



Issue Date: April 24, 2023

Deadline for Question: May 5, 2023; 16:00 EDT

Full Application Submission Date: June 16, 2023; 16:00 EDT

Subject: Notice of Funding Opportunity Number: 7200AA23RFA00009

Program Title: Global Health Program Evaluation, Analysis, Research and Learning (GH PEARL)

Dear Prospective Applicants:

The United States Agency for International Development (USAID) is seeking applications for a cooperative agreement from qualified entities to implement the Global Health Program Evaluation, Analysis, Research and Learning (GH PEARL). Eligibility for this award is not restricted.

USAID intends to make an award to the applicant(s) who best meets the objectives of this funding opportunity based on the merit review criteria described in this NOFO subject to a risk assessment. Eligible parties interested in submitting an application are encouraged to read this NOFO thoroughly to understand the type of program sought, application submission requirements and selection process.

To be eligible for award, the applicant must provide all information as required in this NOFO and meet eligibility standards in Section C of this NOFO. This funding opportunity is posted on www.grants.gov, and may be amended. It is the responsibility of the applicant to regularly check the website to ensure they have the latest information pertaining to this notice of funding opportunity and to ensure that the NOFO has been received from the internet in its entirety. USAID bears no responsibility for data errors resulting from transmission or conversion process. If you have difficulty registering on www.grants.gov or accessing the NOFO, please contact the Grants.gov Helpdesk at 1-800-518-4726 or via email at support@grants.gov for technical assistance.

USAID may not award to an applicant unless the applicant has complied with all applicable unique entity identifier and System for Award Management (SAM) requirements detailed in Section D.6.f. The registration process may take many weeks to complete. Therefore, applicants are encouraged to begin registration early in the process.

Please send any questions to the point(s) of contact identified in Section D. The deadline for questions is shown above. Responses to questions received prior to the deadline will be furnished to all potential applicants through an amendment to this notice posted to www.grants.gov.

Issuance of this notice of funding opportunity does not constitute an award commitment on the part of the Government nor does it commit the Government to pay for any costs incurred in preparation or submission of comments/suggestions or an application. Applications are submitted at the risk of the applicant. All preparation and submission costs are at the applicant's expense.

Thank you for your interest in USAID programs.

Sincerely,

/s/ Abibou Oussantidja

Abibou Oussantidja

Contracting/Agreement Officer

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SECTION A: PROGRAM DESCRIPTION

1. Authority

This funding opportunity is authorized under the Foreign Assistance Act (FAA) of 1961, as amended. The resulting award will be subject to 2 CFR 200 – Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards, and USAID’s supplement, 2 CFR 700, as well as the additional requirements found in Section F.

2. Background

As USAID-supported countries strive to reduce preventable child and maternal mortality and advance primary health care, they face increasingly complex challenges. They need to identify and pursue proven and innovative approaches to improve the quality, coverage and equity of family planning (FP) and reproductive, maternal, newborn, child health and nutrition (RMNCH+N) health interventions while also addressing emerging challenges such as pandemics, climate change, and expanding access to services to vulnerable populations as well as strengthening systems and capabilities at national and sub-national levels. The Global Health Program Evaluation, Analysis, Research and Learning (GH PEARL) mechanism is envisioned as providing global technical leadership with a broad range of cutting-edge activities in monitoring, evaluation, research and learning (MERL) along with related knowledge management and knowledge translation to provide USAID-supported countries with high-quality, actionable evidence to assess program effectiveness, identify and overcome barriers to program implementation, and guide decision making.

The design of GH PEARL recognizes the importance of linking countries and regional institutions to global standards, drawing upon advances in digital health; health services research; and the data, behavioral, and implementation sciences. GH PEARL builds upon MERL lines of work that were previously undertaken by centrally-managed awards including the Data for Impact (D4I) associate award under Measure Evaluation Phase IV; the Health Evaluation, Applied Research and Development (HEARD) award; and Coordinating Implementation Research to Communicate Learning and Evidence (CIRCLE) contract. This consolidation of work that was previously spread across multiple mechanisms is intended to increase efficiency and cost effectiveness, enhance collaboration on innovations, and expand global technical leadership and state-of-the-art measurement of the impact of global health activities by pooling a broad base of highly-skilled MERL experts in one mechanism.

The purpose of this activity is to support effective generation and use of high-quality data and evidence to strengthen policies and program implementation to improve health and save lives in low- and middle-income countries. GH PEARL will provide highly-skilled technical assistance with a quick turn-around time and attention to cost considerations to fill needs spanning the gamut from rigorous process and performance evaluations of projects and health portfolios to complex outcome, developmental, and impact evaluations, and costing analysis in USAID partner

countries. The broad spectrum of MERL provided by GH PEARL to support LMIC country-led efforts includes real-time measurement of results; innovative metrics; strengthened quality and use of FP/RMNCH+N elements in health information systems; improvements in data quality, analysis and visualization; site monitoring; and research.

GH PEARL will serve as a resource to monitor and evaluate programs, conduct research to fill evidence gaps, and improve understanding of barriers to optimal program operations and their root causes as well as building the capacity of other organizations to conduct similar work. Related knowledge translation and management services (KT/KM) will support host countries, Missions, and USAID/W by synthesizing and using findings to enhance collaboration, learning and adaptation (CLA) to improve policies and programs, drawing upon best practices from other MERL and KM activities, with the overall goal of accelerating progress toward sustainable development solutions.

3. USAID Context

GH PEARL will be a global award jointly managed by the Office of Maternal and Child Health and Nutrition (MCHN) and the Office of Population and Reproductive Health (PRH) in the Bureau for Global Health working in partnership with LMIC leaders, USAID missions and other stakeholders. This activity has been designed to support the Agency priorities and strategic frameworks that are listed briefly below.

- **Agency level priorities:** To support [localization](#), GH PEARL will have an explicit focus on MERL capacity strengthening for local public and private sector organizations and institutions that could serve as potential new partners or direct recipients of awards (including transition awards) in the future. The opportunities to capture local “voice” in MERL activities under this Award as well as the needs assessments of local partners will also be important ways to support localization. The knowledge translation and management component of GH PEARL will review evidence generated by these activities to contribute to answering agency and operating unit-level learning agenda research questions related to localization.

A second major agency priority is embodied in the principles of [USAID’s Gender Equality and Women’s Empowerment Policy](#) to analyze and address inequities and to achieve objectives outlined in [ADS 205](#). Applicants must ensure that project activities are responsive to gender considerations through data-driven analysis and seek to ensure that the assistance provided and the results achieved engage and are beneficial to both women and men. The Gender Analysis completed as part of this design is included in Annex 4.

- **Global Health Bureau-level priorities:** GH PEARL will directly support the strategic approach outlined in the [Preventing Child and Maternal Deaths \(PCMD\) framework](#) for effective generation and use of high-quality data and evidence to strengthen policies and program implementation, improve health, and save lives in USAID partner countries. Of

particular interest in this effort is a renewed emphasis on strengthening [primary health care](#). This activity should also take into account USAID's [Vision for Health Systems Strengthening 2030](#), with a particular focus on strengthening and sustaining equitable coverage and access to respectful, high quality of care.

- **Office level priorities:** The priority focus areas for [MCHN](#) are articulated in the [“Getting to 2030: Maternal and Child Health and Nutrition Technical Roadmap”](#) and for PRH the priorities are [family planning and reproductive health](#).

4. Technical approach

The purpose of this activity is to contribute to effective use of high-quality evidence to strengthen policies and program implementation to improve health and save lives in USAID partner countries. In order to achieve this goal, the project will provide USAID priority countries, communities, leaders, USAID implementing partners, and USAID operating units with technical expertise in a broad range of monitoring, evaluation, research and learning (MERL) activities. Related knowledge translation and management services (KT/KM) are designed to ensure that GH PEARL produces publishable quality materials and other products that directly contribute to collaboration, learning and adaptation (CLA) of effective programs, policies, and practices in LMIC countries. A primary focus of the technical content will be family planning (FP) and reproductive, maternal, newborn, child health and nutrition (RMNCH+N) health, as well as other priority areas of global health and sustainable development such as primary health care. Underlying these efforts will be a focus on collaborative stakeholder engagement to encourage sustainable development solutions to complex FP/RMNCH+N challenges in partnership with LMIC leaders and multi-sectoral partners.

In keeping with the agency's focus on localization described above, this mechanism will include directly supporting efforts to strengthen the capacity of local organizations and institutions engaged in MERL. By providing them with access to a pool of expertise, experience, mentoring and technical support, GH PEARL will address a major cross-cutting challenge for the potential local MERL partners whose engagement is critical for effective and sustainable country-led programs. As the technical capacity of these local organizations is strengthened over time, GH PEARL will contribute toward opportunities for locally-primed awards managed by a diverse base of partner organizations. Applicants are, thus, strongly encouraged to consider a range of partners including local or regional institutions in this work.

The following examples of the MERL and CLA work that could be undertaken are provided to illustrate the breadth and depth of the technical services that may be required as GH PEARL supports country programs and contributes to global technical leadership and innovations:

- **Rigorous and innovative monitoring** activities could include practical and potentially real-time reporting, learning and action approaches inclusive of site monitoring, improved data analysis using newer and higher-level analytical techniques such as interrupted time series analysis, group-based trajectory modeling, and use of routine data run charts to assess service disruptions in addition to better use of context monitoring to guide program adaptations. It may also include improving the strategic and

targeted use of performance and context monitoring indicators, processes, plans and systems. GH PEARL could support the development of theories of change for specific bilateral mechanisms, the health sector in a country as a whole or health integrated with other development sectors as well as assisting MOHs to develop national monitoring plans.

- **Rigorous evaluations** under GH PEARL will cover the range of process, performance and impact evaluations inclusive of LMIC evaluation priorities, USAID Mission bilateral programs (including government-to-government (G2G) instruments), health portfolios, and USAID/W global programs as USAID continues to build upon the foundations laid by the 2020 [Evaluation Policy](#). Newer approaches like **developmental evaluations** may also be included to support innovative thinking and adaptations in complex environments with embedded evaluators, flexible methods, and real-time learning to support conceptualizing, designing, and testing interventions that are new or adapting to major change and identifying the need for course corrections in a timely manner. **Economic evaluations** may include the systematic appraisal of costs and benefits to determine the relative efficiency of programs.
- **Research** in topics of interest to countries, Missions, and USAID may include operations research and implementation research to help measure impact and advance program coverage, equity, and sustainability. Examples of research may include understanding factors that create barriers to or facilitate the delivery of services, implementation of policies, or access to programs and their root causes. This research would include efforts to capture the “voice” of the local populations or marginalized communities who are hypothesized to benefit from these policies and programs to understand their perspectives. Some examples of research undertaken in prior projects include developing emergency transportation communications systems in urban areas, understanding patterns of care seeking among the urban poor who are navigating a complex array of public and private providers, studying ways to use community scorecards to improve quality of care, and exploring models to improve access to high-quality FP/RMNCH+N services for vulnerable populations. An example of potential future research could include the sustainability of FP and MNCH programs, commodity procurement, and supplies in countries that are transitioning away from USAID financial support.
- **Health policy and guidelines analysis and adaptation** to support countries and Missions to stay abreast of policies and guidance from global authorities such as UNICEF, WHO, and their regional offices and global initiatives such as FP2030 which need to be adapted to real-world context and country systems. Two recent examples of this type of work in prior MERL mechanisms were integrating possible serious bacterial infections (PSBI) into Integrated Management of Childhood Illness (IMCI) and the development of [WHO facility data use modules](#).

Cross-cutting MERL activities anticipated in the technical scope of the GH PEARL mechanism include the following:

- **Knowledge generation to fill evidence gaps using innovative and complexity-aware MERL approaches and best practices**, including design and conduct of implementation

research, developmental evaluation and complexity-aware monitoring approaches (e.g., Causal link Monitoring, Outcome Harvesting, Most Significant Change, and Contribution Analysis). These approaches can be used to support innovative, customized and adaptive evaluation and programming in complex and dynamic environments. A key example of this is supporting Missions in identifying and overcoming implementation barriers and programmatic roadblocks that impede access to care for vulnerable populations of mothers, infants and children in communities and urban settings and/or challenges to improving the patient experience of respectful, high-quality care. As needed, this may include using a social and behavioral change (SBC) lens to identify different experiences and seek ways to increase uptake of key behaviors related to home-based care, self care, care seeking, or quality of care. This could include innovative monitoring and evaluation techniques for programming (e.g. policy support) which are traditionally difficult to measure.

- **Innovative or improved FP/RMNCH+N metrics, data collection tools and guidance documents**, including conducting indicator validations and harmonization studies, contributions to global goods produced by FP/RMNCH+N-related metrics working groups led by WHO, the [Health Data Collaborative](#) working groups, the FP2030 working group, the family planning HIPs partnership or other groups. GH PEARL will support innovations in monitoring, evaluation and learning techniques and approaches that advance state-of-the-art measurement of impact in global health activities, supporting USAID/GH as a global leader in MERL. For example, the mechanism may further explore novel measures of concepts that are traditionally difficult to measure such as capacity building, resilience, governance, partnerships, inclusive development, and social accountability. It may also explore best practices to ensure meaningful inclusion of the local voices from marginalized groups through culturally appropriate, trauma-informed, and complexity-aware MEL approaches throughout the implementation of the Activity. GH PEARL could also support missions working with marginalized groups in participating countries to generate performance indicators that are meaningful and important to them in measuring progress towards their inclusive development outcomes.
- **Improved data quality, analysis, visualization and interpretation**, which could include analysis of cost drivers and constraints that impede coverage of key FP/RMNCH+N services, and ‘deep dives’ into data on mortality and morbidity to better understand underlying patterns, gaps and data quality limitations such as improving the classification of stillbirths and neonatal deaths that underlie the calculation of infant mortality and stillbirth rates. Support to address these limitations could include working with civil registration and vital statistics (CRVS) systems and/or conducting verbal and social autopsies or facility-based maternal, perinatal and child death audits. **Gender/inclusive development considerations** in monitoring, evaluation and research will be explored to determine whether the interventions addressing gaps in gender and marginalized groups have improved Activity outcomes and transformed gender and social norms, where applicable. (See also Gender Analysis) Similarly, this project would have the technical experience to support **data quality** and **data visualization** in dashboards, reports and other products to be used with stakeholders.

- **Strengthening FP/RMNCH+N elements of health information systems** focused on improvements to the **use and quality of FP/RMNCH+N data** (eg: validity, integrity, precision, reliability, and timeliness) in logistics and health management information systems in priority countries. This work may include capturing, analyzing, visualizing, mapping, sharing, reporting and using this data for related indicators and development of related tools for stakeholder engagement.
- **Strengthened culture of data demand and use** to support local partner organizations and government entities, Missions, and USAID/Washington operating units to develop and apply successful data **use** strategies in policy development, program design, and adaptive management.
- **Institutional capacity strengthening** for country government entities, local partners, universities, local research organizations and M&E networks as described in USAID's [Local Capacity Strengthening Policy](#) in a wide variety of MERL and CLA topics of interest such as management, design and implementation of monitoring, evaluation and research activities; sampling; data analysis (including statistical analysis); adaptive learning systems, processes and structures; new methods and approaches; and data visualization as mentioned above. The intentional approach to capacity building would use an organized curriculum tailored to the participating organizations and based on needs assessments that take into account the priority areas of work identified by those organizations as well as areas that are identified by global and regional organizations partnering with them and USAID missions. It could use a variety of approaches ranging from workshops and webinars to mentoring and co-development of activities so that local organizations “learn by doing” and are better prepared to lead MERL activities in the future.

As a corollary to the generation of new data and evidence from monitoring, evaluation and research work and the cross-cutting areas listed above, GH PEARL is envisioned as promoting learning within and across countries as well as USAID/W operating units. Illustrative examples of the knowledge management, documentation and dissemination-related work that is expected to be undertaken by this mechanism will build upon experiences and best practices to include the following:

- **Knowledge management** to complement related efforts under the Knowledge SUCCESS mechanism for family planning and reproductive health programs and the Momentum Knowledge Accelerator. GH PEARL will focus on capturing, synthesizing, and packaging quantitative and qualitative evidence and results of high-impact practices and implementation approaches into products that support program learning for maternal and child health and nutrition. It is anticipated that GH PEARL will do this by leveraging lessons learned and evidence from M&E and research on the global stage as well as providing support to enhance routine knowledge sharing and lessons learned from Mission projects. The dissemination approach may include developing a website, webinars, dynamic communities of practice, a user-friendly learning platform to facilitate access to key resources, publication of manuscripts and other learning products, and technical marketplace sessions at international conferences or other knowledge

management approaches. GH PEARL will seek to support local organizations to lead and/or facilitate these processes whenever possible and promote representation of local partners and leaders within dissemination efforts.

- **Knowledge translation** to support host country counterparts, stakeholders, Missions and regional institutions in adapting and applying the latest evidence from evaluations and research on high-impact practices to particular country contexts during project design, development of theories of change, and operational planning. This may include developing or promoting techniques for communicating findings from research and evaluation in engaging ways that spur the development or uptake of new policies and the shift from research to action. This could include working to integrate, plan and operationalize lessons in policies and programs.

5. Illustrative Results Framework

This project is envisioned as having both the technical capacity to *generate* new data and evidence through monitoring, evaluation and research activities—including, as needed, the development of new and improved metrics and methods—and the skills to strengthen the *capacity* of local organizations to undertake this work. The vision includes effective *use* of the data and evidence that are generated to underscore the need to not only develop resources but also synthesize the knowledge that is being gained and make it available at global, regional, national and subnational levels for use in strengthening policies and programs in ways that encourage sustainable development solutions and contribute to the PCMD goal of reducing preventable child and maternal deaths. The results framework presented below articulates USAID objectives for this activity and four intermediate results have been developed for GH PEARL along with illustrative indicators. Applicants may propose adjustments to the results framework in their application. It is expected that the results framework will be refined by the successful applicant post-award in collaboration with USAID.



	Narrative Summary	Illustrative Indicators ¹	Data Sources ²
Hypothesis: If there is effective generation and use of data to strengthen policies and programs, then health will be improved and lives saved.	GH Priority:		
	Project Goal: Effective generation and use of high-quality data and evidence to strengthen policies and program implementation to improve health and save lives in USAID partner countries.	Number of instances of methods, guidance documents, information systems and/or tools developed or improved with GH PEARL support that facilitated use of evidence to develop or strengthen policies or programs Number of global and national policies developed/updated with GH PEARL support	Program records Stakeholder survey(s)
	IR 1: Quality, availability and timeliness of monitoring, evaluation and research data and evidence for learning and action at global, regional, national and sub-national levels improved.	Number of studies, evaluations and analyses completed with GH PEARL support that are documented to impact program impact, effectiveness, and scale Number of data quality assessments and/or control processes implemented with GH PEARL support	Program records

¹ Indicators measure a particular dimension or characteristic of a result and are the basis for determining progress toward that result. These indicators are illustrative; once awarded, the project would develop project-level indicators in its AMELP to measure its performance in achieving project objectives and results. As the successful applicant further refines the illustrative indicators, the AOR team will expect to see the theory underpinning the connection of the indicators to GH PEARL work, assumptions, and definitions for the indicators used (eg - quality timeliness and availability of products would be defined by expectations set at the beginning of the activity or in their annual work plans.)

² Data sources specify where the indicator data will come from, and when it will be collected.

	IR 2. Local organizational capacity and systems to produce, analyze, visualize, interpret, report, disseminate, and use high-quality data for decision making strengthened.	Percentage of GH PEARL sub-activities led and implemented by local LMIC institutions Percent of GH PEARL-assisted organizations with improved performance³ Percent of training participants who met knowledge/skills targets post training Number of instances of resources developed by GH PEARL applied to strengthen technical and/or management capacity of local organizations Number of local data or monitoring systems strengthened with GH PEARL support including sub-national level Number of local organizations that take lead roles as presenters or facilitators at learning or knowledge sharing events and/or as lead authors of journal publications Amount and Percent of project resources allocated in sub awards to local organizations	Organizational capacity assessment tool (OCA, RECAP or OPI or other) Transition awards by Missions to local organizations that received capacity strengthening support from GH PEARL Pre-post training knowledge and skills tests Testimonials from Missions and organizations that received capacity strengthening Mission survey related to the perceived improvements in the MERL capacity of the local organizations Program records
	IR 3. Robust metrics, methods, guidance and tools for monitoring, evaluation, research and collaborative learning and adaptation designed or improved, tested, applied and disseminated.	Number of MERL/CLA methods, guidance documents, and tools developed or improved with GH PEARL support Number of indicators developed, validated, tested or revised with GH PEARL support Number of instances where new metrics, methods, guidance or tools developed by GH PEARL are used by target audiences and/or cited in global literature.	Program records Conference proceedings

³ GH PEARL will explore the potential to use these tools to track performance over time and respond to larger questions on the sustainability of the capacity strengthening efforts.

	IR4 4. Knowledge synthesis, translation and management to inform decision making at global, national and sub-national levels conducted.	Number of GH PEARL newsletter subscribers Number of knowledge sharing events held with GH PEARL support Number of national and international conferences at which GH PEARL has an accepted abstract Number of peer-reviewed journal articles developed with GH PEARL support Number of participants in GH PEARL-supported knowledge sharing events Number of downloads of knowledge products created by GH PEARL	Program records Program website metrics/Google Analytics Conference proceedings Journals
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6. Geographic Coverage and Target Populations

This award will work at the global level, with efforts that are anticipated to focus primarily on countries supported by programs in maternal and child health and nutrition and family planning and reproductive health and potentially the countries where the Global Health Bureau is working to [accelerate primary health care impact](#).

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SECTION B: FEDERAL AWARD INFORMATION

1. Estimate of Funds Available and Number of Awards Contemplated

USAID intends to award one Cooperative Agreement pursuant to this notice of funding opportunity. Subject to funding availability and at the discretion of the Agency, USAID intends to provide \$90 million in total USAID funding over a five year period. This total funding amount is inclusive of both core and mission field support. All funding will be provided on an incremental basis subject to the availability of funds and successful performance. USAID reserves the right to change the funding amounts, cycle, and terms of the agreement as a result of availability of funding, U.S. Government requirements or recipient performance. Should such changes occur, the recipient will be notified appropriately.

USAID intends to issue one cooperative agreement resulting from this funding opportunity to the responsible applicant who offers the best application in response to this NOFO's requirements, and that includes a calculation of costs that are reasonable and clearly explained. However, USAID may: (a) reject any or all applications, (b) accept other than the lowest cost application, and (c) waive informalities and minor irregularities in applications received. USAID also reserves the right to fund any one or none of the applications submitted.

This Activity will be able to accept funding from a variety of foreign assistance accounts to support health-related activities, including - but not limited to: Global Health Programs (GHP), Economic Support Fund (ESF), and International Disaster Assistance (IDA). The project will be authorized to accept funds from Missions, Regional Offices, Regional Bureaus, or USAID functional bureaus such as the Bureau for Global Health.

USAID provides funding for development work through two sources of funding: core funding provided from USAID/Washington (USAID/W) Offices and field support provided from USAID field Missions. USAID field Missions use Mission-based funding sources to "buy in" to centrally based projects to implement country-level activities. Activities funded by field support are expected to support and be aligned with that country's development priorities as part of the USAID mission portfolio of work. Field support funding provides Missions with the opportunity to access state-of-the-art services and take advantage of the technical leadership and oversight that centrally-managed USAID/W programs offer. USAID/W projects also serve as a mechanism to respond to urgent and rapidly evolving public health and development needs. USAID Mission staff and the AOR will be involved with the development of work plans in response to field support.

2. Expected Performance Indicators, Targets, Baseline Data, and Data Collection

GH PEARL will directly support the strategic approach outlined in the [Preventing Child and Maternal Deaths \(PCMD\) framework](#) for effective generation and use of high-quality data and evidence to strengthen policies and program implementation, improve health, and save lives in

USAID partner countries. The purpose of this activity is to provide global and low- and middle-income country (LMIC) stakeholders with monitoring, evaluation, research and learning (MERL); knowledge management and translation (KM/KT) linking country efforts to global standards and innovations; effective collaboration, learning and adaptation (CLA); and capacity strengthening to support the Agency's focus on localization.

The four intermediate results for GH PEARL are:

- 1) Quality, availability and timeliness of monitoring, evaluation and research data and evidence for learning and action at global, regional, national and sub-national levels improved.
- 2) Local organizational capacity and systems to produce, analyze, visualize, interpret, report, disseminate, and use high-quality data for decision making strengthened.
- 3) Robust metrics, methods, guidance and tools for monitoring, evaluation, research and collaborative learning and adaptation designed or improved, tested, applied and disseminated.
- 4) Knowledge synthesis, translation and management to inform decision making at global, national and sub-national levels conducted.

Indicators, targets, and data collection methods will be finalized during the development of the Activity Monitoring, Evaluation and Learning Plan (AMELP) in collaboration between the awardee and USAID. Illustrative indicators are provided in the Results Framework in Section A.

3. Start Date and Period of Performance for Federal Awards

The anticipated period of performance is five years. The estimated start date will be October 1, 2023 (subject to change).

4. Substantial Involvement

USAID considers collaboration with the Recipient crucial for the successful implementation of this project. Substantial involvement is deemed necessary and is, therefore, anticipated between USAID and the Recipient during the performance of this Award for the elements listed in this section.

(a) Annual Work Plans and Reporting Requirements

AOR approval of the annual work plans and any significant subsequent revisions is required. This includes planned activities and budgets, major capacity strengthening and knowledge sharing events, international travel, and concurrence on human subjects research study and evaluation protocols. USAID requires the approval of annual implementation plans to ensure alignment with stated goals, milestones and outputs in this Award. The Recipient must also submit all field-supported and other operating unit work plans to the AOR for approval if they are not included in the annual plan. The AOR will also review and approve annual and semi-annual performance

reports as well as the Final Report under this Agreement. (See also Section F: Reporting Requirements)

International travel that is anticipated at the time that the work plan is prepared may be included and approved as part of the work plan. International travel that is not included in the annual work plan submission and approval is subject to separate approval by the Agreement Officer's Representative.

Per the [Agency's research policy](#) and GH's operating procedure, all research and evaluation protocols developed under GH PEARL must be peer reviewed by USAID prior to finalization of the study designs. As appropriate, the Recipient may also wish to invite USAID staff to join design and data analysis workshops.

Research undertaken under this activity will be subject to the standards, terms and conditions of USAID including adherence to the spirit of Common Rule of Ethical Conduct, as well as compliance with the Agency's Open Data Policy ([blog](#), [fact sheet](#), [ADS 529](#)), and environmental regulations.

(b) Key Personnel

Concurrence from the AOR and approval from the AO are needed for the following positions and any subsequent changes:

- Project Director
- Deputy Director
- Technical Director
- Financial Director / Administrator

(c) Activity Monitoring, Evaluation and Learning Plan

Approval of the Activity Monitoring, Evaluation and Learning Plan (AMELP), including any significant changes or revisions thereto, is required to establish major milestones and program monitoring indicators, and performance targets which will demonstrate successful achievement of the results addressed in this Award and enable USAID to monitor progress toward the achievement of program objectives. This NOFO includes a Results Framework with illustrative indicators that articulates USAID's objectives for this activity as described in the Program Description. Applicants may propose adjustments to the Results Framework in their applications. It is expected that the Results Framework and a learning agenda will be further refined by the successful applicant post-award in collaboration with USAID as part of the AMELP development process. If PEPFAR funding is used, the Recipient will be required to conform with PEPFAR reporting requirements at country level.

(d) Subawards

USAID is expected to be involved in reviewing the planned scope of work for major subpartners. Specifically, the USAID operating units that are funding the work to be completed under a sub

award are expected to participate in technical review of the scopes of work and progress reports to monitor the technical quality and achievements of activities. Requests for approval of subawards should include a clear description of the work to be performed, the basis for selection of the sub-awardee, and a budget for each subaward as well as being in accordance with ADS 303.3.21. Once this review is complete, the AOR will approve sub-awards up to \$2 million. For sub-awards above \$2 million the AOR will provide concurrence, and the AO must approve the sub award. Please note that all sub-awards to foreign governmental organizations or parastatals of any amount including public universities and all contracts under this Cooperative Agreement must be approved by the AO, and possibly go through additional clearances.

(e) Agency and recipient collaboration or joint participation

When the recipient's successful accomplishment of program objectives would benefit from USAID's technical knowledge, the AO will authorize the collaboration or joint participation of USAID and the Recipient on the program. USAID's monitoring may include specific kinds of direction or redirection of the work because of the interrelationships with other projects or activities. If the Recipient establishes an advisory committee for programmatic or technical issues, USAID may participate as a member of this committee. As appropriate, the Recipient is encouraged to consider opportunities to involve USAID staff in protocol design, data analysis, and dissemination events and policy dialogue where USAID technical expertise and involvement facilitate translation and use of GH PEARL products into public health practice.

(f) Key strategies and Knowledge Products

USAID's Technical Advisors in Washington and/or Missions will provide technical input and the AOR will review and approve key strategic documents for this award including the gender strategy, any deviations from the planned activities that were not foreseen under the categorical exemption for environmental reporting or other statutory requirements, and the curriculum and capacity strengthening strategy for local organizations. The Recipient must also provide advance copies of major knowledge products developed for global technical leadership, research presentations and publications, IRB approvals, and presentations for knowledge sharing events.

5. Authorized Geographic Code

The geographic code for the procurement of commodities and services under this program is 937 (any area or country including the cooperating country, but excluding foreign policy-restricted countries) for the procurement of commodities and services. This code is further explained in ADS 310 Source and Nationality Requirements, which includes information on restrictions on and a list of advanced developing countries. Goods and services of an advanced developing country source or nationality may be purchased for a program in a country other than that advanced developing country only if a waiver is approved under Subpart D of 22 CFR Section 228 and ADS 310.3.4.

6. Nature of the Relationship between USAID and the Recipient

The principal purpose of the relationship with the Recipient and under the subject program is to transfer funds to accomplish a public purpose of support or stimulation of the GH PEARL award, which is authorized by Federal statute. The successful Recipient will be responsible for ensuring the achievement of the program objectives and the efficient and effective administration of the Award through the application of sound management practices. The Recipient will assume responsibility for administering Federal funds in a manner consistent with underlying agreements, program objectives, and the terms and conditions of the Federal award. The Recipient using its own unique combination of staff, facilities, and experience has the primary responsibility for employing whatever form of sound organization and management techniques may be necessary in order to assure proper and efficient administration of the resulting Award.

7. Transition awards

As explained in [ADS Reference 303mbb](#), *“transition awards can be an effective means for USAID to increase local engagement, promote self-reliance, foster, and strengthen local sustainability, and enhance the quality of the Agency’s relationship with local partners.” A transition award is an assistance award to a local entity or locally established partner (collectively referred to as local subrecipients) that is or has been a subrecipient under a USAID assistance award. A transition award can only be made when the following conditions have been met:*

- a. The recipient of the transition award is a local subrecipient that has not previously received a direct award from USAID;*
- b. The initial award required the recipient to develop the capacity of the local subrecipient(s) to become more capable of receiving a direct award from USAID or other donors; and*
- c. The initial award recipient recommended the local subrecipient for a potential transition award based on explicit criteria contained in the initial award.*

The terms “transition award,” “local entity,” and “locally established partner” are defined in ADS 303.6 – DEFINITIONS.

The Recipient must provide local subrecipients a subaward to carry out a distinct portion of the work in the award’s program description. (For example, in an evaluation activity, the Recipient may make an award to the local subrecipient to conduct the baseline data collection, analysis and report writing with the expectation that the subrecipient will receive a transition award to conduct the endline data collection, analysis and report writing or the Recipient may make a subaward for the first year of a monitoring activity with the expectation that the subrecipient will receive a transition award for the monitoring work in subsequent years.) Like all recipient and subrecipient relationships, the recipient is required to monitor the local subrecipient and is ultimately responsible for the local subrecipient’s work (see 2 CFR 200.331). After the recipient identifies a local subrecipient to USAID as having met the initial award capacity development criteria, the Agreement Officer (AO), in consultation with the Agreement Officer’s

Representative (AOR), may make the transition award consistent with the requirements in Section 5 of [ADS Reference 303mbb](#).

While it is USAID's intent to make transition awards to qualified local subrecipients as explained in Section A, there is no guarantee that the Agency will make a transition award. Decisions related to issuing a transition award are solely within USAID's discretion.

Prior to recommending a local subrecipient to USAID, the Recipient must demonstrate that the local subrecipient has met the following criteria:

- Has the necessary staff with the knowledge, skills, and experience to carry out MERL activities including the necessary FP/RMNCH+N content expertise and experience;
- Has demonstrated an ability to maintain relationships with stakeholders;
- Has financial management systems and internal controls;
- Has demonstrated management experience;
- Has the ability to use relevant IT systems or software needed to accomplish the MERL activity which is the basis of the transition award;
- Has the ability to monitor its own program performance in a cost-effective and efficient manner;
- Is registered in all applicable USG systems (for example, System for Award Management);
- Can meet any other pre-award requirements, including the risk assessment, as defined by the Agreement Officer.

The Recipient is responsible for developing the local subrecipient's capacity and tracking progress towards meeting the criteria for a transition award. To assist in this effort, the Recipient will conduct a baseline capacity assessment at the time any subaward is made to a potential transition award recipient, with a follow-up assessment prior to recommending the local subrecipient for a transition award. The content of the baseline capacity assessment will include the areas that the Recipient anticipates being needed by the subrecipient as well as areas of capacity that the subrecipient itself identifies as necessary for its further development. This 'stocktaking' will be considered as contributing to the Recipient's inclusion of 'local voice' in its program, which is an Agency metric for localization.

Finally, it is worth noting that USAID strongly encourages the Recipient to consider local organizations and institutions for sub awards (see localization) independently of any determination that they meet the criteria for a transition award in the future. For example, the Recipient may select a local organization that has worked with USAID in the past as a sub-awardee even though this organization would not be eligible for a transition award as well as inviting them to participate in capacity strengthening activities. The option to use transition awards is just one strategy for promoting localization.

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SECTION C: ELIGIBILITY INFORMATION

1. Eligible Applicants

Eligibility for this NOFO is not restricted.

USAID welcomes applications from organizations that have not previously received financial assistance from USAID.

USAID welcomes applications from local organizations. USAID defines a “local entity” as an individual, a corporation, a nonprofit organization, or another body of persons that:

- (1) Is legally organized under the laws of; and
- (2) Has as its principal place of business or operations in; and
- (3) Is
 - (A) majority owned by individuals who are citizens or lawful permanent residents of; and
 - (B) managed by a governing body the majority of who are citizens or lawful permanent residents of the country receiving assistance.

For purposes of this definition, “majority owned” and “managed by” include, without limitation, beneficiary interests and the power, either directly or indirectly, whether exercised or exercisable, to control the election, appointment, or tenure of the organization's managers or a majority of the organization's governing body by any means.

Faith-based organizations are eligible to apply for federal financial assistance on the same basis as any other organization and are subject to the protections and requirements of Federal law.

2. Cost Sharing or Matching

Cost sharing and matching are not required.

3. Other

Submitting organizations may only submit one application under this NOFO.

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SECTION D: APPLICATION AND SUBMISSION INFORMATION

1. Agency Point of Contact

Name: Banchiamlak Gizachew
Title: Contracting/Agreement Officer
Email: ghpearl@usaid.gov

2. Questions and Answers

Questions regarding this NOFO should be submitted by email to ghpearl@usaid.gov , no later than the date and time indicated on the cover letter. Any information given to a prospective applicant concerning this NOFO will be furnished promptly to all other prospective applicants as an amendment to this NOFO, if that information is necessary in submitting applications or if the lack of it would be prejudicial to any other prospective applicant.

3. General Content and Form of Application

Preparation of Applications:

Each applicant must furnish the information required by this NOFO. Applications must be submitted in two separate parts: the Technical Application and the Business (Cost) Application. This subsection addresses general content requirements applying to the full application. Please see subsections 5 and 6, below, for information on the content specific to the Technical and Business (Cost) applications. The Technical application must address technical aspects only while the Business (Cost) Application must present the costs and address risk and other related issues.

Both the Technical and Business (Cost) Applications must include a cover page containing the following information:

- 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);
- Title of proposed program (eg, GH PEARL)
- Notice of Funding Opportunity (NOFO) number
- Name of any proposed sub-recipients or partnerships, including consortia partners (identify if any of the organizations are local organizations, per USAID's definition of 'local entity' under ADS 303)

Applications signed by an agent on behalf of the applicant must be accompanied by evidence of that agent's authority, unless that evidence has been previously furnished to the issuing office.

Applicants may choose to submit a cover letter in addition to the cover pages, but it will serve only as a transmittal letter to the Agreement Officer. The cover letter will not be reviewed as part of the merit review criteria.

Applications must comply with the following:

- USAID will not review any pages in excess of the page limits noted in the subsequent sections. Please ensure that applications comply with the page limitations.
- Written in English.
- Use standard 8 ½" x 11", single sided, single-spaced, 12 point Calibri font, normal character spacing, 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 Calibri font can be used for graphs, charts, and references in footnotes. Tables however, must comply with the 12 point Calibri 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 B 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.

Applicants must review, understand, and comply with all aspects of this NOFO. Failure to do so may be considered as being non-responsive and may be evaluated accordingly. Applicants should retain a copy of the application and all enclosures for their records.

4. Application Submission Procedures

Applications in response to this NOFO must be submitted no later than the closing date and time indicated on the cover letter, as amended. Late applications will not be reviewed nor considered. Applicants must retain proof of timely delivery in the form of system generated documentation of delivery receipt date and time.

Applications must be submitted by email to ghpearl@usaid.gov . Email submissions must include the NOFO 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, and the desired sequence of the emails and their attachments (e.g. "No. 1 of 4", etc.). For example, if your cost application is being sent in two emails, the first email should have a subject line that states: "[NOFO number], [organization name], Cost Application, Part 1 of 2".

USAID's preference is that the technical application and the cost application each be submitted as consolidated email attachments, e.g. that you consolidate the various parts of a technical application into a single document before sending it. If this is not possible, please provide instructions on how to collate the attachments. USAID will not be responsible for errors in compiling electronic applications if no instructions are provided or are unclear.

After submitting an application electronically, applicants should immediately check their own email to confirm that the attachments were indeed sent. If an applicant discovers an error in transmission, please send the material again and note in the subject line of the email or indicate in the file name if submitted via grants.gov that it is a "corrected" submission. Do not send the same email more than once unless there has been a change, and if so, please note that it is a "corrected" email.

Applicants are reminded that email is NOT instantaneous, and in some cases delays of several hours occur from transmission to receipt. Therefore, applicants are requested to send the application in sufficient time ahead of the deadline. For this NOFO, the initial point of entry to the government infrastructure is the USAID mail server.

There may be a problem with the receipt of *.zip files due to anti-virus software. USAID servers may automatically reject emails with zip files. Therefore, applicants are discouraged from sending files in this format as USAID/Bureau for Global Health cannot guarantee their acceptance by the internet server. Applicants submitting zipped files do so at the risk that their application will not be received. The maximum size for an unzipped file is 5MB.

USAID bears no responsibility for data errors resulting from transmission or conversion processes associated with electronic submissions.

Each applicant must furnish the information required by this NOFO. Applicants must review, understand, and comply with all aspects of this NOFO. Failure to do so may be considered as being non-responsive and may be evaluated accordingly. Applicants should retain a copy of the application and all enclosures for their records.

5. Technical Application Format

In developing the technical application, the applicant should carefully consider all information contained in this NOFO. The technical application must be based on the overall description of the funding opportunity described in Section A and the evaluation criteria described in Section E. The Technical Application should be specific, complete, and presented concisely. The application should demonstrate the applicant's capabilities and expertise with respect to achieving the objective of the award. USAID may opt to exclude from further consideration any submission which is not within these parameters.

Information submitted as part of the technical application over 25 pages and not specifically excluded in the notes below will not be evaluated.

The format for the Technical Application is as follows:

- a) Cover Page (does not count toward 25 page limit)
- b) Table of Contents (does not count toward 25 page limit)
- c) List of Acronyms (does not count toward 25 page limit)
- d) Executive Summary
- e) Technical Approach
- f) Staffing and Management Plan
- g) Institutional Capacity
- h) Past Performance (does not count toward 25 page limit)
- i) Required Annexes (do not count toward 25 page limit):
 - Annex 1: Draft first four months' work plan (must not exceed 3 pages)
 - Annex 2: Draft Activity Monitoring, Evaluation and Learning Plan (AMELP) (must not exceed 3 pages)
 - Annex 3: Organizational Chart (must not exceed 1 page)
 - Annex 4: Job descriptions for each of the Key Personnel (must not exceed 1 page each)
 - Annex 5: Resumes of Key Personnel (must not exceed 3 pages each)
 - Annex 6: Key Personnel Letter of Commitment (maximum 1 page per person)
 - Annex 7: Letters of Commitment from Sub-Awardees (if any)

More details on the components of the Technical Application follow. Note that there is flexibility in the number of suggested pages for each section below as long as the application stays within the overall limit of 25 pages.

(a) Cover Page (See Section D.3 above for requirements) (1 page, not included in 25 page limit)

(b) Table of Contents (not included in 25 page limit)

Include major sections and page numbers.

(c) List of Acronyms (not included in 25 page limit)

(d) Executive Summary (suggested 1-2 pages)

This section should offer a succinct summary of the application as a whole, and should contain the information that the applicant believes best represents its proposed program, which may include an overview of the proposed technical approach, expertise and experience of the prime applicant and its proposed partners, project management approach, and technical and managerial resources to achieve the proposed project.

(e) Technical Approach (suggested 16 pages)

a. The Technical Approach should describe the vision and strategies the Applicant proposes to use to achieve the overall objective of this Activity in an integrated, creative, collaborative, and sustainable manner. Applicants should describe key approaches under

each of the four intermediate results (IRs) and how activities will contribute to achieving the overall goal of the Activity, with attention to both global technical leadership and advancing localization including the principles of [locally-led development](#) as outlined in the Program Description. The Applicant(s) should also describe what they see as the greatest challenges and opportunities for GH PEARL to accomplish the objectives of the NOFO and how they will organize themselves to address these challenges and opportunities.

b. Proposed implementation plan for the first four months of Activity start up (annex): Applicants must propose a start-up implementation plan (work plan) that is realistic and achievable, and that will allow for rapid initial start up and the ability to quickly respond to field support requests. In addition, the Recipient will develop and formalize relationships with key actors and create high-level learning themes with illustrative questions that will be refined during the first year of the project. During this initial period, the Recipient will work in close collaboration with the AOR and other USAID technical advisors to develop and finalize the AMELP, Work Plan, and Gender Strategy, and any necessary strategic guidance documents. The proposed implementation plan for the first four months should focus on activity start up and include a brief description of any strategic guidance documents the Activity will develop. Proposed activities should be realistic and achievable within the proposed budget and timeframe, and reflect a grasp of the necessary steps to ensure efficient, effective execution of program activities.

c. Activity Monitoring, Evaluation, and Learning Plan (in an annex, 5 pages maximum, not counted in the 25 page limit): The plan should include an outline of the program's development hypothesis and results framework/logical framework/theory of change and proposed indicators to be used to measure the achievement of the results building upon the Results Framework in this NOFO and explaining any refinements to the draft that are proposed in the application as well as the planned approach to sharing knowledge and lessons learned under this Award.

(f) Staffing and Management Plan (suggested 4 pages):

The applicant should propose a management plan consistent with the technical complexity of the proposed approach, that addresses its ability to manage overall operations and partnerships with organizations or institutions that would contribute to the accomplishment of the activities undertaken, and the objectives and IRs, within this NOFO. Applicants should explain how key personnel as well as other staff (including regional resident advisors, if any) provide the necessary skills to achieve the Results with special attention to covering the range of MERL, KM, KT and CLA that are explained in the Program Description with a broad bench of highly skilled technical staff. The staffing level and pattern may be increased or modified over time, if needed, to provide effective support to field programs as they evolve.

The management plan should include:

- If a consortium is proposed, strategies for ensuring effective and optimal use of proposed partners, while maximizing the cohesion of overall project activities. A description of the type or professional level of personnel from the partners, as well as any formal arrangements for a consortium, and with partner organizations and sub-awardees, should be indicated;
- The process for responding to central investments or Mission buy-ins, including decision-making around use of partners and local organizations;
- Strategies for ensuring effective communication and collaboration between project headquarters and field offices or country and/or regional resident advisors, as well as different technical units within project headquarters. Applicants may choose to include regional (resident) advisors as well as the senior headquarters team and should describe how they would contribute to technical quality, activity implementation and localization;
- The home office support including logistical support/coordination, administrative support, and personnel and financial management, with a focus on plans for assurance of timely and accurate management, disbursement, and reporting; and
- Proven practices to support cost containment, avoid duplication, and minimize institutional risk, which have been successfully applied by the prime or its partners in other large and complex programs.

The Staffing and Management Plan should also include the following annexes (not included in the 25 page limit):

1. Organizational chart: demonstrating clear roles and lines of communication between staff, and roles for any proposed sub-awardees (1 page maximum)
2. Key Personnel: Applicants must submit brief job descriptions (1 page max per position) and resumes for four Key Personnel.
 - i. Project Director
 - ii. Deputy Director
 - iii. Technical Director
 - iv. Financial Director / Administrator

Resumes (3 pages maximum for each person) must be submitted for each of the Key Personnel including background, qualifications, and past experiences that demonstrate the individual's ability to successfully fulfill the designated role.

Illustrative position descriptions are provided below. The Recipient may make adjustments to this in the application:

The **Project Director** is responsible for providing the overall strategic direction and managerial and technical leadership to ensure the achievement of the Program Description (Section A). S/he will have principal responsibility for representation of the

project to USAID. He/she may engage in implementing field or global activities under this award as time and expertise permit. He/she should have at least 15 years of experience in conducting MERL activities in developing countries, USAID project management experience, problem solving and interpersonal skills, and a relevant master or higher degree. S/he must demonstrate ability to manage a project of this magnitude and complexity with at least 8 years of experience in leading, managing, and implementing large international health and/or development projects.

The **Deputy Director** will provide operations and management leadership along with MERL technical expertise and may engage in implementing field or global activities under this award as time and expertise permit. He/she will oversee efficient planning, the development of core and field support work plans, overall project management and budgeting as well as timely submission of technical reports, work plans, performance reports and other key deliverables for GH PEARL as a whole. S/He should have at least 10 years of USAID or other donors' project management experience, and a relevant master or higher degree.

The **Technical Director** will provide technical direction and oversight of activities under this award focusing on technically sound activity planning and study design as well as timely submission of high quality MERL technical products including technical reports, policy briefs and peer-reviewed manuscripts. S/He should have a master or higher degree and at least 10 years expertise relevant to multiple MERL technical areas applied to reproductive, maternal, newborn or child health and/or nutrition and family planning as well as demonstrated experience with USAID program management.

The **Financial Director / Administrator** will have overall responsibility for financial management of the project. He/She will also oversee business functions and operational processes to ensure policies adhere to USAID regulations and guidelines. S/He should have at least 10 years financial management experience with USAID or other donors. A masters or MBA or a related advanced finance/accounting training is desirable.

(g) Institutional Capacity (suggested 3 pages):

This section of the application provides information about the applicant's capability to undertake this program. If applying as a consortium, the relevant contributions of all partner members should be included in the context of how they increase the ability of the Prime applicant to successfully implement the approaches described in the technical narrative and the distinct role each consortium member will play across the four intermediate results. The following information must be described:

1. The extent of the applicant's current available core competencies in MERL and FP/RMNCH+N content, capacity strengthening capability, ability to respond to the Agency's vision on localization as described in this NOFO, unique institutional resources, and global reach, as relevant to the current NOFO.

2. Concise description of the applicant's capacity to identify prospective partners, build viable and sustainable partnerships, and engage and/or work to strengthen local organizations and institutions.

(h) Past Performance (1-2 pages per organization/partner as an annex):

The applicant should summarize the past performance record of each partner (Prime and any consortium member/partner) to demonstrate their track record in effectively implementing programs of similar nature, magnitude and complexity, touching on the following points, as appropriate for their role(s) as described in **Section (f) Staffing and Management Plan**:

- Quality of products or services (including the extent to which the partner has a proven track record of global technical expertise and innovations)
- Areas of technical expertise (eg: monitoring, evaluation, research, capacity strengthening, knowledge management, knowledge translation/learning, etc.)
- Timeliness and cost control
- Effective technical and human resource management of monitoring, evaluation and research

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SECTION E: APPLICATION REVIEW INFORMATION

GH PEARL Evaluation criteria

The merit review criteria prescribed here are tailored to the requirements of this particular NOFO. Applicants should note that these criteria serve to: (a) identify the significant matters which the applicants should address in their applications, and (b) set the standard against which all applications will be evaluated.

Technical and other factors will be evaluated relative to each other, as described here and prescribed by the Technical Application Format. The Technical Application will be scored by a Selection Committee (SC) using the criteria described in this section.

Criterion	Criterion Name
Criterion 1	Technical Approach
Criterion 2	Management and Staffing Approach
Criterion 3	Institutional Technical Capacity

1. Technical approach

- **Vision and strategies:** The narrative should be well-conceived, specific, feasible, and reflect state-of-the-art knowledge and approaches to achieve the overall objective and the four intermediate results in the Results Framework of the GH PEARL award. It should include describing the project's vision, guiding principles and strategies, including one for assessing needs and strengthening capacity for monitoring, evaluation, research and learning (MERL) among local and regional organizations or networks with the goal of enabling some local organizations and institutions to function independently in future MERL procurements.
- **Feasibility of the proposed GH PEARL approach:** The narrative should describe a realistic, feasible project approach building on the Results Framework that

describes the greatest challenges anticipated in advancing the objectives described in this NOFO and how the applicant or consortium will organize its efforts, assess, and adjust to address these challenges.

- **Collaboration:** The narrative should describe an approach to collaborate with a diversity of partners, including local and regional evaluation, research and training organizations or institutions; policy makers; program implementers; other relevant partners from USAID partner countries; and USAID.
- **The proposed plan for rapid start-up** of the program that ensures the availability of key personnel.
- **Performance and activity monitoring:** The narrative should describe how the applicant intends to monitor its own program and activity performance in a cost-effective, innovative, and efficient manner.
- **Knowledge translation and management:** The narrative should describe the planned approach to sharing knowledge and lessons learned under this award with other national, regional and global organizations and institutions.

2. Staffing and Management Plan (Organizational Structure)

- **Key personnel:** The extent to which the proposed candidates for the Key Personnel positions meet or exceed the minimum qualifications described in the NOFO and possess the skills and experience necessary to contribute to global technical leadership and to lead GH PEARL to accomplish its objective and intermediate results.
- **Staff and organizational structure** (staffing configuration), information management and financial management practices and systems are designed to enable the project to effectively and efficiently accomplish the activity objective and intermediate results. Applicants should ensure that the staffing plan shows overall how the full extent of the Program Description can be covered with a broad bench of highly qualified staff.

3. Institutional Technical Capacities

- **Demonstrated MERL expertise:** The application should describe the types of MERL activities that the applicants (including the prime and its partners, if it forms a consortium) have conducted in the past and an illustrative list of countries where this work was performed. The applicant should review the Program Description, ensuring that the narrative clearly describes its technical capacity in monitoring, evaluation, research, health policy and guidelines analysis and adaptation, capacity strengthening, and knowledge management/knowledge translation as well as cross-cutting work in the development of new metrics, data collection tools and guidance, and strengthening quality, analysis and use of FP/RMNCH+N elements of health information systems. The narrative should touch upon both traditional MERL approaches as well as more cutting-edge work that the applicant has undertaken.

- **Demonstrated health content expertise:** The application should describe MERL expertise in family planning, reproductive health, maternal, newborn and child health and nutrition (FP/RMNCH+N) program content. Other areas of content expertise in global health may also be included.
- **Demonstrated expertise in organizational capacity strengthening in MERL for sustainable development:** The application should cover expertise in assessing needs and building MERL capacity among local and regional organizations or networks.

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SECTION F: FEDERAL AWARD ADMINISTRATION INFORMATION

Reporting requirements

- a. Quarterly Financial Reports: The Recipient must submit the Federal Financial Form (SF-425) electronically on a quarterly basis to USAID/M/CFO/CMP (ei@usaid.gov) within 30 days following the end of each quarter corresponding to USAID's fiscal year from October 1st through September 30th. The Recipient must submit a copy of the SF-425 at the same time to the Agreement Officer and the AOR.
- b. Quarterly Accruals: On a quarterly basis, the Recipient will submit accruals reports to the AOR. These reports will be due 15 days before the end of each quarter. This information will help the AOR to ensure that the activity has an adequate pipeline to conduct its work. Quarterly accruals must contain at a minimum the following information:
- Total funds obligated to date by USAID into the award;
 - Total funds expended to date, including a breakdown of the budget categories with additional detail to be provided upon request by the AOR;
 - Projections for the next two (2) quarters;
 - Pipeline (obligated funds minus expended funds);
 - Funds and time remaining in the award; and
 - Breakdown of expenditures by type of funding.

Additional information related to financial accruals and pipeline of funds may be requested to clarify the accruals. If requested, this information will be due within 10 calendar days of the request.

- c. Final Financial Report: The Final Financial Report shall be due within 90 days following the expiration of this Award. The Recipient must submit an electronic copy of all final financial reports to USAID/Washington, M/CFO/CMP-LOC Unit, the Agreement Officer, and the AOR. The recipient must submit an electronic version of the final Federal Financial Form (SF-425) to USAID/M/CFO/CMP (ei@usaid.gov) in accordance with paragraph (a) above.
- d. Foreign Tax Reports: Standard reports will be issued for each Fiscal Year and delivered to the AOR prior to April 16th of each year.

• Work Planning and Performance Reporting

The Recipient will be required to submit the work plans and periodic performance reports listed below electronically to the AOR in accordance with 2 CFR 200.329. In addition to this routine reporting, the Recipient must immediately notify USAID of developments that have a significant impact on the award such as problems, delays or adverse conditions which materially impair the ability of the Recipient to meet the objectives of this Cooperative

Agreement. This notification must include a statement of the action taken or contemplated and any assistance needed to resolve the situation.

a. Annual Implementation Plans (Work Plans)

Within 30 days of the effective date of award, the Recipient must submit for review the “start up” work plan for the first four months of its activities (eg, Oct 1, 2023 to Jan 31, 2024). USAID will provide written comments to the Recipient within 15 days of receipt. The Recipient shall then submit the revised Implementation Plan to the AOR for approval not later than 15 days from receipt of USAID's comments and/or suggestions on the draft plan.

By December 31, 2023, the Recipient will submit for review an *annual* work plan that builds upon the initial start up work plan to cover the period from the effective date of the Award through September 30, 2024. USAID will provide written comments to the Recipient within 20 days of receipt. The Recipient shall then submit the revised Implementation Plan to the AOR for approval not later than 15 days from receipt of USAID's comments and/or suggestions on the full draft plan.

Annual Implementation Plans for subsequent years will cover each fiscal year (October 1 – September 30) and are due to the AOR no later than 30 days before the beginning of each USG fiscal year on October 1.

Annual Implementation Plans will display expected activities per quarter to achieve the annual performance targets, as specified in the Activity Monitoring Evaluation and Learning Plan (AMELP). Annual Implementation Plans shall include a timeline and benchmark indicators for achieving the objectives of all major activities that will be undertaken, the rationale behind these activities, the anticipated results of these efforts, and a narrative that explains how they support the key objectives of the award and how they will be measured.

Annual Implementation Plans will describe activities to be conducted at a greater level of detail than in the Program Description but must take care not to change the Program Description unless prior approval from the Agreement Officer has been received.

The Recipient will work with the AOR throughout the Annual Implementation Plan development process to ensure that the Plan appropriately reflects activity objectives, the results framework, and the Program Description.

Annual Implementation Plans should include all sections described in the initial Implementation Plan. In addition, the subsequent Annual Implementation Plans shall review the activities of the year that is ending, the results achieved, any major challenges that existed, and how they were addressed. These subsequent Annual Plans may recommend program adjustments to reflect any lessons learned. As with the initial Implementation Plan, the AOR will review the plan and provide written comments and recommendations to be incorporated within 15 days of receipt, into the final version submitted to the AOR for

approval. All substantial subsequent changes in the Annual Implementation Plan require prior written approval of the AOR.

The Recipient should not submit the Implementation Plan to USAID's Development Experience Clearinghouse (DEC).

b. Activity Monitoring, Evaluation and Learning Plan (AMELP):

The Recipient shall submit an electronic copy of the draft Activity Monitoring, Evaluation and Learning Plan (AMELP) to the AOR within 90 days of the award. The AMELP will cover the full period of the Cooperative Agreement and should be revised as needed in response to changes in the activities, context or results framework that occur during the life of the project. The AMELP will include proposed indicators for measuring progress toward achieving the project results, baseline data, and targets throughout the life of the project. Also, the Recipient will develop a Performance Indicator Sheet (PIRS) for each indicator in the AMELP. The AMELP must include, but not necessarily be limited to, the following:

- Outline of the program's development hypothesis and results framework/logical framework/theory of change which establishes and tracks a set of required, standard, and custom indicators to be used to measure the achievement of the results building upon the draft Results Framework in the NOFO.
- Baseline data for the indicators and targets for each indicator to measure performance annually and at the end of the program.
- Description of how data will be collected, stored, analyzed and used.
- Description of how the Recipient will monitor program interventions, measure results, ensure data quality, and use data to inform ongoing activities.
- Description of the approach to collaborating, learning, and adapting (CLA) that outlines actions and a framework for how the Recipient will effectively collaborate and work with stakeholders to share knowledge and reduce duplication of effort, learn from program implementation, systematically draw on evidence from a variety of sources, periodically reflect on implementation, and apply learning by adapting intentionally to improve program results. This should include illustrative learning questions.

Once the AMELP is approved, the learning agenda may be developed and added as an Annex. The learning agenda will include (1) a set of questions addressing critical knowledge gaps, (2) a set of associated activities to answer them, and (3) products aimed at disseminating findings and designed with usage and application in mind.

USAID staff (including Monitoring and Evaluation (M&E) Specialists in the USAID AOR team) will review and approve the Recipient's AMELP to ensure that it is appropriate for the activities to be undertaken as part of the Cooperative Agreement and for compliance with the M&E guidance established by USAID's 2020 [Evaluation Policy](#) or other guidance otherwise applicable to this Cooperative Agreement.

USAID will provide written comments and suggestions on the AMELP to the Recipient within

15 days of receipt, and the Recipient shall finalize the plan no later than 15 days from receipt of USAID's comments and suggestions.

At some point during the life of the project, USAID may commission an external performance evaluation to assess progress toward the objectives and expected results of the project. The evaluation will adhere to the principles outlined in USAID's Evaluation Policy and ADS 201. The evaluation methodology and questions will be determined by the USAID AOR Team in consultation with GH colleagues and evaluation specialists. Data collected by the project under its AMELP will feed into this external evaluation. The recipient will cooperate with the external evaluation team to carry out the performance evaluation by providing access to project files and other documentation, facilitating access to project beneficiaries and stakeholders, and providing any other information and assistance deemed necessary to complete the evaluation.

The Recipient should not submit the AMELP to USAID's DEC.

b. Gender Strategy

Within 90 days of the project award date, the Recipient must submit a Gender Strategy to the AOR for approval. The Gender Strategy should demonstrate how women and other marginalized groups will be included in all Activity interventions. The Gender Strategy must demonstrate how the impact of the Activity contributes to reducing gender gaps and empowering women. Key findings and recommendations from gender analyses should be integrated and operationalized at all levels of project implementation including in the objectives, results, monitoring, evaluation, learning, and reporting. The Gender Strategy must clearly describe actions that the project will consider in order to combat all types of discrimination and promote equality. Of special emphasis here is the participation of women from local MERL organizations and institutions in capacity strengthening activities and leadership roles in developing knowledge products for this award or making formal presentations at webinars, training events, etc.

c. Semi Annual Performance Reports

The Recipient must submit an electronic copy of each Semi Annual Performance Report to the AOR during the life of this Award. The Recipient shall submit the reports in accordance with USAID's reporting schedule, with Q1 (October 1 to December 31) and Q2 (January 1 to March 31) included in one semi-annual report and Q3 (April 1 to June 30) and Q4 (July 1 to September 30) included in the Annual Performance Report.

Semi annual reports are due no later than 45 days after the end of the reporting period outlined above. The reports must report on progress made toward achieving targets and results in activities in the approved work plan, and they should describe any necessary adjustment of activities and timelines that will be undertaken in the following reporting period. The following is provided as an illustrative list; further discussion on the format of the semiannual performance report will be determined in collaboration with the AOR after the Award is made:

- Progress on major activities as laid out in the approved annual workplan and performance indicators in the AMELP during the performance period including progress and/or issues related to gender and sustainability.
- Any implementation problems and proposed remedial actions, as appropriate.
- A statement and/or a description of environmental compliance activities undertaken, as appropriate.
- Additional pertinent information, when appropriate, related to reporting requirements, analysis, and explanation of cost overruns or high unit costs reported in financial reports.
- List of all documentation submitted to the USAID Development Experience Clearinghouse (DEC) and Data Development Library (DDL) during the reporting period.
- Certification that all participant training information has been entered in a database for in-country, third country, and U.S based learning activity.
- As an annex, at least one success story with information on the project's outcomes, results, and/or impact during the reporting period, beginning with the second reporting period. (USAID can provide a template.) Success stories on the performance of local organizations that have participated in capacity strengthening activities and global technical leadership activities would be of particular interest.

USAID will provide written comments and suggestions on the Semi Annual Performance Report to the Recipient within 20 days of receipt, and the Recipient shall finalize the report no later than 20 days from receipt of USAID comments and suggestions.

Upon receiving AOR approval of the Semi Annual Performance Report, the Recipient shall submit an electronic copy of the approved report to the Agreement Officer and the AOR in addition to uploading it to the USAID's DEC following the submission instructions on the DEC website at: <http://dec.usaid.gov>.

e. Annual Performance Reports

The Recipient must submit an electronic copy of each Annual Performance Report to the Agreement Officer and to the AOR no later than 45 days following the end of the reporting period (October 1-September 30). The Annual Performance Report must reflect the progress of the program activities over the last year against the implementation plan/performance targets. The report should indicate the outputs and impact the program is having on the target beneficiaries. Annual and cumulative-to-date data should be included. Success stories and case studies, pictures and any other information that give insight into the success of the project should be included.

The format and content of the Annual Performance Report will be similar to the Semi Annual Report described above. The Recipient shall discuss with the AOR any issues identified as a result of these reports, including, but not limited to, data quality and cost issues, to determine appropriate follow-up actions, including providing additional information as necessary to clarify performance issues.

USAID will provide written comments and suggestions on the Annual Performance Report to the

Recipient within 20 days of receipt, and the Recipient shall finalize the Annual Performance Report no later than 20 days from receipt of USAID's comments and suggestions.

Upon receiving AOR approval of the Annual Performance Report, the Recipient shall submit an electronic copy of the approved report to the Agreement Officer and the AOR and in addition to uploading it to USAID's DEC following the submission instructions on the DEC website at: <http://dec.usaid.gov>.

f. Other Reports

At times, other technical or thematic reports may be requested by key stakeholder groups. For example, the implementer may be requested by a USAID Mission to develop a country report that provides a summary of the progress, achievements, and issues surrounding field activities. Another example is a summary of activities for USAID's annual reporting to Congress. The exact format of these requested reports and related indicators will be determined in collaboration with the AOR and Technical Advisor and submitted to the USAID AOR.

g. Project Website and Archive Maintenance

The implementer of this project shall have the capability to provide a Section 508 compliant project website and a web-based archive system. The project website shall include an external component that is used to communicate with the public about project activities as well as an internal component that is used to manage documentation associated with the implementation of project activities.

h. Development Data Library (DDL) Data Sharing

The recipient must submit to the Development Data Library (DDL) at www.usaid.gov/data, in a machine-readable, non-proprietary format, a de-identified copy of any structured dataset created in performance of this award with USAID funding in compliance with [USAID's Open Data Policy](#), including datasets produced by a sub awardee. The submission must include supporting documentation describing the dataset, such as code books, data dictionaries, data gathering tools, notes on data quality, and explanations of redactions.

i. Demobilization Plan for Close Out

Ninety (90) days prior to the completion date of the Award, a Close-Out/Demobilization Plan, will be submitted to USAID. The plan must include:

- Current financial status report with a thorough pipeline analysis to ensure that there are sufficient funds available to finalize activities and complete all requirements. The prime Recipient will be responsible for including any severance pay in the accruals for this Agreement and financial planning at least six months before the planned end of the project.

- The timeline for the Final Financial Status Report.
- An inventory and proposed disposition plan of residual non-expendable property, including the proposed disposition of unused supplies of \$5,000 or more in aggregate and equipment or vehicles with a per-unit fair-market value greater than \$5,000 which were purchased or furnished under the award. The plan should describe when this equipment will be available to be transferred to other projects or partners. (Note: Equipment including laptops with a current per-unit fair-market value of **less than \$5,000** may be retained, sold or otherwise disposed of at the discretion of the Recipient, but for project management purposes it will be helpful to include this equipment in a separate grouping in the inventory.)
- A request for disposition instructions for this property will be sent to the AOR with the inventory and proposed disposition plan. The AOR will coordinate with the Agreement Officer to obtain approval for the plan and any additional instructions. The Recipient will not begin the disposition process until the Agreement Officer has approved the plan.
- Recipient/subgrantee/partnership phase-out plan.
- Status of all program audit reports per the Award provisions.
- Final audit report timeline.
- Personnel phase-out timeline (who is expected to serve in what capacity until when).

j. Final Report

The Recipient shall submit to the AOR a draft Final Report 30 days prior to the estimated completion date of the Award. USAID will provide written comments and suggestions on the Final Report to the Recipient within 15 days of receipt. Once reviewed by the AOR, the Recipient shall submit one copy of the Final Report to the AOR and a copy to the Agreement Officer (electronically) within 60 days after completion of this Award. The report will be submitted in lieu of the final annual report. It should not include politically sensitive or proprietary information.

The Final Report shall contain the following information, covering the full period of the Award. The report should incorporate graphics (maps, photos, charts, etc.) and should include program and evaluation tools and materials, either as appendices or as links to materials on the Award's website (See Section G above).

The final performance report shall contain, at a minimum the following information:

- (i) An executive summary of the accomplishments and results achieved including success stories from the final six months of the project;
- (ii) An in-depth analysis of progress and results that synthesizes achievements of all organizations that contributed towards program objectives. This section should clearly describe activities, major accomplishments and results achieved, including results for all of the activities under this Award organized by intermediate result;
- (iii) Final quantitative and qualitative data and evidence, compared to baseline data, for all indicators included in the monitoring and evaluation plan for associate award

activities. This section should include disaggregated data by gender, historically disenfranchised groups, and other relevant groups identified as well as reporting on progress in advancing Gender as explained in Section B above and Annex 4;

(iv) A summary of problems/obstacles encountered during the implementation, and how those obstacles were addressed and overcome, if appropriate;

(v) Lessons learned, best practices, and other findings from this Award, along with recommendations for future programming and/or applying these findings and lessons learned to other similar contexts.

(vi) A brief narrative on the sustainability of the work completed under the Award with particular attention to increased capacity of local and regional organizations that received support and available evidence of that increased capacity.

(vii) A summary statement on environmental compliance to confirm that the Recipient's activities are consistent with the Categorical Exclusion.

(viii) A summary statement confirming that the Recipient and its partners and sub grantees followed best practices in human subjects protection, including obtaining IRB review and approval and informed consent in MERL activities as per 22 CFR 225.103.

(ix) A comparison of actual expenditures with budget estimates, including analysis and explanation of cost overruns or high unit costs, and any other pertinent information.

The detailed format of the Final Report will be developed in conjunction with the AOR. Upon receiving AOR approval of the Final Report, the Recipient shall submit an electronic copy of the approved Final Report to the AOR and the Agreement Officer and post the report on USAID's DEC website at: <http://dec.usaid.gov>.

k. Other Reporting Requirements

Development Information Solution (DIS): Implementing partners may be required to access and input data into the Development Information Solutions (DIS), DIS Partner Portal, and report activity indicator results into DIS for review and approval by the Agreement Officer's Representative (AOR). Implementing partners will be able to generate reports in the Partner Portal on their activities. Through the Partner Portal, implementing partners will be able access the Development Experience Clearinghouse (DEC) and the Development Data Library (DDL) to upload documents. Partners may be requested to complete the following tasks in DIS throughout the duration of the activity:

- Monitor baselines and targets for their activities (assigned by AOR)
- Submit indicator results during the open reporting period (directly on the DIS interface or as an Excel template upload)
- Leave comments and explanations regarding performance results
- Submit photos or documents in support of activities
- Receive system-generated approvals from AOR

- Run reports for their activities
- Assign geographic locations for activities.
- Field visit reports
- Other relevant progress reports related to the current reporting period

Access to DIS will depend on the implementing partner's internal reporting processes in support of USAID activities. The implementing partner may request access for multiple users through their AOR. The implementing partner will work with their AOR to determine what data and documents should be uploaded to DIS. These will include any relevant activity-level documents containing monitoring information. If required by the AOR, the DIS data input will be the responsibility of the implementing partner.

L. Program Income

No program income is anticipated.

M. Environmental Compliance

The Foreign Assistance Act of 1961, as amended, Section 117 requires that the impact of USAID's activities on the environment be considered and that USAID include environmental sustainability as a central consideration in designing and carrying out its development programs. This mandate is codified in Federal Regulations (22 CFR 216) and in USAID's Automated Directives System (ADS) Parts 201.5.10g and 204 (<http://www.usaid.gov/policy/ADS/200/>), which, in part, require that the potential environmental impacts of USAID-financed activities are identified prior to a final decision to proceed and that appropriate environmental safeguards are adopted for all activities. Applicant environmental compliance obligations under these regulations and procedures are specified in the following paragraphs of this NOFO.

In addition, the recipient must comply with host country/countries environmental regulations unless otherwise directed in writing by USAID. In case of conflict between host country and USAID regulations, the latter shall govern.

No activity funded under this CA will be implemented unless an environmental threshold determination, as defined by 22 CFR 216, has been reached for that activity, as documented in a Request for Categorical Exclusion (RCE), Initial Environmental Examination (IEE), or Environmental Assessment (EA) duly signed by the Bureau Environmental Officer (BEO). (Hereinafter, such documents are described as "approved Regulation 216 environmental documentation.").

As part of its initial Work Plan, and all Annual Work Plans thereafter, the recipient, in collaboration with the USAID Agreement Officer Representatives and Mission Environmental Officer or Bureau Environmental Officer, as appropriate, shall review all ongoing and planned

activities under this CA to determine if they are within the scope of the approved Regulation 216 environmental documentation.

If the recipient plans any new activities outside the scope of the approved Regulation 216 environmental documentation, it shall prepare an amendment to the documentation for USAID review and approval. No such new activities shall be undertaken prior to receiving written USAID approval of environmental documentation amendments.

Any ongoing activities found to be outside the scope of the approved Regulation 216 environmental documentation shall be halted until an amendment to the documentation is submitted and written approval is received from USAID.

A provision for subawards is included under this award; therefore, the Recipient will be required to use an Environmental Review Form (ERF) or Environmental Review (ER) checklist using impact assessment tools to screen subaward proposals to ensure the funded proposals will result in no adverse environmental impact, to develop mitigation measures, as necessary, and to specify monitoring and reporting. Use of the ERF or ER checklist is called for when the nature of the grant proposals to be funded is not well enough known to make an informed decision about their potential environmental impacts, yet due to the type and extent of activities to be funded, any adverse impacts are expected to be easily mitigated. Implementation of sub-grant activities cannot go forward until the ERF or ER checklist is completed and approved by USAID. The Recipient is responsible for ensuring that mitigation measures specified by the ERF or ER checklist process are implemented.

The Recipient will be responsible for periodic reporting to the USAID AOR, as specified in the Program Description of this award.

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SECTION G: FEDERAL AWARDING AGENCY CONTACT(S)

1. NOFO Points of Contact

Banchiamlak Gizachew
Contracting & Agreement Officer
Office of Acquisition & Assistance, GH Division
1300 Pennsylvania Avenue, NW, SA-44, Room 553R
Washington, DC 20523
Phone: 202-916-2719
Email; ghpearl@usaid.gov

2. Acquisition and Assistance Ombudsman

The A&A Ombudsman helps ensure equitable treatment of all parties who participate in USAID's acquisition and assistance process. The A&A Ombudsman serves as a resource for all organizations who are doing or wish to do business with USAID. Please visit this page for additional information: <https://www.usaid.gov/work-usaid/acquisition-assistance-ombudsman>

[The A&A Ombudsman may be contacted via: Ombudsman@usaid.gov](mailto:Ombudsman@usaid.gov)

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SECTION H: OTHER INFORMATION

- 1.** USAID reserves the right to fund any or none of the applications submitted. The Agreement Officer is the only individual who may legally commit the Government to the expenditure of public funds. Any award and subsequent incremental funding will be subject to the availability of funds and continued relevance to Agency programming.
- 2.** Branding Strategy and Marking Plan

The apparently successful applicant will be asked to provide a Branding Strategy and Marking Plan to be evaluated and approved by the Agreement Officer and incorporated into any resulting award.

A. Branding Strategy – Assistance (June 2012)

- a. Applicants recommended for an assistance award must submit and negotiate a "Branding Strategy," describing how the program, project, or activity is named and positioned, and how it is promoted and communicated to beneficiaries and host country citizens.
- b. The request for a Branding Strategy, by the Agreement Officer from the applicant, confers no rights to the applicant and constitutes no USAID commitment to an award.
- c. Failure to submit and negotiate a Branding Strategy within the time frame specified by the Agreement Officer will make the applicant ineligible for an award.
- d. The applicant must include all estimated costs associated with branding and marking USAID programs, such as plaques, stickers, banners, press events, materials, and so forth, in the budget portion of the application. These costs are subject to the revision and negotiation with the Agreement Officer and will be incorporated into the Total Estimated Amount of the grant, cooperative agreement or other assistance instrument.
- e. The Branding Strategy must include, at a minimum, all of the following:
 - (1) All estimated costs associated with branding and marking USAID programs, such as plaques, stickers, banners, press events, materials, and so forth.
 - (2) The intended name of the program, project, or activity.

- (i) USAID requires the applicant to use the “USAID Identity,” comprised of the USAID logo and landmark, with the tagline “from the American people” as found on the USAID Web site at <http://www.usaid.gov/branding>, unless Section VI of the NOFO states that the USAID Administrator has approved the use of an additional or substitute logo, seal, or tagline.
 - (ii) USAID prefers local language translations of the phrase “made possible by (or with) the generous support of the American People” next to the USAID Identity when acknowledging contributions.
 - (iii) It is acceptable to cobrand the title with the USAID Identity and the applicant's identity.
 - (iv) If branding in the above manner is inappropriate or not possible, the applicant must explain how USAID's involvement will be showcased during publicity for the program or project.
 - (v) USAID prefers to fund projects that do not have a separate logo or identity that competes with the USAID Identity. If there is a plan to develop a separate logo to consistently identify this program, the applicant must attach a copy of the proposed logos. Section VI of the NOFO will state if an Administrator approved the use of an additional or substitute logo, seal, or tagline.
- (3) The intended primary and secondary audiences for this project or program, including direct beneficiaries and any special target segments.
- (4) Planned communication or program materials used to explain or market the program to beneficiaries.
- (i) Describe the main program message.
 - (ii) Provide plans for training materials, posters, pamphlets, public service announcements, billboards, Web sites, and so forth, as appropriate.
 - (iii) Provide any plans to announce and promote publicly this program or project to host country citizens, such as media releases, press conferences, public events, and so forth. Applicant must incorporate the USAID Identity and the message, “USAID is from the American People.”
 - (iv) Provide any additional ideas to increase awareness that the American people support this project or program.
- (5) Information on any direct involvement from host-country government or ministry, including any planned acknowledgement of the host-country government.

- (6) Any other groups whose logo or identity the applicant will use on program materials and related materials. Indicate if they are a donor or why they will be visibly acknowledged, and if they will receive the same prominence as USAID.
- f. The Agreement Officer will review the Branding Strategy to ensure the above information is adequately included and consistent with the stated objectives of the award, the applicant's cost data submissions, and the performance plan.
 - g. If the applicant receives an assistance award, the Branding Strategy will be included in and made part of the resulting grant or cooperative agreement

(END OF PRE-AWARD TERM)

B. Marking Plan – Assistance (June 2012)

- a. Applicants recommended for an assistance award must submit and negotiate a “Marking Plan,” detailing the public communications, commodities, and program materials, and other items that will visibly bear the “USAID Identity,” which comprises of the USAID logo and landmark, with the tagline “from the American people.” The USAID Identity is the official marking for the Agency, and is found on the USAID Web site at <http://www.usaid.gov/branding>. Section VI of the RFA or APS will state if an Administrator approved the use of an additional or substitute logo, seal, or tagline.
- b. The request for a Marking Plan, by the Agreement Officer from the applicant, confers no rights to the applicant and constitutes no USAID commitment to an award.
- c. Failure to submit and negotiate a Marking Plan within the time frame specified by the Agreement Officer will make the applicant ineligible for an award.
- d. The applicant must include all estimated costs associated with branding and marking USAID programs, such as plaques, stickers, banners, press events, materials, and so forth, in the budget portion of the application. These costs are subject to the revision and negotiation with the Agreement Officer and will be incorporated into the Total Estimated Amount of the grant, cooperative agreement or other assistance instrument.
- e. The Marking Plan must include all of the following:

(1) A description of the public communications, commodities, and program materials that the applicant plans to produce and which will bear the USAID Identity as part of the award, including:

- (i) Program, project, or activity sites funded by USAID, including visible infrastructure projects or other sites physical in nature;
- (ii) Technical assistance, studies, reports, papers, publications, audio- visual productions, public service announcements, Web sites/Internet activities, promotional, informational, media, or communications products funded by USAID;
- (iii) Commodities, equipment, supplies, and other materials funded by USAID, including commodities or equipment provided under humanitarian assistance or disaster relief programs; and
- (iv) It is acceptable to cobrand the title with the USAID Identity and the applicant's identity.
- (v) Events financed by USAID, such as training courses, conferences, seminars, exhibitions, fairs, workshops, press conferences and other public activities. If the USAID Identity cannot be displayed, the recipient is encouraged to otherwise acknowledge USAID and the support of the American people.

(2) A table on the program deliverables with the following details:

- (i) The program deliverables that the applicant plans to mark with the USAID Identity;
- (ii) The type of marking and what materials the applicant will use to mark the program deliverables;
- (iii) When in the performance period the applicant will mark the program deliverables, and where the applicant will place the marking;
- (iv) What program deliverables the applicant does not plan to mark with the USAID Identity, and
- (v) The rationale for not marking program deliverables.

(3) Any requests for an exemption from USAID marking requirements, and an explanation of why the exemption would apply. The applicant may request an exemption if USAID marking requirements would:

(i) Compromise the intrinsic independence or neutrality of a program or materials where independence or neutrality is an inherent aspect of the program and materials. The applicant must identify the USAID Development Objective, Interim Result, or program goal furthered by an appearance of neutrality, or state why an aspect of the award is presumptively neutral. Identify by category or deliverable item, examples of material for which an exemption is sought.

(ii) Diminish the credibility of audits, reports, analyses, studies, or policy recommendations whose data or findings must be seen as independent. The applicant must explain why each particular deliverable must be seen as credible.

(iii) Undercut host-country government “ownership” of constitutions,

laws, regulations, policies, studies, assessments, reports, publications, surveys or audits, public service announcements, or other communications. The applicant must explain why each particular item or product is better positioned as host-country government item or product.

(iv) Impair the functionality of an item. The applicant must explain how marking the item or commodity would impair its functionality.

(v) Incur substantial costs or be impractical. The applicant must explain why marking would not be cost beneficial or practical.

(vi) Offend local cultural or social norms, or be considered inappropriate. The applicant must identify the relevant norm, and explain why marking would violate that norm or otherwise be inappropriate.

(vii) Conflict with international law. The applicant must identify the applicable international law violated by the marking.

f. The Agreement Officer will consider the Marking Plan's adequacy and reasonableness and will approve or disapprove any exemption requests. The Marking Plan will be reviewed to ensure the above information is adequately included and consistent with the stated objectives of the award, the applicant's cost data submissions, and the performance plan.

g. If the applicant receives an assistance award, the Marking Plan, including any approved exemptions, will be included in and made part of the resulting grant or

cooperative agreement, and will apply for the term of the award unless provided otherwise.

(END OF PRE-AWARD TERM)

3. Applications with Proprietary Data

Applicants who include data that they do not want disclosed to the public for any purpose or used by the U.S. Government except for evaluation purpose, should mark the cover page with the following:

“This application includes data that must not be duplicated, used, or disclosed – in whole or in part – for any purpose other than to evaluate this application. If, however, an award is made as a result of – or in connection with – the submission of this data, the U.S. Government will have the right to duplicate, use, or disclose the data to the extent provided in the resulting award. This restriction does not limit the U.S. Government’s right to use information contained in this data if it is obtained from another source without restriction. The data subject to this restriction are contained in sheets {insert sheet numbers}.”

Additionally, the applicant must mark each sheet of data it wishes to restrict with the following:

“Use or disclosure of data contained on this sheet is subject to the restriction on the title page of this application.”

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ANNEX 1 - SUMMARY BUDGET TEMPLATE

	Cost Category	Year 1	Year 2	Year 3	Year 4	Year 5	TOTAL
a.	Personnel						
b.	Fringe Benefits						
c.	Travel						
d.	Equipment						
e.	Supplies						
f.	Contractual						
g.	Other Direct Costs (ODCs)						
h.	Total Direct Charges						
i.	Indirect Charges						
j.	Total Government Costs						
k.	Cost Share						
l.	TOTALS						

—END OF ANNEX 1 —

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ANNEX 2 - STANDARD PROVISIONS

(Note: the full text of these provisions may be found at:

<https://www.usaid.gov/ads/policy/300/303maa> and

<https://www.usaid.gov/ads/policy/300/303mab>). The actual Standard Provisions included in the award will be dependent on the organization that is selected. The award will include the latest Mandatory Provisions for either U.S. or non-U.S. Nongovernmental organizations. The award will also contain the following “required as applicable” Standard Provisions:

Please note that the resulting award will include all standard provisions (both mandatory and required as applicable) in full text.

REQUIRED AS APPLICABLE STANDARD PROVISIONS FOR U.S. NONGOVERNMENTAL ORGANIZATIONS

Required	Not Required	Standard Provision
TBD		RAA1. NEGOTIATED INDIRECT COST RATES - PREDETERMINED (NOVEMBER 2020)
		RAA2. NEGOTIATED INDIRECT COST RATES - PROVISIONAL (Nonprofit) (NOVEMBER 2020)
		RAA3. NEGOTIATED INDIRECT COST RATE - PROVISIONAL (Profit) (DECEMBER 2014)
		RAA4. INDIRECT COSTS – DE MINIMIS RATE (NOVEMBER 2020)
		RAA5. EXCHANGE VISITORS AND PARTICIPANT TRAINING (JUNE 2012)
		RAA6. VOLUNTARY POPULATION PLANNING ACTIVITIES – SUPPLEMENTAL REQUIREMENTS (JANUARY 2009)
		RAA7. PROTECTION OF THE INDIVIDUAL AS A RESEARCH SUBJECT (APRIL 1998)
		RAA8. CARE OF LABORATORY ANIMALS (MARCH 2004)
		RAA9. TITLE TO AND CARE OF PROPERTY (COOPERATING COUNTRY TITLE) (NOVEMBER 1985)
		RAA10. COST SHARING (MATCHING) (FEBRUARY 2012)
		RAA11. PROHIBITION OF ASSISTANCE TO DRUG TRAFFICKERS (JUNE 1999)
		RAA12. INVESTMENT PROMOTION (NOVEMBER 2003)
		RAA13. REPORTING HOST GOVERNMENT TAXES (DECEMBER 2014)

		RAA14. FOREIGN GOVERNMENT DELEGATIONS TO INTERNATIONAL CONFERENCES (JUNE 2012)
		RAA15. CONSCIENCE CLAUSE IMPLEMENTATION (ASSISTANCE) (FEBRUARY 2012)
		RAA16. CONDOMS (ASSISTANCE) (SEPTEMBER 2014)
		RAA17. PROHIBITION ON THE PROMOTION OR ADVOCACY OF THE LEGALIZATION OR PRACTICE OF PROSTITUTION OR SEX TRAFFICKING (ASSISTANCE) (SEPTEMBER 2014)
		RAA18. USAID DISABILITY POLICY - ASSISTANCE (DECEMBER 2004)
		RAA19. STANDARDS FOR ACCESSIBILITY FOR THE DISABLED IN USAID ASSISTANCE AWARDS INVOLVING CONSTRUCTION (SEPTEMBER 2004)
		RAA20. STATEMENT FOR IMPLEMENTERS OF ANTI-TRAFFICKING ACTIVITIES ON LACK OF SUPPORT FOR PROSTITUTION (JUNE 2012)
		RAA21. ELIGIBILITY OF SUBRECIPIENTS OF ANTI-TRAFFICKING FUNDS (JUNE 2012)
		RAA22. PROHIBITION ON THE USE OF ANTI-TRAFFICKING FUNDS TO PROMOTE, SUPPORT, OR ADVOCATE FOR THE LEGALIZATION OR PRACTICE OF PROSTITUTION (JUNE 2012)
		RAA23. UNIVERSAL IDENTIFIER AND SYSTEM FOR AWARD MANAGEMENT (NOVEMBER 2020)
		RAA24. REPORTING SUBAWARDS AND EXECUTIVE COMPENSATION (NOVEMBER 2020)
		RAA25. PATENT REPORTING PROCEDURES (NOVEMBER 2020)
		RAA26. ACCESS TO USAID FACILITIES AND USAID'S INFORMATION SYSTEMS (AUGUST 2013)
		RAA27. CONTRACT PROVISION FOR DBA INSURANCE UNDER RECIPIENT PROCUREMENTS (DECEMBER 2014)
		RAA28. AWARD TERM AND CONDITION FOR RECIPIENT INTEGRITY AND PERFORMANCE MATTERS (April 2016)
		RAA29. RESERVED
		RAA30. PROGRAM INCOME (AUGUST 2020)
		RAA31. NEVER CONTRACT WITH THE ENEMY (NOVEMBER 2020)

REQUIRED AS APPLICABLE STANDARD PROVISIONS FOR NON-U.S. NONGOVERNMENTAL ORGANIZATIONS

Required	Not Required	Standard Provision
TBD		RAA1. ADVANCE PAYMENT AND REFUNDS (NOVEMBER 2020)
		RAA2. REIMBURSEMENT PAYMENT AND REFUNDS (DECEMBER 2014)
TBD		RAA3. INDIRECT COSTS – NEGOTIATED INDIRECT COST RATE AGREEMENT (NICRA) (NOVEMBER 2020)
		RAA4. INDIRECT COSTS – CHARGED AS A FIXED AMOUNT (NONPROFIT) (JUNE 2012)
		RAA5. INDIRECT COSTS – DE MINIMIS RATE (NOVEMBER 2020)
		RAA6. UNIVERSAL IDENTIFIER AND SYSTEM OF AWARD MANAGEMENT (NOVEMBER 2020)
		RAA7. REPORTING SUBAWARDS AND EXECUTIVE COMPENSATION (NOVEMBER 2020)
		RAA8. SUBAWARDS (DECEMBER 2014)
		RAA9. TRAVEL AND INTERNATIONAL AIR TRANSPORTATION (DECEMBER 2014)
		RAA10. OCEAN SHIPMENT OF GOODS (JUNE 2012)
		RAA11. REPORTING HOST GOVERNMENT TAXES (JUNE 2012)
		RAA12. PATENT RIGHTS (JUNE 2012)
		RAA13. EXCHANGE VISITORS AND PARTICIPANT TRAINING (JUNE 2012)
		RAA14. INVESTMENT PROMOTION (NOVEMBER 2003)
		RAA 15. COST SHARE (JUNE 2012)
		RAA16. PROGRAM INCOME (AUGUST 2020)
		RAA17. FOREIGN GOVERNMENT DELEGATIONS TO INTERNATIONAL CONFERENCES (JUNE 2012)
		RAA18. STANDARDS FOR ACCESSIBILITY FOR THE DISABLED IN USAID ASSISTANCE AWARDS INVOLVING CONSTRUCTION (SEPTEMBER 2004)
		RAA19. PROTECTION OF HUMAN RESEARCH SUBJECTS (JUNE 2012)
		RAA20. STATEMENT FOR IMPLEMENTERS OF ANTI-TRAFFICKING ACTIVITIES ON LACK OF SUPPORT FOR PROSTITUTION (JUNE 2012)

		RAA21. ELIGIBILITY OF SUBRECIPIENTS OF ANTI-TRAFFICKING FUNDS (JUNE 2012)
		RAA22. PROHIBITION ON THE USE OF ANTI-TRAFFICKING FUNDS TO PROMOTE, SUPPORT, OR ADVOCATE FOR THE LEGALIZATION OR PRACTICE OF PROSTITUTION (JUNE 2012)
		RAA23. VOLUNTARY POPULATION PLANNING ACTIVITIES – SUPPLEMENTAL REQUIREMENTS (JANUARY 2009)
		RAA24. CONSCIENCE CLAUSE IMPLEMENTATION (ASSISTANCE) (FEBRUARY 2012)
		RAA25. CONDOMS (ASSISTANCE) (SEPTEMBER 2014)
		RAA26. PROHIBITION ON THE PROMOTION OR ADVOCACY OF THE LEGALIZATION OR PRACTICE OF PROSTITUTION OR SEX TRAFFICKING (ASSISTANCE) (SEPTEMBER 2014)
		RAA27. LIMITATION ON SUBAWARDS TO NON-LOCAL ENTITIES (JULY 2014)
		RAA28. CONTRACT PROVISION FOR DBA INSURANCE UNDER RECIPIENT PROCUREMENTS (DECEMBER 2014)
		RAA29. CONTRACT AWARD TERM AND CONDITION FOR RECIPIENT INTEGRITY AND PERFORMANCE MATTERS (April 2016)
		RAA30. RESERVED
		RAA31. NEVER CONTRACT WITH THE ENEMY (NOVEMBER 2020)

–END OF ANNEX 2 –

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ANNEX 3 - ABBREVIATIONS AND ACRONYMS

A&A	Acquisition and Assistance
ADS	Automated Directives System
AFFORD	Advancing Food Fortification Opportunities to Reinforce Diets
AMELP	Activity Monitoring, Evaluation, and Learning Plan
AO	Agreement Officer
AOR	Agreement Officer's Representative
BEO	Bureau Environmental Officer
BHA	Bureau for Humanitarian Assistance
CFS	UN Committee on World Food Security
CLA	Collaborating, learning, and adapting
DEC	Development Experience Clearinghouse
DDL	Data Development Library
DEIA	Diversity, equity, inclusion, and accessibility
DIS	Development Information Solution
EA	Environmental Assessment
ELAINE	Enhancing Local Achievements in Nutrition Excellence
ER	Environmental Review
ER4	Early recovery, risk reduction, and resilience
ERF	Environmental Review Form
FAA	Foreign Assistance Act
FTF	Feed the Future Initiative
GFSS	Global Food Security Strategy
GH	Bureau for Global Health
GNCP	US Government Global Nutrition Coordination Plan
IEE	Initial Environmental Examination
IR	Intermediate Result
LSFF	Large-scale food fortification
MCGL	MOMENTUM Country and Global Leadership
MEL	Monitoring, evaluation, and learning
MIHR	MOMENTUM Integrated Health Resilience
MTDC	Modified total direct costs
NCD	Non-communicable disease
NICRA	Negotiated indirect cost rate agreement
NOFO	Notice of funding opportunity
OFAC	Office of Foreign Assets Control
RCE	Request for Categorical Exclusion
RFS	Bureau for Resilience and Food Security
SAM	System for Award Management
SBC	Social and behavior change
SC	Selection committee
UEI	Unique award identifier

USAID	United States Agency for International Development
WASH	Water, sanitation, and hygiene

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ANNEX 4: GENDER ANALYSIS

Gender is an essential cross-cutting issue in the field of monitoring, evaluation and research. Recognition of the importance of gender effects on health is driving a global policy push for addressing gender within health programs and policies. As described in the USAID Gender Policy, USAID investments are aimed at achieving three overarching outcomes:

1. Reduce gender disparities in access to, control over, and benefit from resources, wealth, opportunities, and services;
2. Reduce gender-based violence (GBV) and mitigate its harmful effects on individuals;
3. Increase the capability of women and girls to realize their rights, determine their life outcomes, and influence decision-making.

GH PEARL would be able to support all three outcomes as they relate to global health. It will have the technical capacity to serve as a leader in the gender M&E field by developing high-quality, actionable evidence to evaluate program effectiveness, research to identify and overcome barriers to program implementation, and a strengthened culture of data demand and use to guide decision making in policies and programs for USAID's partners. It will work to improve data quality, analysis, visualization and interpretation, ensuring that gender considerations become integral to existing and newly created country and global M&E systems and that frameworks, indicators, and analytic tools for sex-disaggregated data are made available for health program and policy decision-making. This work will support efforts to raise awareness of gender equity imbalances and advocacy for innovative and high-quality interventions that strengthen country health systems.

Illustrative activities may include ensuring that sufficient high-quality data are available to assess the gender and health outcomes of programs and guide decision making at all levels by developing, validating, and testing M&E tools (including potentially indicators and tools for gender-sensitive measures such as empowerment and agency in decision-making about health); supporting the collection and use of high quality, sex-disaggregated data to help reduce gender disparities; or implementing research and evaluation to explore and document the reasons for gender inequities or GBV and develop recommendations to ensure that policy makers have access to this evidence.

GH PEARL will provide equitable access to training and capacity building opportunities to men and women. It will promote improved monitoring and evaluation and apply a gender lens across health sectors to enable all parties to consider and allow for the needs, realities, participation, and "voice" of women and men, boys and girls, and gender and sexual minorities.

The USAID AOR and GH PEARL management team will collaborate with USAID Gender Champions and Global Health Gender Advisors to further incorporate gender equality and women's empowerment into this activity.

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