validation process, an entity should be prepared with documents that: (1) shows the entity's legal business name and physical address in the same document and is less than 5 years old; (2) shows the legal business name and start year in the same document; and, (3) shows legal business name and US state of Incorporation (for US entities) or National Identifier (for non-US entities).

If any documents are in a language other than English, they must be accompanied by certified translations (see the link below for more details).

- This GSA guide has detail on documentation requirements. It includes a downloadable document outlining what type of documentation is acceptable, general guidelines, and guidance on translations.
- Additionally there is a general FAQ also maintained by GSA.

If, after entering the required information, an entity receives a validation error message and/or is not a match with any of the returned potential matches, the entity should create an incident. There are two new, useful videos that GSA has recently published to help explain this process. These are different than the brief overview video that has been previously shared, so projects and partners are encouraged to watch:

- This video provides a detailed, step-by-step walk through of the entity validation process. Be advised the scenario it addresses is for an existing entity that has to update some information (rather than a new entity, which is the case for most of our partners), but the steps are the same: <https://www.youtube.com/watch?v=ZKc9UfxtOIA> (the “create incident portion” runs from 27:58 to 35:05).
- This video provides guidance on how to manage the validation ticket once it has been submitted: <https://www.youtube.com/watch?v=a3nPZvnPpE0> (the “managing your validation ticket” portion runs from 17:34 to 28:55).

Entities need to regularly check their email – including spam folders – after they have submitted the incident report for emails from [fsdsupport@gsa.gov](mailto:fsdsupport@gsa.gov). They should be able to look up the status either by logging into their user account on SAM.gov (go to the “Workspace” view and click the “View” button under the Incident Report Number) or in [fsd.gov](http://fsd.gov) (directions on how to do this can be found here). Entities can communicate with an EVS (Entity Validation System) agent in [FSD.gov](http://FSD.gov) or by responding to the email. If the entity is unable to generate an incident report for some reason (this was a problem we saw this past week), the entity can also go to [FSD.gov](http://FSD.gov) and start a chat with an agent by clicking on the “live chat” button in the lower right-hand corner. Agents are available from 8AM to 8PM EST.

Once they are contacted by the EVS agent, the entity will have 5 days to respond, or the incident report will be automatically closed and they will have to start again. If the entity needs more time, they should respond to the EVS agent and communicate this. If the ticket is closed, when the entity starts a new one they should include the original ticket number in the Comments Section. Requested documents need to be uploaded at [sam.gov](http://sam.gov), not at [fsd.gov](http://fsd.gov). Once the FSD agent has confirmed the entity has been validated, the entity is not done! It will need to go back to SAM.gov to enter its information again and select the current, correct entity info. This step must be done in order to generate the UEID.



## 9.5 Attachment E: Past Performance Table Template

Include projects that best illustrate your work experience relevant to this RFP, sorted by decreasing order of completion date.

Projects should have been undertaken in the past three years. Projects undertaken in the past six years may be taken into consideration at the discretion of the evaluation committee.

#	Project Title	Description of Activities	Reference(s) Name, email and/or phone	Client Name and Address	Cost in US\$	Start-End Dates	Problem(s) Encountered and Resolutions
1							
2							
3							
4							
5							

## 9.6 Attachment F: Representations and Certifications of Compliance

1. Federal Excluded Parties List - The Bidder Select is not presently debarred, suspended, or determined ineligible for an award of a contract by any Federal agency.
2. Executive Compensation Certification- DAI, as prime contractor of U.S. federal government contracts, reports compensation levels of the five most highly compensated subcontractor executives to the Federal Funding Accountability and Transparency Act Sub-Award Report System (FSRS)
3. Executive Order on Terrorism Financing- The Contractor is reminded that U.S. Executive Orders and U.S. law prohibits transactions with, and the provision of resources and support to, individuals and organizations associated with terrorism. It is the legal responsibility of the Contractor/Recipient to ensure compliance with these Executive Orders and laws. Recipients may not engage with, or provide resources or support to, individuals and organizations associated with terrorism. No support or resources may be provided to individuals or entities that appear on the Specially Designated Nationals and Blocked persons List maintained by the US Treasury (online at [www.SAM.gov](http://www.SAM.gov)) or the United Nations Security Designation List (online at: [http://www.un.org/sc/committees/1267/aq\\_sanctions\\_list.shtml](http://www.un.org/sc/committees/1267/aq_sanctions_list.shtml)). This provision must be included in all subcontracts/sub awards issued under this Contract.
4. Trafficking of Persons – The Contractor may not traffic in persons (as defined in the Protocol to Prevent, Suppress, and Punish Trafficking of persons, especially Women and Children, supplementing the UN Convention against Transnational Organized Crime), procure commercial sex, and use forced labor during the period of this award.
5. Organizational Conflict of Interest –The Bidder certifies that is not aware of any information bearing on the existence of any potential organizational conflict of interest. The Bidder further certifies that if the Bidder becomes aware of information bearing on whether a potential conflict may exist, that Bidder shall immediately provide DAI with a disclosure statement describing this information.
6. Business Size and Classification(s) – The Bidder certifies that is has accurately and completely identified its business size and classification(s).
7. Equal Opportunity – The Bidder certifies that it does not discriminate against any employee or applicant for employment because of age, sex, religion, handicap, race, creed, color or national origin.
8. Labor Laws – The Bidder certifies that it is in compliance with all labor laws..
9. Employee Compliance – The Bidder warrants that it will require all employees, entities and individuals providing services in connection with the performance of an DAI Purchase Order to comply with the provisions of the resulting Purchase Order and with all Federal, State, and local laws and regulations in connection with the work associated therein.

By submitting a proposal, offerors agree to fully comply with the terms and conditions above and all applicable U.S. federal government clauses included herein, and will be asked to sign these Representations and Certifications upon award.

Accounting System and Financial Capability Questionnaire

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**For DAI Assistance Recipients**

The main purpose of this questionnaire is to understand the systems adopted by your institution for financial oversight and accounting of grant funds, especially those provided through the U.S. Federal Government. The questionnaire will assist DAI program and accounting staff to identify the extent to which your institution's financial systems match the requirements of the U.S. Federal Government. This information will help the program staff work with you and your institution to review any problem areas that may be identified; thereby avoiding any problems or oversights which would be reportable should an audit of the program or institution be required.

The questionnaire should be completed by the financial officer of your institution in collaboration with DAI program staff. This questionnaire is informational only, and will not have any bearing on the agreement to support your institution based on the technical merit of the application. Therefore, please answer all questions to the best of your knowledge.

While 2 CFR 200 does not cover awards to non-U.S. recipients, DAI shall rely on the standards established in that regulation in determining whether potential non-U.S. recipients are responsible to manage Federal funds. A determination shall be made on the potential recipient's ability, or potential ability, to comply with the following USAID and federal-wide policies:

- 1) [2 CFR 200 Subpart D](#) (Financial and Program Management);
- 2) [2 CFR 200 Subpart D](#) (Property Standards);
- 3) [2 CFR 200 Subpart D](#) (Procurement Standards); and
- 4) [2 CFR 200 Subpart D](#) (Performance and Financial Monitoring and Reporting).

## SECTION A: General Information

Please complete this section which provides general information on your institution.

Name of Institution: \_\_\_\_\_

Name and Title of Financial Contact Person: \_\_\_\_\_

Name of Person Filling out Questionnaire: \_\_\_\_\_

Mailing Address: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Street Address (if different) \_\_\_\_\_

\_\_\_\_\_

Telephone, Fax, Email (if applicable) \_\_\_\_\_

Enter the beginning and ending dates of your institution's fiscal year:

From: (Month, Day) \_\_\_\_\_ To: (Month, Day) \_\_\_\_\_

## SECTION B: Internal Controls

Internal controls are procedures which ensure that: 1) financial transactions are approved by an authorized individual and are consistent with U.S. laws, regulations and your institution's policies; 2) assets are maintained safely and controlled; and 3) accounting records are complete, accurate and maintained on a consistent basis. Please complete the following questions concerning your institution's internal controls.

1. Does your institution maintain a record of how much time employees spend on different projects or activities?

Yes: ☐

No: ☐

2. If yes, how?

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3. Are timesheets kept for each paid employee?

Yes: ☐

No: ☐

4. Do you maintain an employment letter or contract which includes the employee's salary?

Yes: ☐

No: ☐

4. Do you maintain inventory records for your institution's equipment?

Yes: ☐

No: ☐ (if no, explain)

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5. How often do you check actual inventory against inventory records?

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6. Are all financial transactions approved by an appropriate official?

Yes: ☐

No: ☐

7. The person responsible for approving financial transactions is: \_\_\_\_\_ Title: \_\_\_\_\_

8. Is the person(s) responsible for approving transactions familiar with U.S. Federal Cost principles as described in OMB Circular A-122?

Yes: ☐

No: ☐

9. Does your institution use a payment voucher system or some other procedure for the documentation of approval by an appropriate official?

Yes: ☐

No: ☐

10. Does your institution require supporting documentation (such as original receipts) prior to payment for expenditures?

Yes: ☐

No: ☐

11. Does your institution require that such documentation be maintained over a period of time?

Yes: ☐

No: ☐

If yes, how long are such records kept? \_\_\_\_\_

12. Are different individuals within your institution responsible for approving, disbursing, and accounting of transactions?

Yes: ☐

No: ☐

13. Are the functions of checking the accuracy of your accounts and the daily recording of accounting data performed by different individuals?

Yes: ☐

No: ☐

14. Who would be responsible for financial reports? \_\_\_\_\_

## SECTION C: Fund Control and Accounting Systems

Fund Control essentially means that access to bank accounts and/or other cash assets is limited to authorized individuals. Bank balances should be reconciled periodically to the accounting records. If cash cannot be maintained in a bank, it is very important to have strict controls over its maintenance and disbursement.

An Accounting System accurately records all financial transactions, and ensures that these transactions are supported by documentation. Some institutions may have computerized accounting systems while others use a manual system to record each transaction in a ledger. In all cases, the expenditure of funds provided by the USAID-funded program must be properly authorized, used for the intended purpose, and recorded in an organized and consistent manner.

1. Does your institution maintain separate accounting of funds for different projects by:

Separate bank accounts: ☐

A fund accounting system: ☐

2. Will any cash from the grant funds be maintained outside a bank (in petty cash funds, etc.)?

Yes: ☐

No: ☐

If yes, please explain the amount of funds to be maintained, the purpose and person responsible for safeguarding these funds.

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4. If your institution doesn't have a bank account, how do you ensure that cash is maintained safely?

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5. Does your institution have written accounting policies and procedures?

Yes: ☐

No: ☐

6. How do you allocate costs that are “shared” by different funding sources, such as rent, utilities, etc.?

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7. Are your financial reports prepared on a:

Cash basis: ☐      Accrual basis: ☐

8. Is your institution's accounting system capable of recording transactions, including date, amount, and description?

Yes: ☐

No: ☐

9. Is your institution's accounting system capable of separating the receipts and payments of the grant from the receipts and payments of your institution's other activities?

Yes: ☐

No: ☐

10. Is your institution's accounting system capable of accumulating individual grant transactions according to budget categories in the approved budget?

Yes: ☐

No: ☐

10. Is your institution's accounting system designed to detect errors in a timely manner?



Yes: ☐

No: ☐

11. How will your institution make sure that budget categories and/or overall budget limits for the grant will not be exceeded?

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12. Are reconciliations between bank statements and accounting records performed monthly and reviewed by an appropriate individual?

Yes: ☐

No: ☐

13. Briefly describe your institution's system for filing and keeping supporting documentation.

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#### SECTION D: Audit

The grant provisions require recipients to adhere to USAID regulations, including requirements to maintain records for a minimum of three years to make accounting records available for review by appropriate representatives of USAID or DAI, and, in some cases, may require an audit to be performed of your accounting records. Please provide the following information on prior audits of your institution.

1. Is someone in your institution familiar with U.S. government regulations concerning costs which can be charged to U.S. grants (OMB Circular A-122 "Cost Principles for Nonprofit Institutions" and OMB Circular A-110 "Uniform Administrative Requirements for Grants and Agreements with Institutions of Higher Education, Hospitals and Other Non-Profit Institutions")?

Yes: ☐

No: ☐

2. Do you anticipate that your institution will have other sources of U.S. government funds during the period of this grant agreement?

Yes: ☐

No: ☐

3. Have external accountants ever performed an audit of your institution's financial statements?

Yes: ☐

No: ☐

If yes, please provide a copy of your most recent report.

4. Does your institution have regular audits?

Yes: ☐

No: ☐

If yes, who performs the audit and how frequently is it performed?

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5. If you do not have a current audit of your financial statements, please provide this office with a copy of the following financial statements, if available:

- a. A "Balance Sheet" for the most current and previous year; and
- b. An "Income Statement" for the most current and previous year.

6. Are there any circumstances that would prevent your institution from obtaining an audit?

Yes: ☐

No: ☐

If yes, please provide details:

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## CHECKLIST AND SIGNATURE PAGE

DAI requests that your institution submit a number of documents along with this completed questionnaire. Complete this page to ensure that all requested information has been included.

### Complete the checklist:

- ☐ Copy of your organization's most recent audit is attached.
- ☐ If no recent audit, a "Balance Sheet" "Income Statement" for the most current and previous fiscal year.
- ☐ All questions have been fully answered.
- ☐ An authorized individual has signed and dated this page.

### Optional:

- ☐ Incorporation Papers or Certificate of Registration and Statute is attached.
- ☐ Information describing your institution is attached.
- ☐ Organizational chart, if available is attached (if applicable).

The Financial Capability Questionnaire must be signed and dated by an authorized person who has either completed or reviewed the form.

Approved by:

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Print Name

\_\_\_\_\_

Signature

\_\_\_\_\_

Title

Date \_\_\_\_\_

## 9.8 Attachment H: Proposal Checklist

Offeror: \_\_\_\_\_

### Have you?

- ☐ Submitted your proposal to [DigitalFrontiers@dai.com](mailto:DigitalFrontiers@dai.com) as specified in General Instructions above?
- ☐ Submitted Separate Technical and Cost proposal email attachments?

### Does your proposal include the following?

- ☐ Signed Cover Letter (*use template in Attachment B*)
- ☐ Technical Proposal not exceeding ten (10) pages
- ☐ Technical Proposal contains Gantt format workplan
- ☐ Technical Proposal contains Personnel plan
- ☐ Past Performance Matrix (*use template in Attachment E*) with references and links to visual examples
- ☐ CVs/bios of Team lead and staff
- ☐ Cost Proposal including budget and budget narrative (*use templates in Attachment C*)
- ☐ Financial Capacity Questionnaire is completed and included