

Solicitation Number:	USA072-PVL-2022-001
Issuance Date:	September 8, 2022
Clarification/Questions Due Date and Time:	September 20, 2022, by 5:00 pm EST
Closing Date and Time:	October 8, 2022, at 11:59 PM EST

Subject: Request for Quotations) for Developing a Cooperative Ecosystem under the American Rescue Plan Technical Investment Program.

Dear Potential Offeror:

The National Cooperative Business Association CLUSA International (NCBA CLUSA) is building a preferred vendor list to provide technical assistance to partners and selected grantees for the United States Department of Agriculture (USDA) funded *Developing a Cooperative Ecosystem* under the *American Rescue Plan Technical Investment Program*. This activity, managed by NCBA CLUSA, envisions a range of services that will be needed as described in the attached Request for Quotations (hereafter RFQ). NCBA CLUSA anticipates issuing Blanket Purchase Agreements (BPA) to qualifying organizations. Task orders for specific work will then be issued under the BPA. This will allow for a faster procurement and contracting process when NCBA CLUSA requires a technical assistance provider.

Section B of this solicitation sets out the activities that NCBA CLUSA plans to implement. NCBA CLUSA estimates that the ordering ceiling for BPAs resulting from this RFQ will be approximately \$100,000.00 over the 5-year ordering period. The ceiling is a current estimate and may be exceeded. This ceiling is not subdivided among the number of awardees, nor is it being multiplied by the number of awardees. There is no guarantee on the number, if any, of BPA-Task Orders that the qualifying organizations will receive.

Section C outlines the BPA-Ordering procedures, requirements, and reporting.

Section D sets forth instructions for the preparation and submission of the proposal; and specifies the required contents of the proposal. Please submit your proposal in accordance with the requirements in Section C of this solicitation. Section D also states the criteria by which the proposal will be evaluated, and the award made. Offerors are responsible for ensuring proposals are received by NCBA CLUSA by October 8, 2022, at 11:59 PM EST. Failure to comply with the submission date will deem any submission unacceptable and it will not be reviewed or evaluated.

This RFQ in no way obligates NCBA CLUSA to make an award nor does it commit NCBA CLUSA to pay any cost incurred in the preparation and submission of a proposal. An award under this RFQ is subject to the availability of funds and other NCBA CLUSA approvals. The final issuance of an award is subject to NBCA approval.

This RFQ can be viewed and downloaded from <https://ncbaclusa.coop/about-us/career-center/>. Questions and comments related to this RFQ must be in writing only and submitted electronically no later than September 20, 2022, by 5:00 pm EST to ARPA@ncba.coop. No questions will be accepted after the date. NCBA CLUSA will post all questions and responses for all offerors to access at the site above no later than September 27, 2022. Any amendments to this solicitation are occasionally issued

and will be posted on the same website page. NCBA CLUSA advises to check the website for amendments.

Sincerely,
Teia Evans – Project Director
Bernardo Penaherrera – Program Associate

SECTION A – SUPPLIES OR SERVICES AND PRICE/COSTS

A.1 Purpose

The *Developing a Cooperative Ecosystem* activity under the American Rescue Plan Technical Investment Program will deliver technical assistance and other programs to ensure improved understanding of United States Department of Agriculture (USDA) programs and services by tribal governments, communities, and individuals. As part of a team of interrelated USDA cooperators, NCBA CLUSA will provide an array of technical assistance specialized services that includes outreach, technical assistance, cooperative development training and support, financial training, capacity building training, and rural development to underserved farmers, ranchers and/or forest landowners.

A.2 Award Type and Services

This is a Blanket Agreement (BPA) type award. NCBA CLUSA will issue BPA task orders that are Firm Fixed Price or Fixed Amount Award (hereafter FFP) Type, depending on the requirements of US Government Regulations. The Awardee must perform the services set forth in BPA task orders at a process consistent with Section B of this BPA.

A.3 Estimated Award Ceiling

This is a multiple award Blanket Agreement with an estimated overall ceiling price of \$100,000.00 for this project. The ceiling is a current estimate and may not be exceeded unless amended. This ceiling is not subdivided among the number of awardees, nor is it being multiplied by the number of awardees.

A.4 Award Line Items (CLINs)

Firm fixed Price (FFP) Items for the duration of the project:

CLIN	Title
Technical Assistance	Component 1: Create culturally appropriate resources to develop and run cooperatively owned businesses
	Component 2: Develop a cadre of cooperative developers with economic and cultural ties and experience with historically underserved farmers and ranchers and agricultural producers and their communities
	Component 3: Research policy and regulatory factors that encourage sustainable cooperative development
	Component 4: Work directly with producers who are historically underserved in learning financial planning, business planning and tax planning through in-person and online conferences and training.

A.5 Labor

NCBA CLUSA has determined that a full-time technical manager is not necessary or required to administer the basic BPA. Awardees will not be authorized to bill NCBA CLUSA for BPA management costs under this BPA or under BPA task orders.

A.6 Travel

Local travel will be reimbursed under subsequent BPA task orders. Local travel will be negotiated under each task order and inserted into the task order as a reimbursable line item. Travel will be reimbursed in accordance with Federal Travel Regulations and applicable cost principles.

Section B: Description/Specifications/Statement of Work

B.1 Purpose

The *Developing a Cooperative Ecosystem* activity under the American Rescue Plan Technical Investment Program will deliver technical assistance and other programs to ensure improved understanding of USDA programs and services by tribal governments, communities, and individuals. As part of a team of interrelated USDA cooperators, NCBA CLUSA will provide an array of technical assistance specialized services that includes outreach, technical assistance, cooperative development training and support, financial training, capacity building training, and rural development to underserved farmers, ranchers and/or forest landowners.

B.2 Background

The U.S. Department of Agriculture (USDA), through section 1006 of the American Rescue Plan, is authorized to establish technical assistance and other programs to ensure improved understanding of USDA programs and services by tribal governments, communities, and individuals. USDA and NCBA CLUSA entered into a cooperative agreement for the delivery of outreach and technical assistance to historically underserved farmers and ranchers and agricultural producers.

B.3 Objectives

NCBA CLUSA will provide ongoing coordination and substantial involvement with USDA and will ensure that the plans for program development, curriculum development, deployment and evaluation of impact are closely coordinated with USDA. NCBA CLUSA is also required to co-coordinate with all other recipients of Section 1006 technical assistance (TA) resources in a manner as determined by USDA. NCBA CLUSA will incorporate principles, to the extent possible, into their technical support related to financial assistance, market access and market coordination, land/water/equipment access tools and techniques and key principles related to engagement in building critical agriculture infrastructure. NCBA CLUSA's role will support historically underserved farmers and ranchers and agricultural producers and their communities by creating a community-led cooperative development ecosystem and increasing the awareness of the cooperative model.

- Create culturally appropriate resources to develop and run cooperatively owned businesses.
 - Develop a Cooperative Launch Box and Good Governance Toolkit to gather, develop and make available documents needed for rapid start-up of cooperatives and running democratically controlled businesses; tailor materials for historically underserved farmers and ranchers and agricultural producers and their communities; pilot with historically underserved farmers and ranchers and agricultural producers and their communities and revise as needed; offer translation as needed; post all materials publicly.
- Develop a cadre of cooperative developers with economic and cultural ties and experience with historically underserved farmers and ranchers and agricultural producers and their communities.
 - Support the participation of TA providers working with historically underserved farmers and ranchers and agricultural producers and their communities to participate in cooperative development education courses

- Train the trainer education on cooperative development targeted to TA providers working with historically underserved farmers, producers, landowners and foresters.
- Mentor to mentor programs to link developers working with target groups to cooperative development centers for technical and cultural exchanges
- Peer network and TA monthly calls to support technical assistance providers
- Introduce and integrate cohorts into larger cooperative development communities through members in the national network of cooperative developers
- Research policy and regulatory factors that encourage sustainable cooperative development
 - Assess the current state agricultural and general cooperative enabling statutes in jurisdictions with significant numbers of historically underserved farmers and ranchers and agricultural producers to identify potential obstacles to cooperative development.
 - Consider other key federal or state regulations that impede the establishment of cooperatives.
 - Develop recommendations of ways to improve the statutory and regulatory environments to increase the creation and viability of cooperatives in target communities.
- Work directly with producers who are historically underserved in learning financial planning, business planning and tax planning through in-person and online conferences and training.
 - Create online training to assist members in understanding basic accounting and business plan development.
 - Create webinars to assist members in understanding basic accounting and business plan development.
 - Provide training for farmers to develop bank-ready business plans for their farms and ranches prior to submitting applications for capital funding.

B.4 Statement of Work

This BPA will support NCBA CLUSA's management of its cooperative agreement with USDA. It is critical that the Awardee engages NCBA CLUSA staff and managers, as well as with USDA Washington, DC and state representatives and other stakeholders for the success of this cooperative agreement. The Awardee shall provide sector-specific expertise and employ the most recent and innovative techniques and approaches in cooperative development, course content and development, and research while ensuring cost-effective provision of services.

The Awardee shall provide direct services and operational support to fulfill all potential requirements for four (4) components illustrated below. In advance of each activity, NCBA CLUSA will develop the scope of the work (SOW) to be performed, the specific areas to be reached and the specific beneficiaries to work with. The Awardee will use the SOW to develop and present a work plan and budget for NCBA CLUSA approval.

Component 1 - Create culturally appropriate resources to develop and run cooperatively owned businesses

The Awardee will develop cooperative training curricula and/or materials. These may be redesigned or customized existing materials and/or the development of new materials. These can include platforms,

apps and other digital tools. Topics will mostly range from feasibility analysis, business plan development, startups, training, facilitation, and education. The purpose is to provide accessible materials that will be used to develop successful cooperative businesses.

Component 2 - Develop a cadre of cooperative developers with economic and cultural ties and experience with historically underserved communities.

The Awardee will provide culturally appropriate training courses for our peer and mentor network. The program would provide training for developers to grow their cooperative knowledge and work with groups in the target community. The Awardee would be responsible for educating developers working with target groups and cooperative development centers. The purpose is to launch a train the trainer education program with CDC's and other organizations. Training courses will be targeted to technical assistance providers working with historically underserved farmers and ranchers and agricultural producers and their communities. The goal is to create partnerships between CDC's and other organizations.

Component 3 - Research policy and regulatory factors that encourage sustainable cooperative development

The Awardee shall assess the current state of agricultural and general cooperative enabling statutes in jurisdictions with significant numbers of historically underserved farmers and ranchers and agricultural producers to identify potential obstacles to cooperative development. Once the current state has been assessed, the Awardee shall clarify the findings and consider other key federal or state regulations that enable and impede the establishment and development of cooperatives in the United States among historically underserved farmers. The purpose is to develop recommendations of ways to improve the statutory and regulatory environments to increase the creation and viability of cooperatives in target communities.

Component 4 - Work directly with producers who are historically underserved in learning financial planning, business planning and tax planning through in-person and online conferences and training.

The Awardee shall create in-person and online trainings to assist members in understanding basic accounting and business plan development they shall execute the trainings and implement webinars to assist members in understanding basic accounting and business plan development. Finally, the Awardee shall provide training for farmers to develop bank-ready business plans for their farms and ranches prior to submitting applications for capital funding. The purpose is to provide the proper tools for the success of the cooperative and their ability to access USDA services.

Section C: Requirements/Qualifications/Reporting/Ordering Procedures

C.1 Requirements

The Awardee shall furnish services that include individuals having experience and expertise, both practical and conceptual, in the subject matter required by each order. NCBA CLUSA will define its needs in orders, which will be managed by NCBA CLUSA Project Manager.

The Awardee shall be responsible for ensuring qualified staff are available for the performance of this BPA. The Awardee must engage qualified staff with the experience and requisite qualification(s) to undertake this scope of work. All staff must be approved by NCBA CLUSA prior to assuming duties with the Awardee.

C.2 Positions and Qualifications

The Awardee shall provide the following positions for this award, as described below. The Contractor is not required to fill each position at this time. However, future task orders may require some or all the positions and the Contractor should understand the expected qualifications.

Senior Cooperative Development Specialist

A bachelor's or master's degree in cooperative development, business management, law or agriculture. Ten years of direct experience training or managing agricultural cooperatives. Experience and knowledge of USDA programs and working with rural and underserved communities and an understanding of their specific needs and challenges.

Mid-level Cooperative Development Specialist

A bachelor's or master's degree in cooperative development, business management, law or agriculture. Five years of direct experience training or managing agriculture cooperatives. Experience working with rural and underserved communities, and an understanding of their specific needs and challenges.

Junior Cooperative Development Specialist

A diploma or bachelor's degree in cooperative development, business management, law or agriculture or relevant professional experience. Two to three years of experience training or managing agricultural cooperatives. Knowledge of or experience with rural and underserved communities.

C.3 Performance Standards

Evaluation of the Awardee's performance must be conducted for each Call order in accordance with the performance standards set forth in the BPA-Call Order, if any, the Awardee's overall performance toward achievement of the objectives in Section C and provision of deliverables in Section F of the BPA-Call order, and the Awardee's compliance with all other terms and conditions of the BPA and BPA-Call order.

The Awardee's performance will be evaluated annually and at award completion, utilizing at minimum, the following factors:

- a) Technical (quality of product or service).
- b) Schedule/timeliness.
- c) Management or business relations.
- d) Small business utilization (as applicable).

- e) Other (as applicable) (e.g., late or nonpayment to sub awardees, trafficking violations, tax delinquency, failure to report in accordance with contract terms and conditions, defective cost or pricing data, terminations, suspension, and debarments).

Evaluations will be tailored to the BPA-Call order type, size, content, and complexity of the requirement.

C.4 Reports and Deliverables or Outputs

In addition to the requirements set forth for submission of reports in Sections C, the Awardee must submit required deliverables or outputs as specified in individual BPA-Call orders to the NCBA CLUSA employee specified in Section D.

Within 10 days of award of this BPA, the Awardee and NCBA CLUSA shall meet and agree on specific format/content for the reporting, invoicing, and procedure documents (such as Call Order template, call order format, work plan format, logistics documents, etc.) to be used throughout the duration for this BPA and all Call Orders. Within 15 days of the meeting, the Awardee shall submit templates for reporting, invoicing, and procedure documents. (BPA-Call order awards will contain separate reporting requirements).

C.5 Call Orders

- a) Each Call order will carry a specific order number which will be cited on each order placed against this BPA.
- b) In no event shall the aggregate total of all Call orders exceed the Maximum Ordering Limitation authorized in the BPA. All Call order statements of work and performance periods shall be within the scope of work and effective period of this BPA.
- c) Mandatory [2 CFR 200](#) clauses/provisions included in the BPA are applicable to Call orders as issued based on their individual scopes of work. Clauses and provisions remain applicable throughout the terms of the BPA and orders. Additionally, there may be clauses/provisions that apply only at the Call order level, as applicable.
- d) All Statements of Work and cost estimates for prospective Call orders must be approved by NCBA CLUSA for the Basic BPA prior to contact with the Awardee.

C.6 Ordering Procedures

- a) General
 - (1) To obtain services or other deliverables that are within the scope of this BPA, NCBA CLUSA may issue orders using any of the pricing types specified in the BPA.
 - (2) Awardee(s) must respond to the RFQ within the number of calendar days stated in the RFQ.
 - (3) No separate payment will be made to the Awardee for the cost to prepare, submit and/or negotiate a BPA-Call order proposal.
 - (4) The Awardee must not commence work until a signed BPA-Call order is issued and the Awardee is authorized by NCBA CLUSA.
- NCBA CLUSA must review the prospective BPA-Call Order requirement or statement of work (SOW). (NCBA CLUSA must negotiate and administer BPA-Call orders in accordance with the ordering procedures set forth herein. NCBA CLUSA must provide each Awardee a fair opportunity to be considered for each BPA-Call order (also referred to as "order") exceeding \$3,500 issued under this award unless one of the exceptions described in paragraph (b) Fair Opportunity Exceptions, applies. All Awardees (or all Awardees designated under a specific

sector) must be contacted and provided the opportunity to be considered before award of all orders. Although Awardees are not required to submit a proposal for every order request, all Awardees interested in providing services under the order must submit a proposal, inclusive of price.

b) Fair Opportunity Exceptions

- (1) NCBA CLUSA's need for supplies or services is so urgent that providing a fair opportunity would result in unacceptable delays.
- (2) Only one awardee can provide the supplies or services required at the level of quality required because the supplies or services ordered are unique or highly specialized.
- (3) The order must be issued on a sole source basis in the interest of economy and efficiency because it is a logical follow-on to an order already issued under the award, provided that all awardees were given a fair opportunity to be considered for the original order.

c) BPA- Call Order Ordering Procedures

- (1) Orders may be issued by NCBA CLUSA within the BPA statement of work described in Section C.
- (2) Each Order will carry a specific Order number which will be cited on each order placed against this BPA.

For assignments under Award's Component 1, 2, 3 and 4 and as needed specific services, NCBA CLUSA will send a Statement of Work/Requirements document to the Awardee to which the Awardee shall submit their abbreviated proposal and annual work plan that includes the estimated budget & narrative. The selection process will be based on the Lowest Price Technically Acceptable (LPTA) basis. Upon being selected, the Awardee will cocreate the procedures to deliver the statement of work with NCBA CLUSA, technical team and other stake holders. Upon approval, NCBA CLUSA will issue an executed (signed by NCBA CLUSA) Call Order to the Awardee.

The requested services shall be, and the Awardee shall only be obligated to perform those services that are, within the scope of the statement of work in Section C. The Awardee must immediately notify the NCBA CLUSA in writing if part of or the entirety of the services requested by NCBA CLUSA fall outside the scope of the statement of work in Section C of the award.

Section D: Proposal Submission Requirements and Evaluation Criteria

D.1 Questions Regarding Solicitation

Questions must be submitted via email no later than 09/20/2022 5:00PM EST, to ARPA@ncba.coop. Responses to questions will be posted on NCBA CLUSA website (<https://ncbaclusa.coop/>).

D.2 Instructions for Submittal

A contractor may bid on ALL, ONE, OR MULTIPLE of the listed components within this solicitation. A contractor is to bid on components relevant to their expertise and desire to do work with NCBA CLUSA. A contractor is only required to provide technical expertise for tasks bid on.

If any of the following items listed are not submitted with offer, the offer will not be considered. Submitted materials should be fully responsive to and consistent with the requirements of the solicitation and the evaluation criteria listed in Section

Offerors must submit:

- a. **Technical Proposal:** Technical Proposals shall specifically address the offeror’s technical expertise for one or more component(s) of the project as detailed in Sections A and B above: **(1 page maximum per component)**
 - Component 1: Create culturally appropriate resources to develop and run cooperatively owned businesses
 - Component 2: Develop a cadre of cooperative developers with economic and cultural ties and experience with historically underserved farmers and ranchers and agricultural producers and their communities
 - Component 3: Research policy and regulatory factors that encourage sustainable cooperative development
 - Component 4: Work directly with producers who are historically underserved in learning financial planning, business planning and tax planning through in-person and online conferences and training.
- b. **Past Performance Information:** All offerors must submit at least 3 years of experience demonstrating experience and ability to provide services described in this solicitation. This documentation shall include: **(2 pages maximum)**
 - **Name and contact information (address, telephone, and email) of client or organization supported.**
 - **Beginning and end dates of the work performed or continuing.**
 - **Description of services rendered.**
- c. **Specific Services Provided:** Offerors shall list their areas of expertise as related to this solicitation. Note, the project does not have specific services identified at this time and the offeror will not be evaluated on this. There is no page limit. The following table lists potential areas of expertise that will be needed:

Business Planning	Grant Writing	Start-up
Co-op Model Transition	Indigenous Law	Strategy
Cooperative Law	Legal	Co-op Training
Financial Literacy	Marketing	Virtual Co-op Training
Governance	Operations	Other: (explain)

- d. **Service Area(s):** Offerors shall list the geographic area(s) within the U.S. where they can perform the work. Note, the project does not have any specific location(s) identified and the offeror will not be evaluated on this. No page limit.
- e. **Linguistic Capabilities:** Please list the languages and/or dialects that your organization can support (e.g., Spanish, Creole, Navajo, Hmong). No page limit.

D.3 Proposal Format

The format of the proposal shall be:

1. Proposals shall be submitted in Portal Document Format (.pdf).
2. Pages shall be 8 ½ x 11. Typing fonts should be no smaller than Times New Roman font and 12 pitch.
3. Pages are numbered and all margins shall be one inch.
4. Please note page limitations above.
5. A cover page, which is not included in the page limitations, shall include:
 - a. Name and address of the Offeror
 - b. Name and contact information for the authorized individual(s) to submit on behalf of the offeror. Please include telephone numbers and email addresses.
 - c. Website of the offeror.

Discussions

Offerors should ensure their proposals are clearly representative of the suite of services they can provide as outlined in this BPA. NCBA CLUSA may award agreement(s) without discussions.

Email Proposals

Email proposals will be the only authorized form of submittal and must be sent to arpa@ncba.coop.