Business Development:
Pre-RFA to Post-Submission Best Practices

USAID/Accelerating Support to Advanced Local Partners II (ASAP II)
WEBINAR SERIES
January 26, 2023
A FEW QUICK NOTES

1. Welcome Local Partners – tell us where you’re from in the chat.

2. Please use the Q&A box to ask any questions and the chat box for answering questions asked by the presenters.

3. We have three polls during the webinar today.

4. The presentation for today’s webinar will be saved on ASAP’s website at www.intrahealth.org/asap-resources
Rapidly prepare Local Partners to have the capabilities and resources to serve as Prime Partners for USAID/PEPFAR programming, in compliance with USAID and PEPFAR procedures, for PEPFAR program implementation in FY 2022 and 2023.

70% of USAID PEPFAR funding to local prime partners.

**STRATEGIC OBJECTIVES**

1. Strengthen Local Partners as they transition to receive PEPFAR funding as a USAID Prime Partner to comply with regulations.

2. Prepare Local Partners to directly manage, implement, and monitor PEPFAR programs, and maintain consistent PEPFAR program achievement and quality.
# Strategic Objectives

## SO1

1. Organizational Assessments
2. Financial Management
3. Fraud prevention, detection & management
4. Compliance
5. Risk Management
6. Human Resources (HR)
7. Business Development/Sustainability
8. Governance and Leadership for NGOs
9. Government-to-Government (G2G)

## SO2

1. Organizational Assessments
2. NUPAS Plus data entry, analysis, & visualization
3. Program Management & Monitoring Tools
4. AMELPS for NGOs
5. Collaborate, learn, and adapt (CLA)
6. Data quality assessment
7. Online surveys
8. Communications and knowledge management
9. Gender Equity & Social Inclusion
KEY RESULTS from ASAP I & II

ASAP has supported
89 local organizations
in 18 countries

84 local partner organizations

5 local government partners
USAID/ASAP has broadcasted **77 webinars** for **more than 16,000+ attendees**.

- Find past webinars on ASAP’s web page [www.intrahealth.org/asap-resources](http://www.intrahealth.org/asap-resources)
Choose your **language** or topic.

Featuring webinars in **French, English, and Portuguese**.
UPCOMING WEBINARS

**FEBRUARY**
French-language webinars:

*Business Development*
*Highly Effective Boards*

**MARCH**

*Visualizations for Effective Program Performance Tracking:*
How to Choose the Right Visuals to Achieve Targets

*Bringing program data to life:*
Data Processing Overview and a Demonstration in PowerBI

Click for upcoming ASAP Webinars

Today’s webinar and this publication have been made possible by the support of the American people through the United States Agency for International Development (USAID) and the President’s Emergency Plan for AIDS Relief (PEPFAR). The contents are the sole responsibility of IntraHealth International and do not necessarily reflect the views of USAID or the United States Government.
TODAY'S PRESENTER

Rebecca Boler
Business Development Sr. Manager
IntraHealth International
USAID/ASAP II Prime Partner

*Presenter at the 4th Annual
USAID Global Health Local Partner Meeting

Q&A Support

Jennifer Bartlett
Director, Business Development | IntraHealth International
<table>
<thead>
<tr>
<th>Topic</th>
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<td>Identifying Opportunities and Making a Go Decision</td>
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<td>Pre-Planning for the Opportunity Release</td>
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<td>Forming a Winning Consortium</td>
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<td>Live Proposal Development</td>
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<td>Q&amp;A</td>
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<td>Live Proposal Development, cont.</td>
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<td>Budget Development</td>
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<tr>
<td>Proposal Finalization, Submission, and Post-Submission</td>
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<tr>
<td>Q&amp;A</td>
</tr>
</tbody>
</table>
Identifying Opportunities from USAID and other Donors

- Direct outreach from the donor
- Become familiar with USAID’s Country Development Cooperation Strategy (CDCS) for your country
- Word of mouth through your networks (colleagues, donors, stakeholders, etc.)
- USAID Business Forecast
- Grants.gov for grant and cooperative agreement (assistance) opportunities
- Websites for foundations, corporations, INGOs, etc.
### USAID Business Forecast

#### Business Forecast Search Links

Use the "Filter Opportunities" form below to search for current business opportunities.

- To browse all available opportunities, click the Search button without changing any of the search fields.
- To include opportunities that match all options in a particular filter, leave all of the checkboxes in that group unchecked. For example, if no sector checkboxes are checked, then opportunities matching any sector will be included.

#### Filter Opportunities

286 results

<table>
<thead>
<tr>
<th>Operating Unit</th>
<th>AAA Plan Id</th>
<th>Sector</th>
<th>Award Type</th>
<th>Solicitation Date</th>
<th>Start Date</th>
<th>NAICL</th>
<th>FY</th>
</tr>
</thead>
<tbody>
<tr>
<td>Choose options</td>
<td>Choose options</td>
<td>Choose options</td>
<td>Choose options</td>
<td>Solicitation Date: mm/dd/yyyy</td>
<td>Start Date: mm/dd/yyyy</td>
<td>NAICL</td>
<td>FY</td>
</tr>
</tbody>
</table>

[SEARCH] [Reset]
USAID Business Forecast

Example:

Operating Unit: South Africa
Sector: HIV/AIDS (More than 50% funded by PEPFAR)
AFA Special Items: N. Mangalaza
Eligibility Criteria: TBD
Principal Geographic Code: 995 - Worldwide (Including Cooperating Country)

Award Action Type: To Be Determined (TBD)
Category Manager: TBD - Use Vehicle: N/A
Small Business Set Aside: TBD
Co-creation: TBD

Anticipated Solicitation Release Date: 9/30/2023
Anticipated Start Date: 9/30/2024
Total Estimated Cost: $25M - $40.99M

10/12/2022 08:53 AM EST - Added Co-creation TBD Added Principal Geographic Code 995 - Worldwide (Including Cooperating Country)
Making a go decision

Is the opportunity....
- Within your experience/expertise? If there are any gaps in your expertise, geographic presence, etc. are there partners you can work with to fill them?
- Strategic for the growth/expansion of your organization and its mission?
- Being awarded through a mechanism your organization can implement?
- Presenting any risks and if so, can those risks be mitigated?
- Do you have the resources to pull a high-quality proposal together in time?

If the answers are “yes”, then you’ll move to the next phase...
Pre-Planning (Capture)

What is Pre-Planning?

It is an opportunity-specific process following a go decision that continues until the opportunity is released (for competitive opportunities)

It includes:

- A thorough assessment of the opportunity
- An analysis of the competition
- An assessment of your organization’s technical capabilities

To then inform and begin:

- Your strategy to resource the proposal effort and identify your proposal team
- Your partnering strategy and begin to build your consortium
- Your initial technical, management, and budgeting strategies
- Your recruitment of key personnel
Forming a Winning Consortium

Things to consider

- Complementary vs. overlapping skills/expertise
- Good reputation/credibility
- Strategic geographic focus
- History of positive performance
- What type of partners are needed - exclusive, non-exclusive, technical assistance, implementation, or resource partners

How to identify

- Research current implementers with USAID and other donors
- Use your networks (employees, former colleagues)
- Attend industry sponsored events (TWGs, project closeout events)
- WorkwithUSAID.org - A resource hub designed for new, current, and future local and international partners to navigate how to work with USAID.
Forming a Winning Consortium

Tools

• Capability statements give a summary of your organization and its technical/geographic expertise, proof of qualifications
• Scope of Work – agree on the partner’s role/responsibilities for proposal preparation and for the project
• Non-Disclosure Agreements (NDA) - is a binding contract between two or more parties that prevents sensitive information from being shared with others.
• Pre-Teaming and Teaming Agreements (PTA/TA) – establishes a formal relationship between your organizations, sets out the parameters under which you’ll work together, details the sub-partners SOW for the project, etc. (can be exclusive or non-exclusive)
  – PTAs are entered into before an RFA is released and are subject to review/adjustment once the RFA is released – these contain draft SOWs and contain NDA language so that organizations can work together before the final RFA is released. Final TAs are entered into upon
  – Do not share any proprietary or competitive information before a signed teaming agreement is in place.
  – Should be signed as soon as possible so that information sharing is not impeded.
Live Proposal Development

Issue Date: March 8, 2021
Deadline for Questions: March 22, 2021 at 3:00PM Local time
Closing Date: April 29, 2021 at 3:00PM Local time
Subject: Notice of Funding Opportunity (NOFO) Number: 720663355RFA11112
RFA has been released – what now?

- Get organized!
- Streamline coordination and communication
- Keep people informed
- Allocate the proper resources
- Ensure quality and compliance
- Establish knowledge management
Live Proposal Development – what to do first?

1. Read the RFA!
2. Identify/reconfirm your proposal team and make assignments
3. Create/review your calendar
4. Create a compliance matrix to review RFA requirements, evaluation criteria, and compliance
5. Identify/review your partnership configuration
   - Add/drop partners, revise SOWs
   - Keep partners informed and involved in the process
6. Review/reconfirm key personnel/staff candidates and gear up to fill any gaps
7. Read the RFA again!
Proposal Team Functions

Define the roles that are critical for success and how your staff can fill them. Ensure the roles/responsibilities are clear and communicate often!

Functions:
- Organization, communication, and knowledge management
- Technical/M&E
- Budgeting
- HR/Recruitment
- Reviewers (technical, compliance, budget)
# Proposal Calendar

<table>
<thead>
<tr>
<th>Mon</th>
<th>Tue</th>
<th>Wed</th>
<th>Thu</th>
<th>Fri</th>
<th>Sat</th>
<th>Sun</th>
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<tbody>
<tr>
<td><strong>MARCH 8</strong></td>
<td>9</td>
<td>10</td>
<td>11</td>
<td>12</td>
<td>13</td>
<td>14</td>
</tr>
<tr>
<td>RFA Released by USAID</td>
<td>Kick off meeting with proposal team</td>
<td></td>
<td>Partner packets distributed</td>
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<td>15</td>
<td>16</td>
<td>17</td>
<td>18</td>
<td>19</td>
<td>20</td>
<td>21</td>
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<tr>
<td>Technical Strategy Sessions as needed</td>
<td>Key personnel interviews start</td>
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<td>Submit questions to USAID by 5pm</td>
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<td>22</td>
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<td>24</td>
<td>25</td>
<td>26</td>
<td>27</td>
<td>28</td>
</tr>
<tr>
<td>Questions due to USAID by 3pm</td>
<td>First draft proposal due, team reviews for feedback</td>
<td></td>
<td>Technical draft sent to reviewers</td>
<td>Final Key Personnel candidates selected</td>
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<td>29</td>
<td>30</td>
<td>31</td>
<td><strong>APRIL 1</strong></td>
<td>2</td>
<td>3</td>
<td>4</td>
</tr>
<tr>
<td>CVs for Key Personnel formatting and editing</td>
<td>Technical Review 1 - meeting to discuss reviewer feedback</td>
<td>Budget Review 1 - meeting to discuss reviewer feedback</td>
<td></td>
<td>Final CVs for Key Personnel due for review</td>
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<td>5</td>
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<tr>
<td>Final budgets due</td>
<td>Technical Review 2 - meeting to discuss reviewer feedback</td>
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<td>12</td>
<td>13</td>
<td>14</td>
<td><strong>Final Budget Review</strong></td>
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<td>16</td>
<td>17</td>
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<td>Final CVs and Letters of Commitment for Key Personnel due</td>
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<td>21</td>
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<tr>
<td>Final technical, budget, and annexes due</td>
<td>Copy editing and formatting</td>
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<tr>
<td>Final review and sign off</td>
<td>Submit application to USAID by 5pm</td>
<td>Application due to USAID by 5pm</td>
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Compliance Matrix

Integrated HIV Care and Treatment Support Activity
NOFO 720663355RFA11112

Compliance Matrix

Deadlines
- Final – April 29, 2021, at 3:00PM local time – email to proposalcontact@usaid.gov
- Questions – March 22, 2021, at 3:00PM local time - add submission proposalcontact@usaid.gov

Proposal Specifics
- Page limit – 30 pages for Technical Application
- Written in English
- Use standard 8 ½” x 11”, single sided, single-spaced, 12 point Times New Roman font, 1” margins, left justification and headers and/or footers on each page including consecutive page numbers, date of submission, and applicant’s name.
- 10 point font can be used for graphs and charts. Tables, however, must comply with the 12 point Times New Roman requirement.
- Submitted via Microsoft Word or PDF formats, except budget files which must be submitted in Microsoft Excel.
- The estimated start date identified in Section 8 of this NOFO must be used in the cost application.
- The technical application must be a searchable and editable Word or PDF format as appropriate.
- The Cost Schedule 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.
- The Technical Application must be consecutively numbered on each page and must not exceed thirty (30) pages (not including the cover page, table of contents, acronym page, executive summary, and appendices); Pages in excess of this limit will not be considered.

Proposal Evaluation Criteria (PAGE 47):

<table>
<thead>
<tr>
<th>Technical Approach</th>
<th>50 points</th>
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<tbody>
<tr>
<td>The quality of the proposed conceptual approach, methodologies and techniques in achieving the stated results of the activity.</td>
<td></td>
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</table>

<table>
<thead>
<tr>
<th>Management and Staffing</th>
<th>30 points</th>
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<tbody>
<tr>
<td>The quality and appropriateness of the proposed management approach and key personnel and the extent to which the applicant proposed an efficient organization that will effectively implement the activity.</td>
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</table>

<table>
<thead>
<tr>
<th>Organizational Capacity</th>
<th>20 points</th>
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</thead>
<tbody>
<tr>
<td>The extent to which the applicant, and proposed sub-grantees, possess the current organizational knowledge, capability, relevant experience and operational systems necessary to implement the desired interventions.</td>
<td></td>
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</tbody>
</table>
## Compliance Matrix

### Application Outline

<table>
<thead>
<tr>
<th>PAGE #</th>
<th>SECTION</th>
<th># OF PAGES</th>
<th>PERSON RESPONSIBLE</th>
</tr>
</thead>
<tbody>
<tr>
<td>FROM RFA/RFP</td>
<td>TECHNICAL APPLICATION</td>
<td></td>
<td></td>
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<tr>
<td></td>
<td>Cover Page</td>
<td>1 page (not counted against page limit)</td>
<td>Proposal Manager</td>
</tr>
<tr>
<td></td>
<td>Name of the organization(s) submitting the application</td>
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<tr>
<td></td>
<td>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)</td>
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<td>Program name</td>
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<tr>
<td></td>
<td>Notice of Funding Opportunity number</td>
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<td></td>
<td>Name of any proposed sub-recipients or partnerships (identify if any of the organizations are local organizations, per USAID's definition of 'local entity' under ADS 505)</td>
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<tr>
<td></td>
<td>Table of Contents</td>
<td>No limit (not counted against limit)</td>
<td>Proposal Manager</td>
</tr>
<tr>
<td></td>
<td>Include major sections and page numbering to easily cross-reference and identify merit review criteria</td>
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<td></td>
<td>Acronym List – not included in RFA – ask a question?</td>
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<tr>
<td></td>
<td>Executive Summary</td>
<td>1 page (not counted against page limit)</td>
<td>Technical Writer</td>
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<tr>
<td></td>
<td>The Executive Summary must provide a high-level overview of key elements of the Technical Application, management approach, implementation plan, expected results and monitoring and evaluation plan.</td>
<td></td>
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<tr>
<td></td>
<td>Technical Approach</td>
<td>15 pages</td>
<td>Technical Writer</td>
</tr>
<tr>
<td></td>
<td>This section must address the following:</td>
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<td></td>
<td>Conceptual Approach: Provide a concise background on the specific development challenge or opportunity.</td>
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<td></td>
<td>Include a problem statement with a brief analysis of the stakeholders and intended beneficiaries involved.</td>
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<td></td>
<td>Describe the key opportunities as well as the issues and challenges of implementing HIV Care and Treatment interventions in Georgia. Describe how the proposed approach and illustrative activities are relevant and likely to achieve the expected results. Describe the approach for actively engaging a variety of stakeholders, leading to harmonization, integration and coordination/collaboration among parties</td>
<td></td>
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<td></td>
<td>Methodology: Briefly discuss and/or reference the evidence base backing the choice of methodologies and describe how the program will implement these particular approaches. Describe the anticipated link between the proposed activities and their intended impact on the objectives in this program.</td>
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<td></td>
<td>Results: Describe how anticipated results are logically connected to the objectives. The proposed activity must promote and strengthen sustainable practices and changes beyond the life of the award. Discuss how the proposed innovative methodologies can lead to sustained HIV epidemic control in Georgia. Discuss how this program will build sustainability into activities, so they can be continued after USAID assistance ends</td>
<td></td>
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<tr>
<td></td>
<td>Organizational Capacity</td>
<td>5 pages</td>
<td>Proposal Manager</td>
</tr>
<tr>
<td></td>
<td>In this section, describe the Applicant’s organizational and management structure, including how it contributes towards achieving the objectives and results of their proposed technical approach. The applicant should describe the organization’s ability to start implementation immediately after award, including a plan that will result in a flexible, efficient and rapid transition strategy. The plan should also include flexibility in programming to be responsive to the state of the COVID-19 or unanticipated situations that could impact implementation. The Applicant should demonstrate a commitment to capacity building of its partners, including training to improve technical, managerial, and financial capacity, specifically the organizational and financial management procedures, with specific benchmarks and goals needed for operations that meet USG</td>
<td></td>
<td></td>
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</table>
Questions to the Donor

• When asking USAID or another donor a question on the RFA – some things to consider:
  – Frame the question in a way that the donor can easily answer and answer in the way you’d like to see.
  
  – Will your question give away your technical approach or strategy?

  – Could the donor answer it in a way that will not help you clarify?

  – Do you need to ask the question, or is it better to assume and proceed?
Q&A – 10 minutes
Technical Approach

Describes your approach and rationale to addressing the challenge or opportunity outlined in the solicitation.

The technical approach is the largest section of your technical proposal—and the one that carries the most weight when the donor is scoring submissions to select a partner.

Be sure that it:

• Demonstrates your understanding of the programming context and stakeholders;
• Describes how you will achieve objectives;
• Includes a plan for monitoring, evaluating, and learning (MEL);
• Provides specific interventions to achieve the overall Activity goal; and
• Outlines how you will test, document, and share best practices and lessons learned.
Management and Staffing Plan

The management and staffing plan describes how you will:

- Identify and work with partners or subrecipients
- Establish lines of authority, communication, and reporting
- Assign staff to key roles and obtain additional technical expertise as needed
  - Including Key Personnel and non-key staff that are essential to the project
  - CVs for Key Personnel are usually requested in the Annex and must describe and demonstrate their qualifications and meeting the requirements.
• Develop your org chart early and cost it out to ensure the structure is feasible

• Use what assumptions you can to get started

• Staffing needs will vary depending on the type of project – service delivery vs. technical assistance

• Balance the budget to ensure appropriate percentages are going to staff vs. activities
Monitoring, Evaluation, and Learning Plan

1. Identify Program Goals and Objectives

2. Define Indicators (output and outcome) – sometimes provided in the RFA, USAID standard indicators, and custom indicators.

3. Define Data Collection Methods and Timeline.

4. Identify M&E Roles and Responsibilities.

5. Create an Analysis Plan and Reporting Templates.

6. Plan for Dissemination and Donor Reporting.
Organizational Capacity and History of Performance

Organizational Capacity
• Appears as a narrative within the Technical Application.
• Demonstrates that you can perform the SOW of the opportunity by describing past and current work related to the SOW of the opportunity.
• Include experience of the prime and the consortium partners.

History of Performance/Past Performance
• Appears in the Annexes
• Using the template provided by USAID/donor, describes specific projects that you’ve recently implemented related to the SOW of the opportunity.
• USAID will contact staff who are familiar with your work and can speak to your performance.
• For the prime and consortium partners.

<table>
<thead>
<tr>
<th>HISTORY OF PERFORMANCE</th>
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<tbody>
<tr>
<td>1. Award Number:</td>
</tr>
<tr>
<td>2. Agency or Entity Providing the Funding:</td>
</tr>
<tr>
<td>3. Description of the Program Including Complexity/Diversity of Tasks:</td>
</tr>
<tr>
<td>4. Primary Location(s) of Program:</td>
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<td>5. Period of Performance:</td>
</tr>
<tr>
<td>6. Skills/Expertise Required:</td>
</tr>
<tr>
<td>7. Dollar Value:</td>
</tr>
<tr>
<td>8. Type of Award:</td>
</tr>
<tr>
<td>9. Contact Information for Two Persons, Including Name, Job Title, Mailing Address, Phone Numbers, and Email Address</td>
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</table>
Cross Cutting Issues

The donor may require that you speak to and address other issues that impact the implementation of the project, for example:

- **Gender**: Conduct a gender analysis and incorporate activities into the application that will reduce any gender gaps in the expected program outcomes. A gender action plan is required as part of the work plan.

- **Youth**: Develop and implement youth-friendly service packages and employ a Positive Youth Development (PYD) approach and propose concrete and practical approaches.
Review, review, and review

1. Define your organization’s review milestones at different points in the proposal development process
2. Follow a consistent process for each review, give reviewers instructions
3. Identify staff who can serve as reviewers (separate from the proposal team) and train them in how to review, if needed

Examples of reviews:
• To assess the pre-planning strategy/goals
• To predict competitors’ likely solutions and strategies
• To verify compliance and execution of your win strategy
• To predict how the donor will evaluate your proposal and make improvements to it
• Review of the budget and approve pricing strategy
• To confirm your proposal incorporates necessary changes from previous reviews and is ready for proposal submission
• After-Action Review to record lessons learned and make improvements to your proposal development process
Budget Development

Go back to RFA and review what the cost presentation should look like and use/modify provided templates.

USAID will evaluate your cost proposal* and level of effort on three points.

1. Reasonable: Costs are generally recognized as ordinary and necessary.
2. Allocable: Costs are incurred specifically for the award.
3. Allowable: Costs are not disallowed by the terms of the award.

Coordination with other teams is key to successful budget development!

*For you and for each of your sub-partners
Budget Categories

U.S. GOVERNMENT CODE OF FEDERAL REGULATIONS AND FEDERAL REGULATIONS

BUDGET NARRATIVE
Explain all budget categories with sufficient details about how funds will be spent.

CONTRACTORS AND SUBCONTRACTORS (ACQUISITION)
AWARDEES AND SUBAWARDEES (ASSISTANCE)
GRANTEES AND SUBGRANTEES (ASSISTANCE)

INDIRECT COSTS
Apply your organization’s preapproved Negotiated Indirect Cost Rate Agreement (NICRA).

SALARIES AND WAGES
List the key personnel on your project. Note the requirements, salary limits, and cost thresholds.

FRINGE BENEFITS AND ALLOWANCES
Present fringe benefits as direct costs. Break down allowances by specific type.

OTHER DIRECT COSTS
Provide proper estimates for both operational and programmatic costs.

TRAVEL AND TRANSPORTATION
Separate domestic and international travel. Provide the number of trips and cost per trip.

CONSULTANTS
Clearly define labor costs and follow daily rates for consultants.

EQUIPMENT AND SUPPLIES
Break down and explain pricing for equipment and supplies.
Salaries and Wages

ASAP Salary Survey: In April 2021, ASAP administered an online salary survey to gather profile information about each local partner, including their number of current staff, staff salaries, salary scales if available, benefits information, and reasons for attrition.

Base Salary Comparisons: As shown in the figure below, most positions paid by local partners are paid below the 25th percentile market rate, according to the Birches Group survey.

![Base Salary Comparisons](chart.png)
Salaries and Wages

- The key takeaways:
  - Be aware of market standards for different positions and implement actions that will allow you to be competitive within the local job market.
    - Review salary scales and revise
    - Do comparisons within the market
    - Budget for the positions as needed for new awards
    - Advocate with USAID for what is needed to ensure you can hire and retain high caliber staff
**Budget**

- Make the Excel budget file specific and detailed as required by USAID and to meet the policies of your organization.
Indirect Costs

Typically include expenses that cannot be attributed to one activity, such as costs in the head office for implementing multiple activities.

Rates for indirect costs may be submitted in two ways:

- Established partners typically apply preapproved rates from a Negotiated Indirect Cost Rate Agreement (NICRA) with the Agency. Note: If you have a NICRA do not include costs in the budget that are covered by your indirect cost rate.

- New partners without a NICRA may opt to budget costs as “direct costs” or they may propose a rate, such as the 10-percent Modified Total Direct Costs also known as *de minimis* rate.
  - All Prime partners are required to provide 10% De Minimus to eligible subawardees. No supporting documentation is required.
**Cost Share**

- Cost share or "matching" refers to the resources a recipient contributes to the total cost of an agreement.

- It becomes a condition of an award when it is part of the approved award budget, is verifiable from the recipient's records, and must be reported on throughout the life of the project.

- Only non-USG funds can count towards cost share.

- Cost share can/should be flowed down to sub-partners, but be aware of the risks.

---

**Template B3: Cost Share Contributions**

<table>
<thead>
<tr>
<th>1. Partner staff time</th>
<th>[value in USD]</th>
<th>[contributor]</th>
<th>[cost category]</th>
<th>[brief description of the purpose]</th>
</tr>
</thead>
<tbody>
<tr>
<td>2. Equipment</td>
<td>[value in USD]</td>
<td>[contributor]</td>
<td>[cost category]</td>
<td>[brief description of the purpose]</td>
</tr>
<tr>
<td>3. Office Space</td>
<td>[value in USD]</td>
<td>[contributor]</td>
<td>[cost category]</td>
<td>[brief description of the purpose]</td>
</tr>
<tr>
<td>4. Venue</td>
<td>[value in USD]</td>
<td>[contributor]</td>
<td>[cost category]</td>
<td>[brief description of the purpose]</td>
</tr>
<tr>
<td>5. Materials/Equipment/Supplies</td>
<td>[value in USD]</td>
<td>[contributor]</td>
<td>[cost category]</td>
<td>[brief description of the contribution and its purpose]</td>
</tr>
<tr>
<td>6. Transportation</td>
<td>[value in USD]</td>
<td>[contributor]</td>
<td>[cost category]</td>
<td>[brief description of the contribution and its purpose]</td>
</tr>
<tr>
<td>7. Direct monetary contributions (project co-funding)</td>
<td>[value in USD]</td>
<td>[contributor]</td>
<td>[cost category]</td>
<td>[brief description of the purpose]</td>
</tr>
<tr>
<td>8. Other</td>
<td></td>
<td>[contributor]</td>
<td>[cost category]</td>
<td>[brief description of the purpose]</td>
</tr>
</tbody>
</table>

**COMMENTS/NOTES**
**Budget Narrative**

A budget narrative includes:

- Explanations of budget categories;
- Descriptions and justifications of each line item; and
- Sufficient detail to allow USAID to assess proposed costs and see precisely how its money will be spent.

To make it easier for reviewers to understand, ensure that your budget narrative follows the exact format of your detailed Excel budget.

Do not describe mathematical calculations; rather, explain the rationale for the proposed costs.
3.1.3 Short-term Technical Assistance (STTA) Expatriate/Consultants Flights
The budget includes 3 round-trip airfares at $1,500 on average per airfare from U.S. city to Almaty for consultants' travel to post. Airfare costs are based on current Fly America-compliant, refundable economy-class airfare quotes from our in-house travel agent from U.S. city to Almaty Kazakhstan. Three trips per year are budgeted for each program year.

3.1.4 Per Diem (Lodging and M&IE) and Ground Transport
Per diem is budgeted based on the rates provided in the Department of State Standardized Regulations (DSSR), Chapter 925. The following assumptions have been budgeted per diem:

a) International Travel Per Diem: Lodging and M&IE is budgeted at $316/day per the DSSR for international HQ, STTA, and international consultants. Each trip is budgeted for 14 days inclusive of travel days. We calculated per diem days based on the LOE budgeted under personnel for HQ, STTA, and international consultants.

b) Ground Transport: $150 per trip is budgeted for ground transport for HQ, STTA, and consultant travel to Kazakhstan.

<table>
<thead>
<tr>
<th>3. Travel</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>3.1 International Travel</td>
<td></td>
</tr>
<tr>
<td>3.1.1 Long-term Technical Assistance (LITA) Flights</td>
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</tr>
<tr>
<td>Modification/Deinstallation - One Way</td>
<td>1000 Total</td>
</tr>
<tr>
<td>3.1.2 Short-term Technical Assistance (STTA) - HQ</td>
<td></td>
</tr>
<tr>
<td>International Airfare - Washington DC to Almaty</td>
<td>RT</td>
</tr>
<tr>
<td>3.1.3 Short-term Technical Assistance (STTA) - Consultants</td>
<td></td>
</tr>
<tr>
<td>International Airfare - Washington DC to Almaty</td>
<td>RT</td>
</tr>
<tr>
<td>3.1.4 Per Diem (Lodging and M&amp;IE) and Ground Transport</td>
<td></td>
</tr>
<tr>
<td>International Travel Per Diem</td>
<td></td>
</tr>
<tr>
<td>Lodging and M&amp;E - Per Diem (Almaty)</td>
<td>Day</td>
</tr>
<tr>
<td>Ground Transport</td>
<td>Trip</td>
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<tr>
<td>3.2 Regional Travel</td>
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<td>International Airfare - Regional</td>
<td>RT</td>
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<td>Lodging and M&amp;E - Per Diem Dushanbe</td>
<td>Days</td>
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<td>Lodging and M&amp;E - Per Diem Ashgabat</td>
<td>Days</td>
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<tr>
<td>Lodging and M&amp;E - Per Diem Tashkent</td>
<td>Days</td>
</tr>
<tr>
<td>Ground Transport</td>
<td>Trip</td>
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<td>3.3 Local Travel</td>
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</tr>
<tr>
<td>Local Transportation</td>
<td>Month</td>
</tr>
<tr>
<td>Sub-total Travel</td>
<td></td>
</tr>
</tbody>
</table>
Proposal Finalization and Submission

On your calendar, leave plenty of time for:

• Copy editing - check for spelling errors, grammar, consistent word use, acronyms, etc.
• Formatting - don’t forget headers, footers, page numbers, signatures, alignment, tables, text boxes, graphics, etc.
• Final compliance check/sign off

Submission

• Submit your application 24 to 48 hours before the deadline
• Ensure the correct email address, copy others at your organization
• Review the solicitation and account for any email size restrictions or other instructions for submission
• Ask for confirmation of receipt from the donor (call the donor if needed)
Post-Submission

• Debrief with your team and discuss how you might improve the process for the next time you apply for an award.

• Prepare for USAID to come back with questions/clarifications on your application.

• If USAID notifies you that you weren’t successful, request in writing a debrief or a copy of USAID’s evaluation of your response (within 10 days of notification from USAID)

• Use this feedback to build expertise, enhance systems, and reassess alignment with donor priorities.
Thank you for your time.