



Subject: Request for Proposals: InterMedia Financial Inclusion Survey in Myanmar

Date Issued: 30 May 2017
Deadline for Questions: 2 June 2017 by 5:00pm U.S. Eastern Time
Deadline for Proposals: 9 June 2017 by 5:00pm U.S. Eastern Time

Attention Prospective Offerors:

InterMedia Survey Institute (“InterMedia”) requires the technical services of one subcontractor to perform a nationally representative household survey in Myanmar. InterMedia works in collaboration with the Consultative Group to Assist the Poor (CGAP) to develop innovative solutions through practical research to advance financial inclusion.

This procurement is being conducted through full and open competition. Proposals will be accepted from qualified research firms, both for profit and nonprofit. InterMedia anticipates the award of one subcontract to accomplish the purposes described in the RFP. InterMedia provides no guarantee that any subcontract will be awarded.

Please refer to Sections B and C for information regarding proposal requirements. Offerors are responsible to ensure that electronic versions of the proposal packages are received by InterMedia by the due date and time as specified above. Failure to comply with the submission date and time will deem any submission unacceptable and it will not be reviewed or evaluated. Faxed proposals are not acceptable, nor will they be reviewed or evaluated. Section D states the criteria by which proposals will be evaluated.

All questions related to the RFP must be submitted to FIIbids@intermedia.org on the date and time indicated above. Unless otherwise notified by an amendment to the RFP, no questions will be accepted after this date.

This RFP in no way obligates InterMedia to award a subcontract nor does it commit InterMedia to pay any cost incurred in the preparation and submission of a proposal. Award of any subcontract(s) under this RFP is subject to availability of funds and approval of the Funder.

Sincerely,

//_____//

Attachment: Request For Proposals: InterMedia Financial Inclusion Survey in Myanmar



REQUEST FOR PROPOSALS: INTERMEDIA FINANCIAL INCLUSION SURVEY IN MYANMAR

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SCHEDULE

InterMedia requires the technical services of one subcontractor to perform a nationally representative household survey in Myanmar. InterMedia invites research firms with local expertise, staff, and experience to propose to implement a computer-assisted personal interviewing (CAPI)-based survey in Myanmar. Offerors are invited to submit a best-price proposal for the work to be accomplished in partnership with InterMedia. To qualify for the award of a subcontract, an Offeror must have working office and staff in Myanmar prior to the submission of a proposal.

- I. **Type of Subcontract** – Any award resulting from this RFP will be a Fixed Price Subcontract valid for one wave of research only.
- II. **Submission of Questions** – All questions regarding the RFP must be submitted no later than 2 June 2017 (5:00 pm U.S. Eastern Standard Time) via e-mail to: FIIbids@intermedia.org. No questions will be answered over the phone or in person; all questions must be submitted via email to the address provided. Responses to questions raised by any single Offeror will be shared and made publicly available to all prospective Offerors on InterMedia’s website <<http://www.intermedia.org/rfp-financial-inclusion-survey-in-myanmar-intermedia>.> Answers to all questions submitted will be posted on the same webpage on 5 June 2017.
- III. **Submission of Proposals** – Proposals must be in English and delivered electronically to FIIbids@intermedia.org no later than 9 June 2017 (5:00 pm Eastern Standard Time). Only electronic submissions of proposals will be accepted under this RFP. Proposals must be received by the closing date and time indicated above. Offerors are responsible for ensuring timely delivery of proposals. Offerors must submit Technical and Cost Proposals as **separate attachments to the same e-mail**. The Technical Proposal will be reviewed in advance of any review of the Cost



Proposal in order to ensure that all submissions are technically sound and acceptable. A failure to respond appropriately to the technical specifications of this RFP will disqualify Offerors from review of their Cost Proposals or for consideration of award.

- IV. Offeror's Agreement with Terms and Conditions** – The complete submission of all requested items will constitute the offer. Failure or refusal to assent to any of the terms and conditions of this solicitation, imposition of additional conditions or any material omission may constitute a deficiency, which may make the proposal unacceptable, thereby eliminating the proposal from further consideration. InterMedia reserves the right to award a subcontract without discussion and/or negotiation; however, InterMedia also reserves the right to conduct discussions and/or negotiations, which, among other things, may require an Offeror to revise its proposal (Technical and/or Cost). Issuance of this RFP in no way obligates InterMedia to award a subcontract, nor does it commit InterMedia to pay any costs incurred by the Offeror in preparing and submitting the proposal.
- V. Compliance with RFP Instructions** – The Offeror is requested to submit a proposal that is directly responsive to the terms, conditions, specifications, and provisions of this RFP. Offerors are required to fully review all instructions and specifications contained in this RFP. Failure to do so will be at the Offeror's risk.

SECTION A: STATEMENT OF WORK

BACKGROUND

The Financial Inclusion Survey in Myanmar seeks to assess the level and nature of access to and use of financial services generally, and digital financial services particularly, throughout Myanmar.

METHODOLOGY

The Subcontractor will be responsible for implementing a nationally representative CAPI-based survey in Myanmar (N=3,000).

The survey sample will be designed and selected by InterMedia in collaboration with the Department of Population. The questionnaire will require approximately 60 minutes to administer. The Subcontractor will be responsible for the management and direct implementation of the survey, including logistical considerations, and dataset finalization.

The Subcontractor will be responsible for the following activities and must detail its approach to these activities in the Technical Proposal as outlined below:

1. Country-Specific Questionnaire Inputs

InterMedia will provide the Subcontractor with a questionnaire that requires limited country-specific inputs on the local financial products and service providers, including banks, mobile money providers and non-bank financial institutions including, but not limited to, micro-finance institutions and savings groups. The Subcontractor will assist with customizing demographic questions to ensure their contextual relevance, including country-specific education systems and main sources of income and employment. The Subcontractor also will be responsible for reviewing the questionnaire in terms of the cultural appropriateness of sensitive questions. Subcontractors must demonstrate knowledge of the financial services markets in Myanmar.

2. Translation of the Questionnaire

The Subcontractor will be responsible for translating the questionnaire into local languages, including, but not limited to Mon, Kachin, Kavin, and Shan. After completing the translation, the subcontractor will back-translate the questionnaire to English and provide a detailed report on the results (i.e., areas in which translations need further revision or consideration). Prospective Subcontractors should describe their process, capability, and experience with providing thorough and accurate translations in the Technical Proposal.

3. Scripting and Pretest of the Questionnaire

Subcontractors will be responsible for scripting the questionnaire or adapting a general script to one that is suitable for CAPI administration by the Subcontractor using the Subcontractor's devices. The scripting must be tested by InterMedia and the scripted survey questionnaire must be piloted in Myanmar before fieldwork begins. The CAPI testing phase includes the Subcontractor providing a dummy data set with a minimum 10,000 cases. Ample time (i.e., no less than two weeks) will be allowed for review and revisions on this dataset and a second dummy dataset if necessary.

The pretest will include approximately 100 interviews in urban and peri-urban areas using all the languages used in the survey. Within two days after the end of the pretest, the Subcontractor must provide a written report on the outcome of the pretest to InterMedia along with recommendations for changes to be made to the questionnaire. Any changes proposed to the questionnaire as a result of the pilot interviews must be approved by InterMedia. Competitive Technical Proposals will describe the Subcontractor's approach



to pretesting and how this approach will enhance the quality of the survey data.

4. Sampling Design

The Subcontractor will be responsible for submitting a detailed sampling design in writing to InterMedia prior to the fieldwork. The proposed sampling approach, to be included in the Technical Proposal, must describe how the Subcontractor will achieve nationally-representative results.

5. Fieldwork Plan

The Subcontractor will create a detailed plan for realizing the nationally representative sampling design with respect to all logistical and staffing arrangements

The fieldwork plan will provide details on when interviews will take place and which team of data collectors will complete interviews. This information will be used by InterMedia to organize monitoring activities using an independent quality control team that will be separately hired and managed by InterMedia.

A competitive Technical Proposal will describe how the fieldwork plan will be created from the sample design, identify challenges for fieldwork planning in the proposed countries, and describe how such challenges would be overcome.

6. Recruitment and Training

The Subcontractor will be responsible for the timely recruitment of qualified field teams, including interviewers and field supervisors. The Subcontractor must describe the composition of their proposed field team, including total numbers of interviewers and supervisors, regional allocation, as well as their recruitment process. A competitive Technical Proposal will provide clear explanation of how the Subcontractor will identify and evaluate the suitability of potential field staff, including local language fluency.

The Subcontractor also will be responsible for organizing, hosting, and handling all local logistical preparations for the training of field staff. A competitive Technical Proposal will describe a Subcontractor's approach to the training of field personnel. InterMedia will send a representative to observe the pre-fieldwork briefing, training, and/or parts of the fieldwork. In addition, the Subcontractor may be required to provide appropriate translation facilities.

7. Data Collection

Data collection will be conducted using CAPI and the Subcontractor is responsible for providing all devices and must ensure that devices are geo-enabled. Technical proposals must specify the number of devices that the Subcontractor will dedicate to survey implementation. Proposals must describe how the Subcontractor will ensure that all interviews are administered using devices that meet requirements in terms of specifications and battery life, as well as backup logistical arrangements in the field, including reserve power banks. GPS coordinates must be collected for all households where interviews take place. The Subcontractor must state that they understand and are able to fulfill this requirement in the Technical Proposal. The software used must enable InterMedia to maintain constant visibility over data collected in the field, although the Subcontractor is responsible for full day-to-day oversight and collection management. Competitive Technical Proposals will describe the Subcontractor's experience with implementing CAPI surveys (particularly in Myanmar), challenges that are likely to be encountered, and how the Subcontractor would overcome those challenges such that data quality is assured.

8. Coding and Data Processing

The Subcontractor will provide a fully-labeled SPSS file (both variables and values labeled in English). Guidelines for coding key variables in SPSS format will be shared by InterMedia upon commissioning.



The subcontractor must write an SPSS syntax to convert the raw data from CAPI to the format prescribed by the InterMedia-provided codebook. InterMedia expects that there will be no delays arising from data conversion throughout the life of the project. Competitive Technical Proposals will describe the Subcontractor's processes and timelines from data export to data delivery.

9. Dataset Finalization

The Subcontractor will send a test SPSS data set (i.e., dummy data) with all variables in their prescribed formats to InterMedia as soon as the CAPI codebook prescribed data structure has been established.

The Subcontractor will provide interim datasets complying with InterMedia's prescribed codebook at a mutually agreed-interval (no more frequent than biweekly). The Subcontractor will make any necessary revisions to the CAPI script or data structure following InterMedia's review of these interim datasets.

The Subcontractor will be responsible for the production and delivery of a cleaned final data sets in SPSS. The production of the final dataset will include three or more rounds of data checking and cleaning in close consultation with InterMedia data analysts to arrive at the final dataset(s) that passes all quality checks and is suitable for public dissemination. These checks involve item-by-item identification of errors and inconsistencies in the data identified in reports sent to the Subcontractor.

The Subcontractor will be responsible for working with the InterMedia team on addressing any issues raised in the data checking process and to complete the timely revision of datasets as needed. The Subcontractor will clean the data following the guidance provided in each data check report. Data checking will continue until the Subcontractor has satisfactorily resolved all errors and inconsistencies identified by InterMedia. Competitive Technical Proposals will describe the Subcontractor's data processing and cleaning capability and how the Subcontractor will undertake data cleaning such that data quality is assured.

10. Database of Respondents Willing to be Re-Contacted

The Subcontractor will establish, for possible future use, a database of respondents who have expressed a willingness to be re-contacted for participation in future research.

11. Technical Report

The Subcontractor will be required to provide InterMedia with a full technical report within two weeks of the completion of the final dataset. This report will follow a template to be provided by InterMedia.

QUALITY ASSURANCE AND CONTROL

The Subcontractor shall develop and maintain an effective quality assurance (QA) and quality control (QC) program to ensure high quality data.

Offerors shall submit a QA/QC plan as part of the Technical Proposal. The QA/QC plan must provide specific details on the quality assurance measures that will be taken before, during and after data collection.

STAFFING PLAN AND OPERATIONAL CONSIDERATIONS

The Subcontractor will be responsible for arranging and paying for all logistics related to in-country training, data collection, and data cleaning including, but not limited to, lodging, office space, meeting spaces, internet access, equipment, vehicle rentals, security, and drivers and all payments related to their own individual staff and supervisors. InterMedia will not be involved in any disputes between field personnel and the Offeror's management team. Offerors must ensure that the necessary payments are provided to field by agreed upon field dates. All expenses for InterMedia staff will be borne by InterMedia.

WORKPLAN

Offerors must submit a detailed workplan, in Gantt chart form, with their Technical Proposal addressing

each of the above tasks and program deliverables. The Subcontractor’s responsibilities must be executed in adherence to the survey schedule with exception for unforeseen circumstances.

TASKS	TIMELINE
Go Ahead on Study	19 th June
Questionnaire contextualization	26 th June
CAPI Scripting Draft V1	3 rd July
Sampling and Fieldwork Plan	24 th July
CAPI Script V2	17 th July
Pretest completion and review	17 th July
Translations complete in CAPI script	31 st July
CAPI Script V3	14 th August
Field Briefing	28 th August
Final CAPI Script	28 th August
Pilots as part of field briefing	4 th September
Fieldwork/Data Collection	4 th September – 9 th October
Interim Data (SPSS 1 st 300 cases)	Est. 18 th September
SPSS Data 3,000 Cases	16 th October
SPSS Data 3,000 Cases (Post revision process)	13 th November
Technical Report	27 th November

DELIVERABLES

The contractor will provide to InterMedia with the following deliverables:

- A pre-test report detailing the issues and recommendations/suggestions for changes to the questionnaire;
- The final versions of the survey questionnaire in English and all local languages;
- A CAPI application of the questionnaire for testing and validation by InterMedia;
- A copy of the CAPI script as well as access to the database during fieldwork;
- A final clean survey data file in SPSS format according to the codebook that will be provided by InterMedia; and
- A full technical report based on the format and structure to be specified by InterMedia.

SECTION B: INSTRUCTIONS FOR PREPARATION OF THE TECHNICAL PROPOSAL

Technical Proposals must be written in English and submitted in searchable Adobe Acrobat portable document format (.pdf). The file should be clearly marked and submitted as follows: **Myanmar Financial Inclusion Study_ Offeror's Name_Technical Proposal (.pdf)**. There is no page limit for the Technical Proposal; however, the proposal should succinctly address the evaluation criteria.

A complete Technical Proposal will consist of components I-IV and the requested annexes assembled in **one** document:

- I. Cover Letter**
- II. Summary of Relevant Work Experience**
- III. Approach and Workplan**
- IV. Staffing Plan**

Annexes:

Annex A – Resumes of Proposed Key Personnel

Annex B – Past Performance Information

Specific details for the preparation of Technical Proposals are provided below:

I. Cover Letter – A cover letter must be submitted using the template provided in **Addendum A** (page 25 of this RFP).

II. Summary of Relevant Work Experience – Offerors must describe their company profile, including the organization's mission and objectives and work experience in India. The response must also detail the Offeror's ability to:

- Manage the implementation of quantitative survey research;
- Conduct social research studies with potentially sensitive questions;
- Perform rigorous and robust data quality checking and cleaning;
- Conduct data collection using CAPI software; and
- Conduct research focused on financial inclusion, mobile service provision, and mobile money (highly preferred).

III. Approach and Workplan – Offerors must submit their proposed approach and supporting activities for addressing the activities and outputs required by the SOW. This section must include the following subsections:

- 1. Proposed Methodology/Approach to the SOW:** The Offeror must detail its proposed approach to the tasking to be carried out in accordance with the SOW:
 - a. Review of the questionnaire for country-specific context and cultural appropriateness of sensitive questions;
 - b. Translation of the questionnaire into all required local languages;
 - c. Pretesting of the questionnaire and approach to enhance the quality of survey data;
 - d. Training interviewers to enhance the quality of survey data;
 - e. Sampling design;
 - f. A fieldwork plan for realizing the sampling design, identifying challenges for fieldwork planning, and describing mitigation strategies for addressing those challenges;
 - g. Recruitment and training qualified enumeration teams;



- h. Implementation of CAPI surveys in Myanmar, likely challenges to be encountered, and mitigation strategies for addressing those challenges;
- i. Production and delivery of a cleaned final dataset in SPSS; and
- j. Production and delivery of the final technical report for Myanmar.

2. **Workplan:** Offerors must submit a detailed workplan, in Gantt form, with their Technical Proposal addressing each of the SOW tasks and program deliverables.

IV. Staffing Plan – Offerors must describe the proposed technical and managerial team proposed for the implementation of the survey. A staffing plan should be submitted that summarizes the titles, names, and roles and responsibilities of proposed team members. Offerors must clarify how many current staff will be used, or how many additional staff may be needed. In addition, the Offeror should detail how new staff members will be mobilized and trained, and how long this will take.

Annexes (to be submitted as part of the Technical Proposal):

Annex A: Resumes of Proposed Key Personnel – Copies of resumes for any proposed key positions should be included as an annex to the Technical Proposal. If one individual fills more than one of these roles, please state this in the proposal. **Resumes must not exceed three pages per proposed team member.**

Annex B: Past Performance Information - Offerors must submit two to three (2-3) relevant past performance citations using the template provided in **Addendum B** (page 26 of this RFP) that outlines projects that best illustrate the Offeror’s work experience managing and implementing similar projects. Offerors may include more than three citations (please use additional pages as necessary). Citations should detail the following:

- Project Title
- Client Name
- Client Point of Contact Name and Telephone Number
- Total Project Cost
- Type of Agreement (e.g., subcontract, grant, purchase order (fixed price, cost reimbursable))
- Location/Place of Performance
- Project Start-End Dates
- Brief Description of Activities



SECTION C: INSTRUCTIONS FOR PREPARATION OF THE COST PROPOSAL

The Cost Proposal should consist of **two separate attachments**: I) a detailed cost breakdown in Excel with unlocked formulas and II) a budget narrative/justification and supplementary cost information. All files should be clearly marked and submitted as follows:

I) Myanmar Financial Inclusion Study_ *Offeror's Name*_Detailed Budget (.xls)

II) Myanmar Financial Inclusion Study_ *Offeror's Name*_Budget Narrative and Cost Information (.pdf)

There is no page limit for the Cost Proposal.

A complete Cost Proposal will consist of the following:

- I. Detailed Cost Breakdown** (Microsoft Excel file with unlocked formulas)
- II. Budget Narrative and Cost Information**

Specific details for the preparation of Cost Proposals are provided below:

I. Detailed Cost Breakdown – The detailed cost breakdown must be submitted in Excel with unlocked formulas. Excel spreadsheets for the cost proposals could be presented in the format each Offeror finds most suitable provided that the spreadsheets are presented in a legible format. A breakdown of summary prices in U.S. Dollars must be included that outlines labor costs per deliverable (by person and daily rate), costs of materials, training, production costs, overhead and other costs (e.g., ground/air transportation). This is required in order to determine cost reasonableness. Please note that the Offeror is responsible for all payments related to field implementation. InterMedia personnel do not carry or pay out revenue for legal reasons. Offeror is responsible for any/all costs in the execution of this project. Modifications are only considered when the scope of work changes or some catastrophic event that might otherwise hinder completion occurs. At that time, InterMedia will also need to work with the Funder to consider cost increases. Any necessary modifications will be subject to approval of the Funder.

II. Budget Narrative and Cost Information (assembled in one document)

a. Budget Narrative – Offerors must provide sufficient detail and justification for costs deemed necessary to accomplish the proposed survey implementation in India. Please provide detail and justification for significant items, including salaries, estimated travel expenses, and items that comprise materials and supplies.

b. Cost Information – The following supplementary cost information is to be submitted with the budget narrative in the same document in the following order:

- **Priced Deliverable and Payment Schedule** – Offerors must enter their U.S. prices using the template provided in **Addendum C** (page 27 of this RFP) for all specified deliverables. Price shall include all labor, other direct costs (materials, etc.), security, and overhead. The pricing schedule as outlined below is non-negotiable as it is tied to the Master Services Agreement issued to InterMedia by the Funder.

Offerors must provide a statement in their Cost Proposals that they accept and agree to the following pricing schedule:



- i. 20% on contract award
 - ii. 40% pre-training/implementation – this payment will be made once the training dates and plan are confirmed with the InterMedia Research Manager. This includes any authorization documentation required to conduct fieldwork in country (e.g., local government/ministry approvals, etc.)
 - iii. 25% on submission of data (clean and QC approved by InterMedia’s QC Supervisor)
 - iv. 15% final payment on receipt of approved technical report and all technical information.
- **NGO Registration or Business Registration (if applicable)** – The Offeror must submit a copy of the registration certificate documenting its NGO authorization to conduct work in-country. All for-profit firms must submit a copy of their business registration in order to have their proposal evaluated and considered for award.
 - **Audited Financial Statements** – Offerors must provide audited financial statements for the last two years certified by an independent public accountant. If the Offeror does not have audited financial statements, internal financial reports should be submitted.
 - **Financial Capability Questionnaire** – Offers must complete the financial capability questionnaire included as **Addendum D** (page 28 of this RFP).

SECTION D: EVALUATION CRITERIA

After the closing date stated in the RFP, each proposal submitted to InterMedia will be assessed on its technical merits and subsequently on its price. **The Technical Proposal is worth 70 points, while the Cost Proposal is worth 30 points.** The Technical Proposal will be evaluated against the following criteria:

TECHNICAL	POINTS TO CONSIDER	MAX POINTS
Overall Response	<ul style="list-style-type: none"> ● Completeness of the response ● Overall compliance with the RFP requirements 	5
Relevant Work Experience	<ul style="list-style-type: none"> ● Robust in-country staff and facilities ● Organizational experience with managing and implementing quantitative survey research projects of similar size, scope, and complexity ● Relevant expertise with managing and implementing relevant survey research projects in Myanmar <ul style="list-style-type: none"> ○ Experience is sufficiently detailed to enable an assessment of the Offerors knowledge of local service markets, fieldwork planning, and ability to mitigate any challenges ● Ability to conduct social science research studies with potential sensitive questions ● Experience conducting data collection using CAPI software ● Experience with research focused on financial inclusion, mobile service provision, and mobile money 	15
Proposed Methodology and Approach	<ul style="list-style-type: none"> ● The Offeror demonstrates strong understanding of the goals and methodology of the survey described in Section A: Scope of Work ● The Offeror demonstrates robust knowledge of the financial services markets in Myanmar. ● The Offeror’s capacity to provide thorough and accurate translations for the languages required ● Approach to recruitment of interviewers ● Quality of the approach to training ● Quality of the CAPI implementation plan and procedures for the registration of the GPS coordinates of every household survey ● The quality assurance/quality control plan that provides specific details on the QA/QC measures that will be taken during data collection, such as supervisor accompaniment, field reporting structures, and feedback and mechanisms that will allow for timely corrections of any problems identified in the field ● Quality of the data cleaning process ● Realistic description of constraints to implementation as well as tangible solutions to these constraints ● The workplan reflects an accurate understanding the activities involved in implementing a nationally representative survey and the duration of tasks associated with such activities 	25



Staffing Plan and Proposed Key Personnel	<ul style="list-style-type: none"> • Description of the technical and managerial resources selected for the project, including size of the team, positions, and roles and responsibilities • Ability of the Offeror to quickly and efficiently mobilize and train staff • CVs of key personnel that demonstrate depth of experience and relevant qualifications to perform the work 	20
Past Performance Information	<ul style="list-style-type: none"> • Examples of past performance/organization experience managing and implementing quantitative survey research projects of similar size, scope, and complexity 	5
TOTAL SCORE		70

The Cost Proposal will be evaluated against the following criteria:

FINANCIAL	POINTS TO CONSIDER	MAX POINTS
Overall Response	<ul style="list-style-type: none"> • Completeness of the response • Overall compliance with the RFP requirements 	5
Detailed Budget	<ul style="list-style-type: none"> • Accuracy with which proposed costs represent the most likely cost of performance. An assessment of cost realism will be performed to evaluate and verify the Offeror's understanding of the contract requirements described in the SOW • Presentation of any cost saving initiatives. InterMedia has implemented previous waves of survey research in India for the Funder and is aware of cost savings that can be made in the course of this work. • Reasonableness of proposed fees, including the ability of the Offeror to control costs and propose salary rates that align with the staffing plan and individual roles and responsibilities 	20
Financial Stability	<ul style="list-style-type: none"> • Offeror provides sufficient evidence of being in good financial standing 	5
TOTAL SCORE		30

The proposal with the best overall score based on technical merit and price will be recommended for award of Subcontract. InterMedia's evaluation panel will consist of select technical experts who will first evaluate each response for compliance with the Technical Proposal requirements of this RFP. Responses that are deemed to not meet all of the mandatory requirements will be considered non-compliant and removed from further consideration.



SECTION E: INTERMEDIA TERMS AND CONDITIONS

- 1) **Goods and/or Services.** The Subcontractor will provide the work, equipment, products, reports, and deliverables or other items (“Goods”) and/or perform the services (“Services”) specified in **Section A – Scope of Work**.
- 2) **Inspection and Acceptance.** InterMedia will evaluate the goods and services upon delivery for conformity with the specifications in the SOW. If InterMedia determines that any part of the Goods or the Services do not conform to the specifications, the Subcontractor will be notified and shall be given a reasonable period of time to ensure, at the Subcontractor’s own cost, that the quality, quantity and description of the Goods meet the specifications or that the Services have been correctly performed. If the Subcontractor fails to deliver Goods that conform to the quality, quantity and description of the specifications, or to perform the Services to the satisfaction of InterMedia within a reasonable time to be agreed between the parties, InterMedia may terminate this Subcontract. If so terminated, the Subcontractor agrees to refund any amounts previously received from InterMedia in connection with such non-conforming Goods or Services, within **ten (10) days** from the effective termination date.
- 3) **Goods & Services Specifications Changes.** The Subcontractor understands that there may be additions, deletions or other charges that may affect the purchase of Goods or the Services specifications during the Subcontract Term. Upon receiving InterMedia’s notice of any change through a written modification to the Subcontract, the Subcontractor will work in good faith to accommodate those changes to the applicable specifications. For any substantial change to the Goods or Services specifications, the Parties will negotiate in good faith for equitable adjustments to the payments made to the Subcontractor and the delivery schedule under **Section A**.
- 4) **Intangible Property.**
 - A) Intangible property (including all types of intellectual property) created or developed, or for which ownership was purchased, under the Subcontract (the “Works”), shall be titled to InterMedia. The Subcontractor hereby irrevocably and unconditionally assigns to InterMedia all right, title, and interest in and to all such Works. Works shall not be reproduced or disseminated, other than for the purposes of completing the tasks described in this Subcontract, without the express, written approval of a duly-authorized representative of InterMedia.
 - B) Ownership of all intangible property (including, without limitation, brands, trademarks, service marks, franchise rights, copyrights, rights in data, and other rights) created or developed or for which ownership was purchased by either Party before the Effective Date, or created or developed or for which ownership is purchased by either Party subsequent to such Date but not under this Subcontract and with non- Subcontract funds, shall be and remain that Party’s exclusive property at all times (“Proprietary IP”). The other Party shall receive rights in such Proprietary IP, if at all, only through separate written licensing agreements.
 - C) InterMedia shall be entitled to all intangible property and other proprietary rights including but not limited to patents, copyrights, and trademarks, with regard to products, or documents and other materials which are produced or prepared or collected in consequence of or in the course of the execution of this Subcontract. At InterMedia’s request, the Subcontractor shall take all necessary steps, execute all necessary documents and generally assist in securing such proprietary rights and transferring them to InterMedia in compliance with Funder rules, guidelines, and procedures governing patents and inventions, including but not limited to government-wide regulations issued by the U.S. Department of Commerce.



- 5) **Communications with Funder or Host Country Officials.** Except as otherwise approved by InterMedia, all communications (whether oral, written, or electronic) by the Subcontractor, its personnel, contractors, suppliers, and lower-tier subcontractors concerning or affecting performance of any aspect of the Subcontract, the Prime Award, and the Program, shall be made solely to InterMedia and not directly to the Funder or Host Country officials.
- 6) **Public Notices and Communications.**
 - A) Any public notices or communications by the Subcontractor to the public, and in particular to the mass media or any public forum whatsoever (including press, radio, television, cinema, internet, etc.) relating to this Subcontract shall be subject to prior authorization in writing by InterMedia. If InterMedia authorizes the Subcontractor to supply the public with information, the Subcontractor shall ensure that such information is provided accurately.
 - B) The Subcontractor shall not use the names or logos of InterMedia without the advance written consent of InterMedia. The Subcontractor shall not refer to its relationship with InterMedia or to the Subcontract without InterMedia's prior written approval.
- 7) **Sub-agreements.** The Subcontractor shall obtain the prior written approval of InterMedia for all lower-tier sub-agreements. The approval of InterMedia of a lower-tier sub-agreement shall not relieve the Subcontractor of any of its obligations under this Subcontract.
- 8) **Insurance.**
 - A) The Subcontractor is solely responsible for all applicable taxes, benefits, worker's compensation insurance or equivalent, health insurance, social insurance, all risk property insurance, comprehensive general liability insurance with financially sound and reputable insurance companies, and any other insurance as required under this Subcontract and/or applicable laws.
 - B) The Subcontractor warrants that it shall obtain and maintain adequate insurances against all risks in respect of (i) any property and any equipment used for the execution of this Subcontract. and/or purchased with Subcontract funds; and (ii) its General Indemnity obligations under Section 13 herein and any other indemnification obligations under this Subcontract.
 - C) The Subcontractor shall be solely liable for the loss or theft of, or damage to, any and all items purchased with Subcontract funds (including items in the possession of its lower-tier subcontractors), and, immediately upon any such loss, theft or damage, shall replace such items at its own expense. In addition, the Subcontractor shall be solely liable for the loss or theft of any Subcontract funds held in cash by the Subcontractor or any of its agents or lower-tier subcontractors and shall have no recourse to InterMedia or the Funder for any such loss or theft.
- 9) **Procurement and Property.**
 - A) The Subcontractor shall ensure that any procurement conducted using Subcontract funds utilizes transparent, fair, and competitive procurement policies and practices. The Subcontractor shall inform InterMedia about the policies and practices that it shall use to contract for goods and services under this Subcontract.
 - B) The Subcontractor shall not use Subcontract funds to (1) procure goods or services over US \$0 in transaction value without InterMedia prior approval, or (2) create or transfer ownership of intangible property (including, without limitation, copyrights, patents, trademarks, and other intellectual property) without InterMedia's prior approval in writing. Such approval will not be unreasonably withheld, but may be subject to certain conditions or reservation of certain rights.



- C) Title to property financed by the Funder under this Subcontract shall be held by InterMedia or if InterMedia so directs by another entity. The Subcontractor shall care and account for all property financed under the Subcontract, and shall ensure that such property shall be used solely to further program objectives. Upon project completion, the Subcontractor shall submit the program asset list, request prior approval on final disposition of property, and subsequently dispose of property as instructed by InterMedia in writing. Should the Subcontractor be approved to retain property purchased under the Subcontract, the property shall be used to further program objectives.

10) Invoicing and Payments.

- A) Invoices that do not strictly comply with the Subcontract will be returned for correction and resubmission.
If Subcontractor becomes aware of a duplicate payment or that InterMedia has otherwise overpaid, Subcontractor shall immediately notify InterMedia in writing and request instructions for handling the overpayment.

11) Independent Contractor.

- A) Notwithstanding normal award and administration processes and the provision of guidance by InterMedia program staff, the relationship between the Parties in implementing the program shall be that of an arm's length independent contractor rather than a servant or agent. The Parties do not intend to create any kind of joint venture, partnership, or other formal business relationship or association of any kind whatsoever. Nothing herein shall be construed to provide for the sharing of profits and losses arising out of or relating to the efforts of either or both Parties, except as may be specifically provided herein. The Subcontractor shall have no authority, whether express or implied, to purport to contract for or bind InterMedia in any manner or to any extent, and shall make clear to all third parties with which it deals that it has no such authority.
- B) The Subcontractor personnel, shall at all times be under Subcontractor's sole supervision, direction and control, and shall not be deemed to be InterMedia personnel for any purpose. Subcontractor is solely responsible for payment of all wages, salaries, and other amounts due or to become due to such personnel in connection with the Subcontract and for all reports and obligations to social security, income tax withholding, unemployment compensation, worker's compensation, and the like. The Subcontractor shall indemnify and hold InterMedia harmless against any claim or liability (including, without limitation, fines, penalties and reasonable attorney's and expert consultant fees and costs) resulting from the Subcontractor's failure to comply with the provisions of this Article.
- C) Subcontractor understands and acknowledges that performance of the Scope of Work may expose its employees to a variety of risks and dangers including, without limitation, disease or infection, acts of terrorism, hostage taking, other physical violence or threats to safety, theft, armed conflict, or civil unrest. These risks could result in injury, illness, temporary or permanent disability, property or financial loss, psychological trauma, or death. Subcontractor agrees that it will take full responsibility for its employees who are performing Services under this Subcontract and that its employees have agreed to undertake any assignment under this Subcontract voluntarily, and with full knowledge of its risks and dangers. Subcontractor further agrees that it will:
 - i) take full personal responsibility for its employees' safety, security and health;
 - ii) freely assume all risk of harm to or loss of health, life or property for its employees;
 - iii) release and forever discharge InterMedia (including its directors, officers, employees, agents and insurers) from any and all costs, claims, losses, damages, or liability of any nature arising in connection with any injury, illness, physical or mental trauma, property or financial loss, disability or death Subcontractor's employees may suffer as a result of performance of the



Scope of Work for InterMedia; and

- iv) secure from each of its employees performing Services under the Subcontract a written release and discharge forever of InterMedia (including its directors, officers, employees, agents and insurers) from any and all costs, claims, losses, damages, or liability of any nature arising in connection with any injury, illness, physical or mental trauma, property or financial loss, disability or death Subcontractor's employees may suffer as a result of performance of the Services for InterMedia.

12) Notice of Conditions Interfering with Performance. The Subcontractor shall notify InterMedia in writing, within ten (10) days of the date the Subcontractor learns, or in the exercise of reasonable care should have learned, of the occurrence and potential effects of any condition which interferes with, or which it is reasonable to believe will or may interfere with, (1) successful implementation of the program or (2) complete and timely performance of Subcontractor's obligations under the Subcontract. The notice shall identify the condition, the impact (anticipated as of the date of the notice) on planned activities and the accomplishment of the Subcontract's purposes and results, and the steps the Subcontractor intends to take to try to correct or mitigate the condition.

13) General Indemnity. Each Party shall hold harmless, defend and indemnify the other and their respective directors, officers, agents and employees from and against all causes of action, losses, claims, liabilities, or damages (including but not limited to costs, reasonable attorneys' fees, and amounts paid in reasonable settlement thereof) which arise or are alleged to arise as a result of the negligent acts, errors or omissions or willful misconduct of the indemnifying Party, its directors, officers, agents or employees. Each Party's obligation to indemnify the other party as set forth above is conditioned on the indemnified party giving the indemnifying party prompt written notice of all claims, providing reasonable cooperation in their investigation and defense, and permitting the indemnifying party to defend said claims at the indemnifying expense with legal counsel of the indemnifying party's choice.

14) Confidentiality. Each Party acknowledges that any information obtained in performing this Subcontract regarding the operation of the other Party or its products, services, policies, systems, programs, personnel, finances, plans, procedures, donor relations or any other aspect of its business, is confidential and proprietary. Each Party will hold such information confidential and will not [i] use such information for any purpose other than performance of this Subcontract or [ii] disclose such information, directly or indirectly, to any other person, without in each instance the prior written consent of the other Party. However, neither Party shall be liable for disclosure or use of the other Party's confidential and proprietary information which:

- i) was at the time of receipt otherwise known to the receiving Party;
- ii) has been published or is otherwise within the public domain or is otherwise generally known to the public at the time of the disclosure to the receiving Party or becomes part of the public domain or otherwise generally known to the public through no breach of this Subcontract;
- iii) is independently developed by the receiving Party; or
- iv) is required to be released by law or court order. When disclosure is required by law, such disclosure shall be made only after the receiving Party has notified the disclosing Party in writing and the disclosing Party has been provided an opportunity to take appropriate action to protect its legal interest in the confidential and proprietary information.

15) Ethics and Integrity. The Subcontractor agrees, in executing this Subcontract and in performing its obligations in connection therewith, to ensure that it, its officers, directors, employees, agents, lower-tier subcontractors and suppliers:



- i) scrupulously avoid any actions in violation of (or that might reasonably be considered by any person as possibly being or appearing to be in violation of) any laws, regulations, rules or Funder policies relating to ethics and integrity; and
- ii) have not engaged, and will not engage, in any corrupt practice (including, without limitation, the offering, giving, receiving or soliciting of anything of value to influence the action of any public official or any officer or employee of IM) or fraudulent practice (including, without limitation, misrepresentation of facts in order to influence a procurement practice or the execution or administration of the Subcontract or the Prime Award, to the actual or potential detriment of InterMedia or the Funder).

16) Suspension.

A) InterMedia may suspend this Subcontract in whole or in part, at any time or from time to time, for any of the following reasons:

- i) material Subcontractor noncompliance; or
- ii) Subcontractor's financial insolvency, bankruptcy, assignment in favor of creditors, or similar or comparable status; or
- iii) Funder suspension, termination or non-funding of all or part of the Prime Award.

In each case, written notice will be issued stating the effective date of the action and what funds, if any, will be available to support expenditures after such date.

- B) The cure period shall be effected by written notice to the Subcontractor, which notice shall identify the basis for suspension and/or possible termination, the reason(s), therefore, the effective date of the action, a statement identifying which part (or all) of the remainder of the Subcontract Term or the program activities are subject to suspension and/or possible termination, and procedures and standards, as appropriate, for phasedown costs and submission of final invoices. The notice shall be effective on the date stated in the notice, or the date the notice is delivered to the Subcontractor, whichever is later.
- C) The Subcontractor shall have thirty (30) days to cure all issues as identified in the notice, failing such deadline InterMedia may terminate the Subcontract in whole or part effective on such date.

17) Termination.

A) InterMedia may unilaterally terminate this Subcontract at any time, in whole or in part, for any of the following reasons:

- i) Material Subcontractor noncompliance; or
- ii) Subcontractor's financial insolvency, bankruptcy, assignment in favor of creditors, or similar or comparable status; or
- iii) Funder termination or non-funding of all or part of the Prime Award.

B) Termination shall be effected by written notice to Subcontractor, which notice shall identify the basis for termination, the reason(s) therefore, the effective date of the action, a statement identifying which part (or all) of the remainder of the Subcontract Term or the Subprogram activities is terminated, and procedures and standards, as appropriate, for phase-down costs and submission of final invoices.

C) The termination shall be effective on the date stated in the notice.

D) Unless otherwise stated in the termination notice, or as otherwise approved on a case by case basis, InterMedia shall not be obligated to reimburse the Subcontractor for any expenses incurred after



the termination effective date. The Subcontractor shall, with due regard to economy, effect an expeditious but orderly phase-down of Subprogram activities and implementation efforts (including, without limitation, subcontracts and lower-tier subawards).

18) Compliance with Law.

- A) In performing its obligations and exercising its rights under the Subcontract, the Subcontractor shall fully comply with all applicable laws (including without limitation all statutes, decrees, ordinances, administrative orders, rules, regulations, and other mandatory directives, policies, and instructions with binding legal effect), whether in the United States, or elsewhere.
- B) The Subcontractor shall be solely liable to pay all costs of such compliance. In addition, the Subcontractor shall be solely responsible to obtain in a timely and effective manner all licenses, permits, and other approvals (including, without limitation, approvals pursuant to the export control, foreign assets control, sanctions, anti-terrorism, and other similar or related rules in the United States), if any, necessary for Subcontractor's successful implementation of its Program.
- C) The Subcontractor is solely responsible, without reimbursement under the Subcontract, for all costs, risks, damages, and other liability incurred by it as a result of its failure to comply with the applicable law.
- D) The Subcontractor shall indemnify and hold harmless InterMedia for and from all costs, risks, delays, losses, damages and other liability incurred by InterMedia due to Subcontractor's noncompliance with such laws or failure to secure such licenses, permits, and other approvals.

19) Governing Language and Law.

- A) The governing (applicable) language of this Subcontract shall be English, and all notices and other communications relating or pursuant to the provisions of the Subcontract (including, without limitation, those in connection with issues and Disputes) shall be in such language.
- B) This Subcontract, its formation and the facts and circumstances surrounding its making and performance, shall be interpreted in accordance with the following, listed in order of precedence: (1) the express terms and conditions of the Subcontract; (2) the laws in effect in Washington, D.C., USA.

20) Disputes. The Parties shall attempt to resolve all issues arising under or relating to the Subcontract amicably, failing which the Subcontractor may request InterMedia to issue, or InterMedia unilaterally may issue (after giving the Subcontractor an opportunity to provide its views), a written decision with reasons. InterMedia's decision shall be final and conclusive on the matter. The Subcontractor shall, notwithstanding any dispute, continue to perform its obligations under the Subcontract.

21) Force Majeure. Any delay or failure of the Subcontractor of required obligations shall be excused if and to the extent caused by acts of God, fire, storm, lockout, strike, terrorist act, flood, sabotage, embargo, war (whether declared or not), riot, or other causes beyond the reasonable control of the Subcontractor.

If the Subcontractor asserts Force Majeure as a reason for failure to perform its obligations, then the Subcontractor must:

- a. notify InterMedia of the likelihood or actual occurrence of an event described in this clause;
- b. prove that reasonable steps were undertaken to minimize delay or damages caused by foreseeable events; and
- c. fulfill all non-excused obligations.



Upon review of the Subcontractor's notice, InterMedia shall determine whether the term of the Subcontract shall be extended for a reasonable period of time necessary to overcome the effect of such delays.

- 22) Assignment.** The Subcontractor shall not assign, transfer, subcontract, or attempt to do any of the foregoing, except for the following types of general support services: communication, translation, photocopying of documents or similar services, without the prior written consent of InterMedia (absent which such action or attempted action shall have no effect as against InterMedia).
- 23) Severability.** If any provision of this Subcontract is deemed by any court of competent jurisdiction to be void, voidable, invalid or unenforceable for any reason, the remainder of the provisions shall not be affected and shall remain valid and enforceable.
- 24) Non-Waiver.** Failure by either Party to insist upon strict compliance with any provision of this Subcontract shall not be deemed to be a waiver or relinquishment of, or otherwise to affect or modify, any of InterMedia's rights or the Subcontractor's duties hereunder, nor shall any waiver or relinquishment of any such right or duty in one case be construed as a waiver or relinquishment in another case.



SECTION F: FUNDER TERMS AND CONDITIONS

(International Bank for Reconstruction and Development)

1. Conflict of Interest

1.1 Subcontractors Not to Benefit from Commissions, Discounts, etc.

The remuneration of the Subcontractor described in the Subcontract as the Total Ceiling Price shall constitute the Subcontractor's sole remuneration in connection with this Subcontract or the Services, and the Subcontractor shall not accept for its own benefit any trade commission, discount, or similar payment in connection with activities pursuant to this Subcontract or to the Services, or in the discharge of its obligations under the Subcontract, and the Subcontractor shall use its best efforts to ensure that the personnel and agents of the Subcontractor similarly shall not receive any such additional remuneration. This clause shall apply with full force and effect to any sub-subcontractors engaged by the Subcontractors in accordance with the Subcontract.

1.2 Subcontractors Not to Engage in Certain Activities

The Subcontractor agrees that the Subcontractor and any entity affiliated with the Subcontractor, as well as any sub-subcontractor and any entity affiliated with such sub-subcontractor,

- (a) shall be disqualified from subsequently providing goods, works or services (other than consulting services) related to the Services;
- (b) for the duration of this Subcontract and for a period of three (3) years after its termination, shall not provide any consulting services related to the Services unless the Subcontractor obtains the prior consent of the Funder (through IM), which consent shall not be unduly withheld unless, in the opinion of the Funder there is a conflict of interest.

1.3 Former World Bank Group Staff and Relatives of Current World Bank Group Staff as Personnel; Dealings with Outside Parties.

- (a) The Subcontractor shall immediately notify the Funder (through IM) of any Personnel (including sub-subcontractor's personnel) intended to be assigned to provide the Services under this Subcontract who is a former World Bank Group staff member and shall warrant that said former World Bank Group staff member is not subject to any work restrictions by virtue of such former employment with the World Bank Group. For purposes of this clause, World Bank Group staff members are defined as current and retired World Bank Group employees, and individuals that have worked for the World Bank Group with at least one of the following types of appointments: Short Term Consultant (STC), Short Term Temporary (STT), Extended Term Consultant (ETC), Extended Term Temporary (ETT) or Junior Professional Associate (JPA).
- (b) The Subcontractor shall use its best efforts not to assign any Personnel (including sub-subcontractor's personnel) who are relatives of current World Bank Group staff. For purposes of this clause, relative is defined as (including those related by adoption and/or step or half relationships): Mother, Father, Sister, Brother, Son, Daughter, Aunt, Uncle, Niece and Nephew. In the event that IM or the Funder or the Subcontractor discovers that any Personnel is a close relative of a current World Bank Group staff member, Subcontractor shall promptly replace said Personnel at no additional cost to IM, with an individual having equivalent skills. Subcontractor shall also reimburse IM for any actual direct costs incurred by IM resulting from the violation of this Article.

(c) With respect to an “outside party”, defined to mean an individual or firm (i) with which the World Bank Group is engaged in a formal dispute (i.e., the outside Party is suing or has been sued by the World Bank Group), (ii) who is being investigated by the World Bank Group for fraud or corruption, or is ineligible to be awarded a World Bank Group-financed contract because of fraud or corruption, or (iii) whose complaint against a procurement decision is under review by the World Bank Group, the Subcontractor:

- (A) hereby confirms that, at the time of signing this Subcontract, it is not knowingly advising an outside party;
- (B) shall not knowingly, for the duration of this Subcontract and for a period of three (3) years after its termination, advise an outside party without the Funder’s prior consent (obtained through IM); and
- (C) shall immediately notify the Funder (through IM) if a client of the Subcontractor becomes an outside party before this Subcontract has been terminated, and shall then, if the Funder so requests, either terminate the contract with the outside party or, at the option of the Subcontractor, terminate this Subcontract with IM.

2. Insurance to Be Taken Out by the Subcontractor

The Subcontractor shall take out and, during the period of effectiveness of this Subcontract, maintain, at its own cost, appropriate insurance coverage, which coverage shall include such insurance as may be required by the law of the country of incorporation of the Subcontractor or sub-subcontractors, and, in addition, the following minimum coverages (or such coverage as indicated in the Special Conditions of the Schedule):

(a) Subcontractors and Sub-subcontractors providing Services in the United States and all Subcontractors and Sub-subcontractors incorporated in the United States

- (i) Worker’s Compensation as required by law;
- (ii) Employer’s liability insurance in the amount of \$500,000 per occurrence;
- (iii) Commercial General Liability insurance in the amount of \$5,000,000 per occurrence;
- (iv) Professional Liability insurance in the amount of \$1,000,000; and
- (v) with respect to automobiles operated in the performance of the Services, \$1,000,000 combined single limit per occurrence.

(b) All other Subcontractors and Sub-subcontractors

Subcontractors incorporated outside of the United States and providing Services outside of the United States are required to have insurance coverage reflective of local market conditions for their country of incorporation and not less than the minimum insurances listed in the World Bank Group’s Individual Country Requirements – Vendor Insurance as published on the World Bank Group website at www.worldbank.org/corporateprocurement.

Subcontractor shall provide IM with certificates of insurance for coverages referencing the Subcontract by number, and shall provide for a thirty (30) day cancellation notice from the insurer(s) on all coverages with a copy of such cancellation notice to be sent directly to IM by the insurer(s). The Subcontractor shall promptly provide IM with new certificates of insurance in the event of renewal of or material changes in each insurance policy. The Funder shall be named as an additional insured under the Commercial General and Automobile Liability policies.



3. Accounting, Inspection and Auditing

The Subcontractor shall, until five (5) years from the expiration or termination of this Subcontract: (i) keep and maintain accurate and systematic accounts and records in respect of the Services hereunder, in accordance with internationally accepted accounting principles and in such form and detail as will clearly identify all relevant charges and costs, and the bases thereof; and (ii) permit IM or the Funder or their designated representatives periodically to inspect the same and make copies as well as to have them audited by auditors appointed by IM or the Funder.

4. Taxes

Subcontractor and all Personnel shall pay all taxes, duties, fees and other impositions that may be levied in conjunction with the performance of the Services, the amount of which is deemed to have been included in the Total Ceiling Amount.

5. Removal and/or Replacement of Personnel

(a) Except as IM may otherwise agree, no changes shall be made in the Key Personnel. If, for any reason beyond the reasonable control of the Subcontractor, it becomes necessary to replace any of the Key Personnel, the Subcontractor shall provide as a replacement a person of equivalent or better qualifications.

(b) If IM (i) finds that any of the Personnel have committed serious misconduct or have been charged with having committed a criminal action, or (ii) has reasonable cause to be dissatisfied with the performance of any of the Personnel, then the Subcontractor shall, at IM's written request specifying the grounds therefore, provide as a replacement a person with qualifications and experience acceptable to IM.

(c) The Subcontractor shall have no claim for additional costs arising out of or incidental to any removal and/or replacement of Personnel.

Addendums

Technical Proposal:

Addendum A: Cover Letter

Addendum B: Past Performance Citation Template

Cost Proposal:

Addendum D: Priced Deliverables and Payment Schedule

Addendum D: Financial Capability Questionnaire

ADDENDUM A – COVER LETTER (Technical Proposal)

<Date>

TO: InterMedia

To Whom It May Concern:

We, the undersigned, offer to provide the CGAP Myanmar Financial Inclusion Study in accordance with your Request for Proposals issued May 25, 2017. Our attached Proposal is for the sum of <Sum in Words (\$0.00 Sum in Figures) >.

Our proposal shall be binding upon us subject to the modifications resulting from contract negotiations, up to expiration of the validity period of the proposal, (i.e., <Expiration date or Validity of Bid >).

We understand you are not bound to accept any Proposal you receive.

Sincerely,

Authorized Signature:

Name and Title of Signatory:

Name of Firm:

Address:

ADDENDUM C – PRICED DELIVERABLES AND PAYMENT SCHEDULE (Cost Proposal)

Offerors shall enter proposed prices in the Bid Amount Column. Deliverables are described on page 10 of the RFP in the SOW. Note that in addition to providing proposed prices for deliverables below, the Offeror should provide a detailed breakdown of costs in an Excel file as part of the Cost Proposal.

The pricing schedule as outlined below is non-negotiable as it is tied to the Master Services Agreement InterMedia has with the client. **Offerors must provide a statement that they accept and agree to the following pricing schedule:**

- i. 20% on contract award
- ii. 40% pre-training/implementation – this payment will be made once the training dates and plan are confirmed with the InterMedia Research Manager. This includes any authorization documentation required to conduct fieldwork in country (e.g. local government/ministry approvals, etc.)
- iii. 25% on submission of data (cleans and QC approved by InterMedia’s QC Supervisor)
- iv. 15% final payment on receipt of approved Technical report and all technical information.

No.	Deliverable	Bid Amount in US\$	Percentage of Total
1	Questionnaire customization		
2	Translated questionnaires		
3	Pretest report		
4	Pilot test report		
5	Fieldwork plan		
6	Weekly status reports		
7	Final clean SPSS data set		
8	Final technical report		
Total			100%

ADDENDUM D – FINANCIAL CAPABILITY QUESTIONNAIRE (Cost Proposal)

The main purpose of this questionnaire is to understand the systems adopted by your institution for financial oversight and accounting of funds.

The questionnaire should be completed by the financial officer of your institution.

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?

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

Yes:

No: (if no, explain)

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

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

Yes:

No:

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

Yes:

No:

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

Yes:

No:

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

Yes:

No:

If yes, how long are such records kept? _____

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

Yes:

No:

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

Yes:

No:

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 InterMedia 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 subcontracts 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.

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

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

Yes:

No:

6. Are your financial reports prepared on a:

Cash basis: Accrual basis:

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

Yes:

No:

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

Yes:

No:

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

Yes:

No: