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# REQUEST FOR APPLICATIONS

**RFA SOLICITATION NUMBER: RFA-AT-2020-001**

Technical Assistance to Establish  
the International Society of Wheelchair Professionals (ISWP)  
as an Independent Organization

**DATE OF ISSUE: MARCH 20, 2020**

CLOSING DATE AND TIME FOR APPLICATIONS:

**Monday, April 13, 2020**

**12:00 PM (EDT)**

Applications must be emailed to: [heard@urc-chs.com](mailto:heard@urc-chs.com)

Deadline for Questions: **March 27, 2020, 5:00 PM EDT**

Questions by email ONLY to: [heard@urc-chs.com](mailto:heard@urc-chs.com)

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Health Evaluation and Applied Research Development (HEARD) is funded by the United States Agency for International Development (USAID) under cooperative agreement number AID-OAA-A-17-00002. The project team includes prime recipient, University Research Co., LLC (URC) and sub-recipient organizations.

Issuance of this RFA does not constitute an award commitment, nor does it commit the University Research Co., USAID, or any other entity to pay for costs incurred in the preparation and submission of an application. Any submission that does not fully comply with requirements of the RFA may be rejected. Furthermore, funding of a selected proposal will be contingent on both the availability of funds and execution of a contractual agreement.

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## 1. ACRONYMS

CPA	Certified Public Accountant
CV	Curriculum Vitae
DUNS	Dun and Bradstreet Universal Numbering System
GAAS	Generally Accepted Auditing Standards
HEARD	Health Evaluation and Applied Research Development Project
ISWP	International Society of Wheelchair Professionals
NGO	Non-governmental Organization
NICRA	Negotiated Indirect Cost Rate Agreement
RFA	Request for Application
URC	University Research Co.
USAID	U.S. Agency for International Development

## 2. PURPOSE OF THE RFA

The United States Agency for International Development (USAID)'s Health Evaluation and Applied Research Development (HEARD) Project and the University of Pittsburgh (Pitt) are seeking a partner institution to work with the International Society of Wheelchair Professionals (ISWP) Forming Committee, a committee of sector leaders, to set the direction for establishing the new organization.

The purpose of the RFA is to solicit applications from interested organizations to facilitate the process of establishing the ISWP as an independent organization with an appropriate governance and funding model for long-term sustainability, by working with ISWP staff, an ad-hoc forming committee, and additional stakeholders.

## 3. SUCCESSFUL APPLICANTS

Successful applicants will have a highly sophisticated and specific skill set and organizational capacity expected to include:

- Experience (at least five years) and current expertise on matters of organizational governance, financial sustainability, and/or professional accreditation programs, particularly within the international development sector;
- Experience and current expertise with governance structures and financial sustainability models for society/membership organizations in the health sector;
- Experience developing financial projection models for sustainability;

- Proven track record of collaborating and engaging successfully a wide variety of stakeholders with varied interests and needs;
- Experience in launching, leading, managing, and/or governing a sectoral society or membership organization;
- Ability to obtain, analyze, and evaluate a variety of information; to organize, interpret, and present it in verbal or written form for varied audiences; and to provide solid analysis leading to sound decision-making.
- International experience is required.
- Demonstrated managerial, technical, and institutional capacities to achieve the results outlined in this RFA.
- Strong institutional financial and management capacities.

#### **4. BACKGROUND**

The USAID’s HEARD Project is implemented by University Research Co. LLC (URC). The purpose of the HEARD Project is to undertake research efforts to accelerate progress towards achieving USAID’s global health and development goals, including “Ending Preventable Child and Maternal Death”; “Achieving an AIDS Free Generation”; and “Protecting Communities from Infectious Diseases Initiatives” including the “Global Health Security Agenda.” The HEARD Project focuses on evaluative and targeted research that accelerates research-to-use processes.

Hosted at the University of Pittsburgh (Pitt), ISWP was launched in February 2015. ISWP has a mission to serve as a global resource for wheelchair service standards and provision through advocacy, education, standards, evidence-based practice, innovation, and a platform for information exchange. ISWP’s vision is that all people who need wheelchairs receive appropriate products and services with dignity, enabling them to access education, employment, and health care, and to participate in their communities.

In 2018, ISWP received a subaward through the HEARD project to support the organization’s activities in four areas:

- Promote collaboration within the wheelchair sector.
- Develop wheelchair product standards for adverse conditions.
- Establish wheelchair service standards encompassing potential accreditation or credentialing.
- Establish ISWP as a separate entity.

The organization is led by the director, a 22-person Advisory Board, 4 active Working Groups and Subcommittees, and a group of Pitt faculty, staff, and students who support ISWP’s initiatives. The Advisory Board consists of an experienced cross-section of wheelchair clinicians, research scientists, humanitarian organizations, and manufacturers that provides direction and counsel for ISWP’s programs. ISWP’s Working Groups and Subcommittees are comprised of representatives from the international wheelchair community who meet regularly to develop and implement action plans related to the organization’s objectives.

In 2017, ISWP’s Advisory Board approved a five-year strategic plan. One of the strategic plan goals is for ISWP to become an independent organization.

## 5. OVERALL OBJECTIVES

HEARD and the University of Pittsburgh aim to establish and launch an independent, stakeholder-led resource center. The resource center will serve as a consultative and coordinating body to support the development and promotion of evidence-based products and services standards for the global wheelchair sector and to maintain coordination among the wheelchair sector.

The focus of the work under this RFA will be to facilitate the process of accomplishing this goal by working with ISWP staff, an ad-hoc Forming Committee, and additional stakeholders to establish ISWP as an independent entity with an appropriate governance structure and funding model for long-term sustainability.

## 6. TIME FRAME

Activities to start in April 2020 and are projected to continue for roughly 6 (six) months.

## 7. TOTAL ESTIMATED AMOUNT

Total funding for this award is estimated to be up to \$40,000 USD over the six-month implementation period.

## 8. EXPECTED ACTIVITIES

The successful organization will be working closely with the University of Pittsburgh and be responsible for meeting timelines and providing deliverables outlined below. The organization will work closely and report to the ten-member Forming Committee.

*Table 1* outlines activities to be completed and deliverables. Please provide a detailed proposal with estimated number of workdays per activity, as well as all associated costs. You should propose and describe any activities not indicated here that you believe should be included.

*Table 1: Activities and Deliverables*

<b>Activity</b>	<b>Deliverable</b>
Hold kick-off meeting with URC and ISWP; finalize activities to be completed and timeframe.	#1: Meeting recap
Review ISWP documents – background documents, draft Forming Committee Terms of Reference, and “zero draft” plan which ISWP prepares as foundation for project.	#2: Briefing or questions/comments from consultant based on review
Hold kickoff call with Forming Committee to review scope of project and reach agreement on Forming Committee terms of reference.	#3: Final Forming Committee Terms of Reference

Lead Forming Committee calls to reach consensus on organizational structure (e.g., where organization will be incorporated,) governance (including Board and Standing Committees), and key activities.	#4: Organizational overview
Based on agreed-upon organizational overview, lead Forming Committee calls to develop detailed organizational plan including bylaw parameters, Board and standing committees' structures, conflict of interest policies, and other organizational requirements.	#5: Detailed organizational plan
Lead Forming Committee calls to develop funding model to support organizational plan to include membership categories, dues, and value propositions.	#6: Funding model #7: Membership categories, dues, and value propositions
Lead Forming Committee calls to develop funding strategy based on funding model and operational plan.	#8: Funding strategy
Lead Forming Committee calls to develop implementation plan for new organization, including activities, timelines, and responsibilities.	#9: Implementation plan
Present organizational overview and plan, funding model, and strategy and implementation plan to ISWP Advisory Board.	#10: Advisory Board presentation
Incorporate Advisory Board feedback into final report with Forming Committee agreement.	#11: Final report and plan
Implement plan to transition ISWP to separate entity outside of University of Pittsburgh.	#12: Implementation completion, with regular progress reports to university/ ISWP and Forming Committee

## 9. INSTRUCTIONS FOR THE APPLICATIONS

### 9.1. ELIGIBILITY

To be eligible for the award under this RFA, applicants must meet the requirements stated below.

- 1) Be a U.S. or non-U.S. based NGO; or
- 2) Be a U.S. or non-U.S. based for-profit, not-for-profit, international organization, or private voluntary organization, inclusive of universities. In the case of for-profit organizations, no fee or profit will be allowed.
- 3) The Recipient must be a responsible entity and have the necessary organizational, experience, accounting, and operational controls and technical skills in order to achieve the objectives of this activity and comply with the terms and conditions of the award.
- 4) Foreign governments and foreign government-owned parastatal organizations are not eligible to apply for funding under this program.

Responses from organizations that do not meet the eligibility criteria listed above will not be reviewed and evaluated.

## 9.2. GENERAL INSTRUCTIONS

### Key Information

- Due date for questions about RFA: **March 27, 2020, 5:00 p.m. EDT.**
- Due date for applications: **April 13, 2020, 12:00 p.m. EDT**
- Number of award(s) expected: One
- Maximum page length of technical application: 12 pages maximum (not including Cover Page, Table of Contents, Acronyms, Annexes)
- Language for technical and cost applications: English only
- Submitted via Microsoft Word (preferably) or PDF formats, except budget files which must be submitted in Microsoft Excel.
- The technical application must be in searchable and editable Word or PDF format as appropriate.
- The Cost Application must include an Excel spreadsheet with all cells unlocked and no hidden formulas or sheets. A PDF version of the Excel spreadsheet may be submitted in addition to the Excel version at the applicant's discretion; however, the official cost application submission is the unlocked Excel version
- Applications must be submitted by email to [diunusalieva@urc-chs.com](mailto:diunusalieva@urc-chs.com). Email submissions must include the RFA number and applicant's name in the subject line heading. In addition, for an application sent by multiple emails, the subject line must also indicate whether the email relates to the technical or cost application.

Both the Technical and Cost Applications must include a **cover page** containing the following information:

- Date of submission
- Name of the organization(s) submitting the application
- Identification and signature of the primary contact person (by name, title, organization, mailing address, telephone number and email address) and the identification of the alternate contact person (by name, title, organization, mailing address, telephone number and email address)
- Program name
- Request for Application (RFA) number

All applications received by the deadline will be reviewed for responsiveness to the specifications and may be determined to be nonresponsive if they do not follow the instructions in the RFA. Section 10 addresses the technical evaluation procedures and criteria for the applications. Applicants are advised to read the instructions carefully.

## 9.3. INSTRUCTIONS FOR THE TECHNICAL APPLICATION

The technical application must be specific, complete, and presented concisely, demonstrating the applicant's organizational capabilities and technical expertise with respect to achieving the activities

described in the RFI. The application should take into account the activity description and review criteria found in this RFA.

The Technical Application must be:

- Written in English
- Typed in a Microsoft Word compatible program, single-spaced with a 12-point font and one-inch margins
- Saved and submitted as one document in PDF or Word format, with all sections and appendices put together
- Labeled with page numbers, the RFA number and the name of the applicant organization on every page
- Technical Application must not exceed 12 pages, not including cover page, acronyms list, table of contents and annexes.

The Technical application must include the following sections:

**(a) Cover Page** (See Section 9.2 above for requirements - not included in the page limit)

**(b) Acronyms List** (not included in the page limit). The Acronyms page must include a list of acronyms from the technical application.

**(c) Table of Contents** (Not included in the page limit).

**(d) Executive Summary (limit 1 page)**. The Executive Summary must provide a high-level overview of key elements of the Technical Application. This section should contain the information that the applicant believes best represents its proposed implementation approach/plan, anticipated results, and how the overall activity will be managed.

**(e) Organizational capacity and technical expertise (up to 7 pages)**

Section 1: Experience and current expertise related to organizational governance structures, financial sustainability models for society/membership organizations and/or professional accreditation programs in the health sector, particularly within the international development context **(limit 2 pages)**;

Section 2: Experience and current expertise related to collaborating and engaging a wide variety of stakeholders with varied interests and needs successfully **(limit 2 pages)**;

Section 3: Experience and current expertise establishing, developing, and managing and/or governing a sectoral society or membership organization **(limit 1 page)**;

Section 4: Experience related to obtaining, analyzing and evaluating a variety of information; organizing, interpreting and presenting it in verbal or written form for varied audiences, as well as providing solid analysis leading to sound decision-making **(limit 1 page)**;

Section 5: Geographic experience and institutional capacity to coordinate and implement the above-mentioned activities; including technical, financial, and administrative management capacity **(limit 1 page)**.



**(f) Key Personnel and Staffing Plan (limit 1 page):** Applicant must describe Proposed Key Personnel summarizing his/her specific training, role, and experience with leading activities described under this RFA. CV(s) must be included in Annex.

**(g) Implementation Plan (up to 3 pages):** The Applicant must provide an implementation plan describing proposed timeline, activities, benchmarks and anticipated deliverables. The Applicant is expected to provide a Gantt chart, showing the main categories of activities and the activities in each category with implementation timeline. The Gantt chart can be placed in Annex.

**(h) Annexes:** CV(s), Gantt Chart.

## 9.4. INSTRUCTIONS FOR THE COST APPLICATIONS

The Cost Application must be submitted by email at the same time the technical application is submitted. The applicant should propose a line item budget for the period of the assessment. There will be no profit/fee allowed for this award.

The Cost Application must contain the following sections:

**(a) Cover Page:** The Cost Application cover page must contain the same information as the Technical Application cover page).

**(b) Budget:** The budget must be submitted as one unprotected Excel file with visible formulas and references and must be broken out by project year, including itemization of the federal and non-federal (cost share) amount. Budget items with the total zero value should not be included in the budget. Files must not contain any hidden or otherwise inaccessible cells. Budgets with hidden cells lengthen the cost analysis time required to make award and will result in a rejection of the cost application. The budget must include the following worksheets or tabs at a minimum:

- **Summary budget,** must be inclusive of all project costs (USAID-funded and cost share), broken out by major budget category for activities implemented by the applicant for the entire period of the assessment.
- **Detailed budget,** which is a detailed version of the Summary Budget. The detailed budget must reflect each estimated cost item, broken out. Detailed budget must include a breakdown budget category and budget line items for all federal funding for the entire implementation period of the project. Each cost must be specified. Unallowable costs and costs without a clear definition (such as "Miscellaneous" and "Other") will not be accepted.

**(c) Budget Narrative:** The cost elements provided in the Detailed Budget must also be provided in the Budget narrative, but with text that explains the rationale for the costs and any budget assumptions. The Budget Narrative must contain sufficient detail so that reviewers can read the document while reviewing the Detailed Budget and understand the proposed costs. Explain all assumptions in the budget narrative.

**(d) NICRA or audited financial statements to support indirect rates:** Indirect Costs must be supported with information to substantiate the calculation of the indirect cost. If the applicant (and each sub-applicant, if applicable) has received one of the following, it must provide the document in the cost

application to substantiate the indirect cost: 1) a letter from a cognizant U.S. Federal audit agency or a Negotiated Indirect Cost Agreement (NICRA); or 2) a narrative that supports how the indirect rates were calculated. If the Applicant does not have a NICRA, the applicant must submit the following:

Reviewed Financial Statements Report: a report issued by a Certified Public Accountant (CPA) documenting the review of the financial statements was performed in accordance with Statements on Standards for Accounting and Review Services; and that management is responsible for the preparation and fair presentation of the financial statements in accordance with the applicable financial reporting framework and for designing, implementing and maintaining internal control relevant to the preparation. The accountant must also state that he or she is not aware of any material modifications that should be made to the financial statements; or

Audited Financial Statements Report: An auditor-issued report documenting the audit was conducted in accordance with Generally Accepted Auditing Standards (GAAS), and the financial statements are the responsibility of management. It also provides an opinion that the financial statements present fairly in all material respects, and the financial position of the company and the results of operations are in conformity with the applicable financial reporting framework (or issues a qualified opinion if the financial statements are not in conformity with the applicable financial reporting framework.).

**(e) Required Certifications, Assurances, and Solicitation Provisions:** Applicants must complete the Certifications, Assurances, and Representations documentation found at the following link, and include a PDF with the full application submission:

<http://www.usaid.gov/sites/default/files/documents/1868/303mav.pdf>

**(f)** Applicant must provide a valid **DUNS** (Dun and Bradstreet Universal Numbering System) number in its application.

## 10. REVIEW AND SELECTION PROCESS

### 10.1. TECHNICAL REVIEW

A Technical Review Committee will evaluate the applicants' Organizational Capacity and Technical Expertise Statement taking into account the eligibility criteria (Section 9.1) and the technical review criteria (Section 10.2) found in this RFA.

### 10.2. EVALUATION CRITERIA FOR TECHNICAL APPLICATIONS

**Technical applications** will be reviewed and evaluated against the following criteria:

1. Demonstrated experience and expertise related to organizational governance structures, financial sustainability models for society/membership organizations and/or professional accreditation programs in the health sector, particularly within the international development context;

2. Demonstrated experience and expertise related collaborating and engaging a wide variety of stakeholders with varied interests and needs successfully;
3. Demonstrated experience and expertise establishing, developing, and managing and/or governing a sectoral society or membership organization;
4. Demonstrated experience related to obtaining, analyzing, and evaluating a variety of information; organizing, interpreting, and presenting it in verbal or written form for varied audiences, as well as providing solid analysis leading to sound decision-making;
5. Demonstrated institutional capacity, including financial and administrative management capacity required to manage U.S. Government funds;
6. Proposed key personnel possesses demonstrated leadership, specific training, expertise, and experience relevant to the activities described under this RFA.

Once the technical review of the applications is completed, HEARD Project will evaluate **Cost Application** of the apparently successful applicant for cost reasonableness, allocability, allowability, cost effectiveness and realism, adequacy of budget detail, financial feasibility, and consistency with elements of the Technical Application. There will be no points given for the Cost Application. However, final selection of award will take into consideration cost realism and best value for the HEARD Project and the U.S. Government.

### **10.3. NOTIFICATION PROCESS**

HEARD project will review and select responses submitted in accordance with the guidelines and criteria set forth in this RFA. Short-listed applicants will be contacted to answer further questions.

HEARD project reserves the right to disregard any applications that do not meet the requirements. The HEARD project is not obligated to issue a financial instrument or award as a result of this RFA.