

Appendix 4 Negotiation Memo Template

[LOGO OF ORGANIZATION]

Memorandum of Negotiation (Acquisition)

Subcontractor Full Legal Name: [NAME OR MULTIPLE]		Subcontract no: [NUMBER]
Project Code: 3253-2302		
Total Subcontract Value: [MAXIMUM AMOUNT JOD]	Subcontract Obligated Amount:	Period of Performance: [DATES OF PERFORMANCE]
Project Name: [PROJECT NAME]	Prime Award No: [NUMBER]	Country of Performance: Jordan
Donor: [DONOR NAME]		

I. Type of Subcontract

- ☐ Cost Reimbursement Subcontract
- ☐ Fixed Price Subcontract
- ☐ Time-and-Material Subcontract
- ☐ IDIQ

II. Purpose and Objectives of the Subcontract:

[ADD PURPOSE AND OBJECTIVE OF EVALUATION]

[BELOW ARE TABLES TO SHOW THE DIFFERENT PROPOSALS.]

As a result of a procurement competition, those were shortlisted as follows:

#	Applicant	Cost
1		
2		
3		
4		

Deliverables for the contract are: [COPY ALL DELIVERABLES FORM THE SOW INTO THE TABLE]

#	Deliverable	Due Date
1		
2		
3		

III. Process of Selection

[EXPLAIN THE COMPETITION PROCESS - IN HOW THE SOW WAS DISTRIBUTED AND DEADLINE FOR PROPOSALS]

By the submission of proposal deadline of [DATE], USAID CIS received a total of XXX proposals. They were all eligible to be reviewed by the Evaluation Committee. A summary is outlined below:

[FOR EACH PROPOSAL PROVIDE A SUMMARY OF THE COMMITTEE'S COMMENTS]

#	Organization	Contcat Person	Committee Comments
1	XXX	XXX	<i>Sample: They submitted a very strong technical proposal and shared the research tools to show how they approached their stakeholders. They included gender considerations and a good mix of tools, they have also included the sample discussion guides and interviews with stakeholders which shows understanding of variety of tools for different stakeholders The timeline they proposed is very realistic and acceptable. the team they proposed has the relevant experience and they were able to demonstrate knowledge of the Civil Society sector. They worked on sector assessments and knows the dynamics in the field. The committee requested more clarifications on their staffing structure.</i>
2			
3			
4			
5			
6			

1. This subcontractor was selected through a competitive process. Yes ☒ No ☐

An evaluation committee was convened on [DATE] to review and evaluate the six proposal being all eligible.

The committee panel is described below:

Voting Members:

[ADD MEMBERS' NAMES AND TITLE]

Facilitator:

[ADD FACILITATOR'S NAME AND TITLE]

The eligible proposals were evaluated by the committee members against the following criteria:

- [ADD ALL CRITTERIA AS SHOW IN SOW & ASSOICATED POINTS] i.e. *Technical Approach (40 points)*

An evaluation score card was created for the Committee members to assess and score each eligible proposal. EC members reviewed the proposals prior to the meeting . Scores were finalized during the meeting and the results were as follow:

#	Applicant	[Member's Name] Score	[Member's Name] Score	[Member's Name] Score	Average Score
1	[NAME OF PROPOSAL/EVALUATOR]	[TOT SCORE]			

2	[NAME OF PROPOSAL/EVALUATOR]				
3	[NAME OF PROPOSAL/EVALUATOR]				
4	[NAME OF PROPOSAL/EVALUATOR]				
5	[NAME OF PROPOSAL/EVALUATOR]				
6	[NAME OF PROPOSAL/EVALUATOR]				

During the meeting, the EC discussed the merits and deficiencies of each proposal as a group.

[STATE THE SHORTLISTED PROPOSALS. STATE WHEN ALL WERE NOTIFIED OF THE RESULTS. STATE WHEN DONOR ORGANIZATION WAS INFORMED OF THE RESULTS. DESCRIBES THE STEPS TAKEN TO NEGOTIATE THE FINAL BUDGET AMOUNTS. PROVIDE ALL DETAILS REGARDING QUALIFICATION OF PROPOSALS]

IV. Summary of Evaluation of Offer(s)

As mentioned previously, all eligible proposals were evaluated against the following criteria:

- [ADD ALL CRITERIA AS SHOW IN SOW & ASSOICATED POINTS] *i.e. Technical Approach (40 points)*

Below is a summary of the evaluation and a justification of selection:

[PROVIDE REASONS FOR WHY 1 OR MORE PROPOSALS WERE CHOSEN BASED ON THE CRITERIA LISTED ABOVE]

V. Cost Analysis

Below is an outline of the proposed budget for each proposal:

[DISPLAY ALL REQUIRED COST CATEGORIES FOR EACH PROPOSAL. PROVIDE ANY IMPORTANT COST DETAILS DISCUSSED]

VI. Required Certifications and Other Statements of Subcontractor

[DISCRIBE ANY REQUIRED STATEMENTS FROM THE SUBCONTRACOR, IF APPROPRIATE]

VII. Subcontractor Qualifications:

Purchases shall be made from, and subcontracts shall be awarded to, responsible subcontractors only. To be determined responsible, a prospective subcontractor must -

[Check to indicate that a positive determination has been made.]

- ☐ Have adequate financial resources to perform the subcontract, or the ability to obtain them (i.e., will be in existence at the time of subcontract award).

- ☐ Be able to comply with the performance schedule taking into consideration all existing business commitments.
- ☐ Have a satisfactory performance record.
- ☐ Have a satisfactory record of integrity and business ethics.
- ☐ Have the necessary organization, experience, accounting and operational controls, and technical skills, or the ability to obtain them.
- ☐ Have the necessary production, construction, and technical equipment and facilities, or the ability to obtain them.

VIII. Special Donor Requirements and or Special Award Provisions

[ADD ANY SPECIAL REQUIRES, IF APPROPRIATE]

IX. Certifications:

The persons whose signatures appear below certify that all the statements contained in this memorandum are true and accurate. This certification also attests that this memorandum was prepared in accordance [ORGANIZATION'S NAME] and procedures, including the verification of the availability of obligated funds for this subcontract.

[The signatures below should not hang by themselves on a page.]

Prepared by: _____

Name and Title:

Date:

Endorsed by: _____

Name and Title:

Date: