

# **Environmental Policy and Institutional Governance IQC II (EPIQ II)**

## **User's Manual**

**AUGUST 6, 2006**

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# **I. AN INTRODUCTION TO THE ENVIRONMENTAL POLICY IQC II (EPIQ II)**

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## **What is EPIQ II?**

The Environmental Policy and Institutional Governance Indefinite Quantity Contract II (EPIQ II) enables USAID missions, bureaus, and the Department of State to rapidly access top-notch technical expertise in three outstanding consortia that support policy reform and institutional governance, improvements in environmental quality, and sustainable natural resource use. EPIQ II has a contract ceiling of \$250 million and is effective from October 1, 2003 through September 30, 2008. Prime contractors of the three EPIQ consortia are Chemonics International Inc., International Resources Group, and PA Government Services Inc. Projects funded through EPIQ can deal with a wide variety of environmental and natural resource related policy formation and institutional governance activities at the national and local level—and with any related technical assistance, training, research, or other initiative that improves a host country's ability to support economic growth, participate in international agreements, and strengthen public-private sector partnerships. Each firm is able to compete on every task order for the duration of EPIQ II. Task orders are either Cost-Plus-Fixed-Fee or Firm-Fixed-Price – explicitly designed to minimize operational costs and increase performance standards—and can extend up to one year beyond the IQC closing date.

## **How can I use it?**

EPIQ II has been designed to develop and implement policy and institutional governance programs to enhance environmental quality, strengthen natural resource management, and promote sustainable and equitable economic development in a wide variety of development settings. The IQC includes the top policy reform and environmental organizations in the world and can be used to support work within and among the following technical areas: (1) Linking Environment and Economic Growth; (2) Environmental Policy Support; (3) Multilateral Environmental Agreements; (4) Global Climate Change; (5) Public-Private Partnerships; and (6) Institutional Development and Strengthening.

## **Can it help me develop a strategy and prepare a task order?**

EPIQ II can assist missions to prepare the background materials for a Scope of Work and other documents through a unique funding mechanism – a Technical Assistance Services (TAS) Task Order that has already been awarded to the three EPIQ contractor consortia. The TAS allows rapid technical support services to missions, including diagnostics and analysis in advance of an RFP. Model scopes of work and position descriptions are also available for a variety of activities. This is ideal for missions who may lack the full set of knowledge, resources, and access to personnel to lay the groundwork for a potential project. In all cases, the mission CTO will retain complete control of the task order during development and after award.

## **What expertise can I tap through EPIQ?**

EPIQ features a core group of 15 senior technical professionals seasoned in USAID work. And there are hundreds more available through the three consortia, many already stationed in USAID countries. All three IQC contractors are leaders in policy reform, institutional governance, and management of environmental issues and have a rich history of bringing USAID projects to fruition in a successful and sustainable manner. Each contractor brings with it a core group of outstanding subcontractors with wide and varying experience.

## II. HOW DO I CONTACT THE USAID/W CTO OR CO?

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For information on USAID's EPIQ II contact either the CTO or CO in AIDW. The Cognizant Technical Officer (CTO) is Kenneth Baum. The Contract Officer (CO) is Charity Benson (M/OP). Any questions or requests for clarification may be addressed to them:

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### III. EPIQ II SCOPE OF WORK AND SUBJECT MATTER AREAS

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#### A. Policy Reform Support

*Goals:*

- ♦ To promote improved and effective environmentally related management at the local, national, transboundary, and multilateral levels by means of more effective policy reform and institutional governance programs;
- ♦ To strengthen the capability of host country governments and non-governmental organizations to identify and analyze environmentally related policy priorities and strategies, engage in policy dialogue, design appropriate policy interventions, and effectively implement these activities by evaluating monitoring and evaluating program performance and making changes as needed; and
- ♦ To encourage broad participation in policy program activities by stakeholders, the public and private sectors, NGOs, and PVOs. It is important to note that a significant proportion of the bilateral work envisioned under this contract will be collaborative with local or national NGOs, community-based organizations (CBOs) and the private sector in partnership with appropriate host-country government organizations.

(a) *Priority Setting and Strategic Planning*

**Goal:** Assistance in strategic planning for environmentally related policy and institutional governance activities may include, but not be limited to, activities such as the following:

- (1) Assisting USAID and its partners to more effectively plan and develop environmentally related policy and institutional governance programs;
- (2) Assisting USAID missions and partners to plan strategically, including the development of goals, priorities, objectives, results frameworks, and work plans;
- (3) Engaging the participation of relevant stakeholders in planning initiatives, including the private sector, with special attention to participation by traditionally under-represented groups, such as women and indigenous people; and
- (4) Conducting initial environmental examinations (IIE), environmental assessments (EA), or environmental impact analyses (EIA).

**(b) *Policy Analysis Support***

**Goal:** This contract is a tool that will help USAID support effective and appropriate environmentally related policies and improve understanding and formulation of policy analysis.

Assistance in supporting effective and appropriate policies and understanding the policy analysis process may include, but not be limited to, the following illustrative types of program assessment activities:

- (1) Issue Recognition: Identifying and analyzing policy constraints and opportunities;
- (2) Issue Diagnosis: Analyzing the economic, social, ecological and institutional aspects of alternative policies; and
- (3) Issue Design: Analysis of alternative intervention strategies, approaches, and incentives or dis-incentives to change behavior.

**(c) *Policy Dialogue Support***

**Goal:** This contract is a tool that will help USAID support effective and appropriate environmentally related policies through policy dialogue.

Assistance in supporting effective and appropriate environmental policy dialogue actions may include, but not be limited to, the following illustrative types of activities:

- (1) Analysis and evaluation of socio-economic and cultural benefits and costs of alternative policy interventions;
- (2) Promoting broad discussion and participation, and building political and stakeholder consensus around the most promising policy activities and interventions; and
- (3) Evaluating, prioritizing, and choosing among alternative policy choices for a “best” policy action.

**(d) *Policy Implementation Support***

**Goal:** This contract is a tool that will help USAID and cooperating country partner institutions effectively implement appropriate and mutually agreed upon environmentally related policy goals and objectives.

Assistance in supporting policy implementation may include, but not be limited to, the following illustrative types of activities:

- (1) Providing technical assistance for development of policy implementation legislation and decrees;

- (2) Providing technical assistance to assist in the codification of administrative law;
- (3) Providing technical assistance to assist in redefining, clarifying, and formalizing changes in institutional roles and responsibilities within and between the public and private sectors;
- (4) Providing the appropriate technical assistance for building the institutional governance capacity for policy analysis, dialogue, implementation, and evaluation; and
- (5) Including participation of concerned stakeholders in policy implementation.

**(e) *Policy Performance Monitoring and Evaluation***

**Goal:** This contract will assist USAID and cooperating country partner institutions to monitor and evaluate the performance of environmentally related policy reforms and to make timely adjustments as appropriate.

Assistance in supporting policy performance monitoring and evaluation may include, but not be limited to, the following illustrative types of activities:

- (1) Assisting USAID and partners to design and implement policy program monitoring and evaluation activities, both to promote adaptive management and to document results of USAID-supported activities with appropriate indicators;
- (2) Analyzing lessons learned to identify best known practices in monitoring and evaluation and providing this information to USAID and partners;
- (3) Evaluating policy and institutional governance programs and approaches for effectiveness and to determine best practices; and
- (4) Including participation of concerned stakeholders in policy and institutional performance monitoring and evaluations.

**(f) *Dissemination of Environmentally Related Policy Knowledge and Research***

**Goals:** This contract is a tool that will help USAID:

- (1) Analyze key policy issues which can represent important constraints to sustainable development;
- (2) Encourage a greater awareness and appreciation for the importance of improved and appropriate policies; and
- (3) Promote broad participation in the policy process.

The primary audiences for dissemination will be the Agency, especially its operating units overseas and in the regional bureaus, other donors, and counterpart institutions in USAID-assisted countries. A range of information dissemination vehicles, including but not limited to, publications, seminars, workshops and the internet will be considered.

**(g) *Conducting Selected Basic and Applied Environmentally Related Policy Research***

Assistance in research may include, but will not be limited to, the following illustrative types of activities:

- (1) Research on appropriate policies in specific sites and across socioeconomic regions;
- (2) Research on the socio-economic context for policies, including, but not limited to, the economic valuation of ecological services, financing mechanisms, and legal structures; and
- (3) Research on cultural aspects of policies, including indigenous land use systems, property rights, local knowledge and natural resource use, and spiritual or cultural incentives.

**(h) *Environmentally Related Environmentally Related Policy Communications and Outreach***

Assistance in communicating and disseminating results may include, but not be limited to, the following illustrative types of activities:

- (1) Synthesizing best practices and effective approaches into “lessons learned” for the development of more effective and appropriate policy programs and activities;
- (2) Developing appropriate policy education and awareness communication package(s), and strategically disseminating program and/or analytical information;
- (3) Assisting USAID and partners to present policy lessons and results in effective manner, including the use of maps, the internet, other electronic media, and brochures; and
- (4) Strengthening the governance capacity of local governmental and non-governmental organizations to develop appropriate environmental policy education and awareness communication and outreach programs.

## **B. Multilateral Environmental Agreements**

**Goals:** USAID has long recognized that certain environmentally related issues are regional or multilateral in nature and pose profound threats to sustainable development

worldwide—potentially impacting economic growth, urban areas, coastal development, agriculture and food security, forestry and biodiversity and health. Developing countries are predicted to be most affected by the detrimental impacts of many of these issues, although more developed countries may also be highly affected. Through this contract, USAID seeks to obtain technical assistance and expertise to meet the following objectives:

- (a) To assist developing countries meet their obligations under various Multilateral Environmental Agreements and Framework Conventions, and to support related activities including vulnerability assessments and national action plans. For example, providing advice relating to international treaties and agreements related to biodiversity conservation and sustainable forest management, including but not limited to the Convention on International Trade in Endangered Species of Wild Fauna and Flora (CITES), the Convention on Biological Diversity, the RAMSAR convention, the Intergovernmental Forestry Forum and the International Tropical Timber Agreement;
- (b) To analyze, design, and assist in the implementation of “win-win” opportunities through programs which support both sustainable development and environmental issue mitigation or remediation;
- (c) To understand and recognize the costs and benefits of USAID and/or DOS programs, and to develop a systematic method of describing and tracking contributions of USAID and/or DOS programs; and
- (d) To ensure that international policy supports USAID’s and the USG foreign policy objectives.

## **C. Global Climate Change**

**Goals:** USAID has long recognized that global warming poses a tremendous threat to ecological balance and economic development worldwide, particularly for developing countries and countries with economies in transition. Since 1990, efforts to address the causes and impacts of climate change have been a key focus of USAID’s development assistance program. In 1998, USAID initiated the Climate Change Initiative, an effort that involves 50 country and regional programs worldwide, promoting sustainable development that minimizes the associated growth in greenhouse gas emissions and reduces vulnerability to climate change impacts. Through this contract, USAID seeks to obtain technical assistance and expertise to meet the following objectives:

- (a) Reducing net greenhouse gas emissions from the energy sector, industries and urban areas. In most economies, an energy sector is the engine for development. The Climate Change Initiative seeks to work in the energy, industrial and urban sectors to reduce greenhouse gas emissions, while also reducing pollution and conserving energy. Such efforts are focused on policy advances to promote energy efficiency, renewable energy, and clean energy production, as well as governance capacity building and technology transfer activities.

- (b) Strengthening participation in the goals of the United Nations Framework Convention on Climate Change (UNFCCC); advancing a global solution to climate change requires participation by all Parties to the UNFCCC. USAID seeks to increase developing and transition country participation in the UNFCCC through targeted policy reform and institutional governance capacity building activities. Such activities focus on area such as: integrating climate change into national development strategies; establishing emissions inventories; developing national climate change action plans; promoting procedures for receiving, evaluating and approving greenhouse gas mitigation project proposals; and modeling activities.
- (c) Reducing vulnerability to the threats posed by climate change; through institutional governance capacity building activities and disaster relief projects, USAID supports a large number of projects that help developing countries respond to climate change impacts across a range of sectors, including agriculture, water resources, health and forestry.

**NOTE: U.S. Government funds will “NOT” be used under this contract to support the Kyoto Protocol.**

#### **D. Public-Private Partnerships**

**Goals:** Improved environment quality and natural resource management in many countries often involves targeted sector (i.e., energy, solid waste, potable water, parks, tourism, etc.) structural and policy (legal and regulatory) reforms involving public-private partnerships in order to enhance sustainable broad based economic development. Sometimes, these activities are referred to as “sector restructuring or privatization.” In large part, fostering public-private partnerships will depend on formal and informal changes in roles, responsibilities, and relationships between the public and private sectors. These changes in “roles” will enhance the likelihood that instead of being viewed as competitive antagonists, the public and private sectors become willing participants and collaborative partners by working together to define equitable policies and responsible compromises.

Assistance may include, but will not be limited to, the following illustrative types of activities:

- (a) Evaluating and analyzing policy, legal, regulatory, and institutional frameworks to determine obstacles to strong public and private sector partnerships and increased investment in improved environmental and natural resource management, privatization, decentralization, and adoption of “best practices;”
- (b) Designing and implementing appropriate policy, legal, and regulatory frameworks to overcome obstacles to strong public and private sector commitment to and investment in improved environmental management, privatization, decentralization, and adoption of “best practices;” and
- (c) Analyzing, designing, and implementing appropriate financing approaches and incentives to enhance public-private partnerships which will encourage increased

private sector investment in improved environmental management, decentralization, and adoption of “best practices.”

## **E. Institutional Governance**

**Goals:** In terms of institutional development, this Indefinite Quantity Contract is a tool that will help USAID:

- ♦ strengthen the capability of key government, non-government, community and people’s organizations, and other institutions, as appropriate, to support environmentally related policy activities;
- ♦ develop and apply monitoring and evaluation techniques and approaches; and
- ♦ Promote the sustained financing of institutions with environmentally related policy responsibilities.

It is important to note that much of the bilateral work envisioned under this contract will be with local or national NGOs, community-based organizations (PVOs) and the private sector in partnership with appropriate host-country government organizations.

### **(a) *Human Resources Development***

Assistance in supporting human resource development may include, but not be limited to, the following illustrative types of activities:

- (1) Evaluating overall human resource development needs, and advising on governance capacity building actions (appropriate combinations of in-country training, international training, field-based training, classroom training, assignment of expatriate advisors, etc.);
- (2) Arranging for the training of individuals, both in formal and non-formal programs, including post-training evaluations in order to support continuing skills development of participants and to identify and adopt lessons learned; and,
- (3) Developing and providing short courses related to environmental policy, environmental economics, sector restructuring, privatization, public-private partnerships, monitoring, enforcement, regulation, sustainable tourism, and other programmatic areas referenced in other parts of this Scope of Work.

### **(b) *Sustained Financing/Grant Making Capacity***

Assistance in supporting the sustained financing and/or grant making capacity of NGOs, PVOs, and host government organizations may include, but not be limited to, the following illustrative types of activities:

- (1) Advising on financial planning and management (including cost-recovery) and assisting with the development of financial/business plans;

- (2) Advising on grant making and other operations; and
- (3) Advising on fundraising strategies and endowment establishment and management.

(c) ***Institutional Governance***

Assistance in strengthening institutional capability may include, but not be limited to, the following illustrative types of activities:

- (1) Assessing institutional governance needs (and opportunities for meeting them) of key government, non-government, community and other organizations concerned with environmental policy;
- (2) Developing effective management authorities and institutional arrangements for environmental policy;
- (3) Advising on the development of organizational structures, personnel systems, financial management systems, etc., for NGOs, government organizations, and environmentally friendly enterprises;
- (4) Strengthening the capacity of local governmental and non-governmental organizations to establish clear messages and effective communication channels; and
- (5) Carrying out and evaluating impacts of efforts to strengthen institutions concerned with environmental policy and related areas.

**F. Linking Environment and Economic Growth**

**Goals:** In the neoclassical economic growth paradigm, growth (G) was defined to be a function of capital (K) and labor (L). In the mid-1950s, technology (T) was recognized as a separate input, and the paradigm became represented as  $G = f(K, L, T)$ . For several decades, economists and development professionals have been taking advantage of this flexible model to devise more sophisticated and realistic policy approaches for allocating donor and international finance institutions' resources. As a result, the growth and development literature is replete with studies making differing assumptions and then describing growth paths with alternative levels, allocations, and quality of capital, labor, and technology.

In the late 1960's, awareness of environment as a determining factor affecting growth became more widely appreciated. In the late 1970's, development economists began seriously rethinking the neoclassical growth model because of the realization that macroeconomic policy recommendations would be incomplete without reference to environmental policy components. As a consequence, the analytical paradigm was redefined in the late 1980s to reflect environmentally sustainable economic growth. Sustainable economic growth is now portrayed as depending on the level, quality, and management of renewable and non-renewable natural resources (R), environmental quality (E), and institutional governance capacity (I). Environmental quality is

dependent, in turn, on the level and growth of pollution or waste streams, and the natural assimilation of pollution by the environment (as environmental services) or through clean up expenditures. Thus, the new economic growth paradigm would be presented as  $G = f(K, L, T, R, E, \text{ and } I)$ , where economic growth is not only a function of human and manufactured capital, labor, and technology, but is also a function of the stock of natural resources, environmental quality, and institutional governance.

Through this contract, USAID seeks to obtain technical assistance and expertise to meet the following objectives:

- (a) Analyzing, assessing, and evaluating environmental impacts of transboundary, national, or local economic development projects and programs (e.g., infrastructure or natural resource extraction), and then to propose mitigation measures or options.
- (b) Supporting development of legal, regulatory, and /or administrative policy measures, including incentives, to provide a framework for sustainable development;
- (c) Developing institutional and legal arrangements for environmental impact assessment including mitigation and monitoring of economic development projects.
- (d) Understanding and recognizing the socio-economic and environmental costs, benefits, and tradeoffs of economic development projects and infrastructure development, and to develop systematic policy approaches for tracking and describing these costs, benefits, and tradeoffs, and mitigating adverse environment impacts.
- (e) To ensure that linkages between environment and economic growth support USAID's, DOS', and the USG foreign policy objectives relating to enhanced economic growth and foreign development assistance.

## IV. IMPORTANT EPIQ II CONTRACT PROVISIONS

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EPIQ II has three (3) separate contracts, each with a different prime and associated set of subcontractors. Each Prime's contract shares the same Statement of Work (SOW) and contract provisions. Task Orders (TOs) may be written to extend throughout the life of the IQC—September 30, 2009. A TO must be awarded prior to the expiration date of the basic contract—September 30, 2008. The cumulative value of activities under all three (3) contracts cannot exceed \$250 million.

Missions and regional bureaus will contract directly for services under EPIQ II. However, they should consult with the EPIQ II CTO or co-CTO when developing a SOW. The draft SOW must be sent to the EPIQ II CTO for review and clearance prior to submitting the RFP to the contractors for proposal responses. All TOs should be directly processed and negotiated by the respective Bureau or Mission CO. Copies of all TO reports and deliverables must be sent to the AID/W EPIQ II CTO or co-CTO.

### **A. Type of Contract: A TO may be either a Cost-Plus-Fixed-Fee (CPFF) or Firm-Fixed-Price (FFP) type.**

#### **(1) *Cost-Plus-Fixed-Fee (CPFF)***

CPFF Task Orders will include a "Total Estimated Cost-Plus-Fixed-Fee" (TECPFF) budget which provides the ceiling for the total amount of the Task Order. Each CPFF Task Order will contain a negotiated mix of the professional labor (level of effort) for the prime contractor and subcontractor(s), daily rate, the estimated number of workdays, other direct costs, indirect costs, and fixed fee.

#### **(2) *Firm-Fixed-Price (FFP)***

FFP Task Orders will include a "Firm-Fixed-Price" which shall reflect a negotiated mix of the professional labor for the prime contractor and subcontractors, daily rates, and estimated number of workdays. The contractor shall not be paid in excess of the negotiated price for activities included in the task order.

### **B. Payment of Fixed Fee:—(Applicable only to CPFF Task Orders)**

#### **(1) *Payment Rate***

For each Cost-Plus-Fixed-Fee (CPFF) Task Order, the contractor will be paid up to 85% of the negotiated fixed fee. The remaining 15% will be held in reserve until the submission and approval of a final TO voucher. If, in the opinion of the CO, payment of the fixed fee would result in a percentage of fee that is in excess of the percentage of work completed, further payment of the fee may be suspended until the Contractor has made sufficient progress to justify further payment of the fee.

(2) ***Fixed Fee***

A fixed fee percentage will be negotiated for each TO. The elements of each Task Order shall be negotiated between the CO and contractor, arriving at a total estimated cost. The fixed fee will be added to the total estimated cost to establish a Total Estimated Cost plus Fixed Fee (TECPFF) budget for the task order.

**C. Role of the EPIQ II CTO**

The EPIQ II CTO will coordinate all USAID/W administrative activities required for the overall EPIQ II contract – including keeping copies of the EPIQ II contracts and subsequent modifications, tracking the selection of TO awardees, and overall expenditures against the EPIQ II overall ceiling. The EPIQ II CTO will coordinate and/or provide technical assistance to Missions and Bureaus on EPIQ II related activities as requested by the originating Mission or Bureau.

**D. Role of Task Order CTO**

Each individual TO will have a designated Task Order CTO who will be responsible for technical day-to-day supervision and management of the TO. The CTO (or awardee) will forward any appropriate information and reports to the EPIQ II CTO as specified in the TO.

**E. Performance-Based Contracting**

Within any task order, EPIQ II can accommodate either performance-based or level-of-effort requirements, or a combination of the two. Whenever feasible, performance-based elements are encouraged for task order SOWs. ***COs and CTOs should utilize Performance-Based Contracting (PBC) methods to the maximum extent possible when acquiring services under this contract.*** “Performance-based contracting” is defined as an approach that involves structuring all aspects of an acquisition contract around the purpose of the work to be performed. EPIQ II encourages development of “milestones” for use in work plans for validating deliverables and services performed when reimbursements for costs incurred are claimed during the vouchering process. The CO and CTO are also strongly encouraged to request that vouchers be prepared that separate expenses into well defined activities, and then compared to milestones, in order to track performance progress.

**F. Funding of Task Orders**

FFP TOs issued under this contract shall be fully funded at time of award. CPEFF TOs may be fully funded or incrementally funded.

**G. Grants**

Funds may be made available for the award of grants. The contractor shall negotiate, award and administer sub-agreements. These grants will be secondary or minor to the overall work performed under the TO. Funds for sub-grantees will be provided on a pass-through basis, and profit/fee will not be applied to such funds.

***Accordingly:***

- (1) USAID will have substantial involvement in establishing the selection criteria and in selecting the grant recipients, including, at a minimum, USAID approval of the selection of grantees prior to award;
- (2) USAID will retain the ability to terminate the grant activities unilaterally in extraordinary circumstances;
- (3) Relevant requirements which apply to USAID-executed grants will also apply to grants signed by the contractor in this small grants program; the contractor shall have the responsibility to determine that applicable requirements are included in each grant; and
- (4) The contractor shall award such grants only to non-U.S., non-governmental grantees in an amount up to \$100,000 per grant.

**[Note: A waiver is required by the Procurement Executive, in accordance with ADS 302 (formally CIB 94-23), for the execution and administration of grants for each Task Order issued under this contract.]**

## **H. Commodity Procurement**

The Geographic Code for this contract is: (000) United States. This code is subject to change by the CTO, depending on the nature of the Task Order and type(s) of funds utilized.

As part of this contract, the contractor may be required to purchase commodities. The procurement of commodities should be *relatively small* with respect to the overall Task Order, and may include:

- (1) Assessing, analyzing, and developing specifications for commodities required by public and private organizations working with USAID assistance; and
- (2) Undertaking the procurement of approved commodities for USAID partners according to USAID regulations. This could include computer and office equipment, field and training tools, and other commodities, supplies, and equipment required for assistance.

## **I. Environmental Compliance**

The Agency requires that before funds are obligated under this IQC, a determination must be made regarding the need for an Initial Environmental Examination (IEE). If an IEE is required, it should be completed by the CTO **before** the TO selection process is initiated.

It is anticipated that most of the work funded under EPIQ II IQC will come under one of the following categorical exclusions to the requirement for an IEE statement:

- ♦ education, technical assistance, or training programs;

- ♦ controlled experimentation exclusively for the purpose of research and field evaluation;
- ♦ analyses, studies, academic or research workshops and meetings;
- ♦ document and information transfers; and
- ♦ Studies, projects, or programs intended to develop capability in recipient countries to engage in development planning.

**J. Organizational Conflict of Interest (OCI)**

Contract Information Bulletin (CIB) 99-17 dated August 17, 1999 entitled “Organizational Conflict of Interest” sets forth the Agency’s policy and interpretations concerning the application of FAR, subpart 9.5 when an organization under contract with USAID performs design, evaluation, or audit work.

## V. WHAT IS THE SELECTION PROCESS FOR AWARDING TASK ORDERS?

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The CTO, with the concurrence of the CO will determine which selection factors are appropriate. The CTO and CO must receive USAID/W CTO concurrence prior to the selection process. The Task Order CTO must provide the following to the USAID/W CTO for concurrence:

- (1) A copy of the Statement of Work (SOW);
- (2) The proposed ceiling price;
- (3) The proposed selection criteria; and
- (4) The proposed Task Order type (CPFF or FFP).

**NOTE: Ordinarily, the USAID/W CTO will not be involved in the selection process for Bureau or Mission-initiated Task Orders (outside of his/her normal responsibilities), unless specifically requested by the Bureau or Mission and agreed to by the USAID/W CTO.**

### A. Selection Factors (See Section V(E) – pg. 13 for Threshold Levels)

- (1) At a minimum, the CO and CTO will evaluate the following factors on all task orders:
  - (a) *Past Performance Information:*

Past performance may include reference checks, Contractor Performance Reports (CPRs), and/or relevant past performance information on-hand or additional past performance information submitted by the contractor.
  - (b) *Cost/Price Information:*

Cost proposals requested by the Contracting Officer may be for Cost-Plus-Fixed-Fee (CPFF) or Firm-Fixed-Price (FFP) Task Orders.

### B. Optional Selection Criteria

In addition to the above minimum criteria, the CTO/CO may select any of the following additional evaluation criteria, or other factors that the CO or CTO believes are relevant to the award of a specific Task Order (See FAR 16.505). If optional criteria are selected as factors for evaluation of a specific task order, the CO shall notify all awardees of such criteria when the request for Task Order proposal is made public.

- (1) ***Technical approach*** is the contractor's description of how it intends to carry out the proposed activity, including roles and responsibilities of personnel, home office and in-country support, coordination and strengthening of local

organizations, logistical and political considerations, timelines and milestones for deliverables, and any other factor that may affect the outcome.

- (2) ***Quality and Availability of Personnel*** is the quality and availability of the contractor's personnel, including resumes and availability information; and
- (3) ***Monitoring and Evaluation Plan***

In addition to the Technical Proposal, the contractor may be required to submit a Monitoring and Evaluation Plan that refers to technical requirements in the contract relating to:

- (i) Deliverables, outputs, and/or results to be achieved;
  - (ii) Milestone Schedule with delivery dates for service or product, and results (as specified in the TO);
  - (iii) Evaluation methods or techniques (qualitative or quantitative) for quality assurance; and/or
  - (iv) Other information associated with performance monitoring and evaluation, as specified in individual TOs.
- (4) Other relevant criteria determined jointly by the CO and CTO.

### **C. Fair Opportunity**

Throughout the selection process, the Task Order CTO and CO are required to give each contractor a fair opportunity to receive an award. All IQC awardees must be notified of each requirement and be provided a copy of the Statement of Work. Accordingly, each contractor shall be given a fair opportunity to submit a proposal/ response, and all proposals received must therefore be evaluated. (See FAR 16.505 "Fair Opportunity")

### **D. Request for Task Order Proposal and Thresholds**

The following are the thresholds and corresponding procedures for requesting task order Proposals and were jointly agreed upon by the Professional Services Council (PSC) and OP/W.

- (1) **For task orders estimated to be equal to or less than US\$100,000:** The CO will request a task order proposal from each contractor. The CO may not ask for more than a two (2) page cost proposal, and if the CTO deems it necessary, may also ask for a technical proposal of no more than three (3) pages (page limit does not include resumes, graphs, or past performance information). After applying the evaluation criteria stated in the request, the CTO shall draft a brief evaluation memorandum to the CO recommending that the task order be awarded to the contractor that most successfully addresses the evaluation criteria. The CO is responsible for final selection, negotiation, and task order award.

- (2) **For task orders estimated to be more than US\$100,000 and equal to or less than US\$2,000,000:** The CO will request a task order proposal from each contractor. The CO may not ask for more than a two (2) page cost proposal from each Contractor, and if the CO, with the concurrence of the CTO, deems it necessary, may also ask for past performance information, or for a technical proposal of no more than ten pages (page limit does not include resumes, graphs, and past performance information). After applying the evaluation criteria stated in the request, the CTO shall draft an evaluation memorandum to the CO recommending that the task order be awarded to the contractor that most successfully addresses the evaluation criteria. Once the Contractor is selected, the CO may ask for a more detailed proposal (technical or cost) if needed. The CO is responsible for final selection, negotiation, and task order award.
- (3) **For task orders estimated to be more than US\$2,000,000:** The CO will request a task order proposal from each contractor, or the CO may use the simplified procedure above in (2). The CO has discretion to decide how much documentation above the minimum set forth above in (2) is needed to assess the technical capability and cost of each Contractor. After applying the evaluation criteria stated in the request, the CTO shall draft an evaluation memorandum to the CO recommending that the task order be awarded to the contractor that most successfully addresses the evaluation criteria. Once the Contractor is selected, the CO may ask for a more detailed proposal (technical or cost) if needed. The CO is responsible for final selection, negotiation, and task order award.

All Contractors interested in being considered for any task order must submit a proposal in accordance with the CO's request for task order proposal instructions. The information that the CO requests from each Contractor must be the minimum needed.

#### **E. Cost/Business Management Proposal for Task Orders (Required)**

Cost proposals for Firm-Fixed-Price (FFP) and Cost-Plus-Fixed-Fee (CPFF) Task Orders will be negotiated based on a written cost proposal from the contractor, which may contain (at a minimum) the following information, as required by the CO:

- (1) **Labor** – Proposed personnel, labor categories, proposed salaries and effort.
- (2) **Other Direct Costs** – A complete breakdown of costs is required as directed by the CO.
- (3) **Subcontractor Costs** – A complete breakdown of subcontractor costs is required (i.e., labor, ODCs, indirect cost, and fee).
- (4) **Indirect Costs** – Proposed indirect costs for the prime contractor, including fringe benefits, overhead, G&A and M&H (if applicable), in accordance with the contractor's Negotiated Indirect Cost Rate Agreement (NICRA) must be submitted. If no NICRA exists, documentation will be required to support indirect costs, such as audited financial statements.
- (5) **Fixed Fee** – The Fixed Fee will be negotiated in each Task Order by the CO.

(6) ***Required Certifications and Other Information***

- (a) The contractor shall submit a Contractor Employee Biographical Data Sheet (USAID Form 1420-17) to support salary information. The form must be signed by the individual and the contractor (or subcontractor) in the appropriate spaces with all blocks completed, as appropriate;
- (b) A certification that the proposed personnel were not suggested or requested by USAID;
- (c) A Certificate of Current Cost and Pricing Data is required, pursuant to FAR 15.406-2, for Task Orders in excess of \$500,000 if there is “not” adequate price competition (at least two offers); and
- (d) A Small Business Subcontracting Plan shall be submitted by each Contractor for each Task Order proposal which exceeds \$500,000.

**F. Awardee is selected based on either:**

- (1) ***Lowest Price, Technically Acceptable or***
- (2) ***Tradeoff Process.***

The Task Order CO will retain final authority over the selection decision. The CO shall determine the appropriate method in achieving “**Best Value**” for the U.S. Government.

The CTO will conduct an evaluation of the technical criteria and prepare a selection memorandum. The CTO will submit the memorandum to the CO with a recommendation for award.

The CO will review the technical memo and may review the technical proposals, if requested. The CO will also evaluate cost factors, and execute the award.

As part of the cost evaluation, the CO will negotiate a final price for the TO together with any relevant terms and conditions applicable. If requested by the CO, the contractor shall submit a revised proposal (technical and/or cost/price) which reflects the results of these negotiations.

**G. Fair Opportunity Exceptions**

All Contractors will be given a fair opportunity to be considered for task orders over \$2,500, unless the Contracting Officer determines that one of the following exceptions applies:

- (a) An urgent need exists, and seeking competition would result in unacceptable delays,
- (b) Only one Contractor is capable at the level of quality required (e.g., predominant capability) because the requirement is unique or highly specialized,

- (c) The order must be issued on a sole source basis in the interest of economy and efficiency because it is a logical follow-on to an order already issued under the contract, provided that all awardees were given a fair opportunity to be considered for the original order. For a follow-on task order that implements an activity designed under another order under this contract, this exception may only be used if the CO complied with the OCI limitations in Contract Information Bulletin 99-17 “Organizational Conflicts of Interest.”

## **H. Classified Task Orders**

USAID may award a classified task order under this contract. Because USAID participates in the National Industrial Security Program (see FAR 4.4 and ADS 567), the CTO and CO must follow the procedures in ADS 567, particularly the requirement to include security specifications in the Statement of Work for a contract or task order.. Any contractor under this multiple-award EPIQ II IQC that has not been granted either an interim or final Secret level facility clearance by the Defense Security Service (DSS) may be determined to be ineligible to be considered for a classified task order. If time permits, the CO may allow a contractor without the requisite facility clearance to participate in the fair opportunity procedures for a classified task order in anticipation of DSS granting the clearance before the task order must actually be awarded. However, doing so is on the condition that all parties acknowledge and agree that if DSS does not grant an interim or final facility clearance in time that CO must award the classified task order to the contractor that is selected through the fair opportunity procedures AND has the requisite facility clearance.

## **VI. HOW SHOULD A STATEMENT OF WORK (SOW) PACKAGE BE PREPARED?**

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To the extent possible, a SOW Package should be prepared using performance-based elements and must be submitted to the USAID/W CTO for clearance. The USAID/W CTO can provide assistance to ensure that the SOWs and evaluation criteria are properly designed. In addition, the SOW should also contain a listing of personnel requirements and a Performance Monitoring and Evaluation Plan.

### **A. Contents in a Scope of Work for Either a CPFF or a FFP Type Task Order**

- (1) Identification whether the TO is a CPFF or FFP type;
- (2) A Work Statement that is based upon performance standards, deliverables and results for which the contractor shall be held responsible with sections describing:
  - (a) Title
  - (b) Background
  - (c) Work Statement
- (3) Performance Monitoring Plan
- (4) Reports and Other Deliverables.
- (5) Period of Performance;
- (6) Technical Direction and Designation of Responsible USAID Officials (e.g., CO & CTO)
- (7) Logistic Support Provided by Mission or Bureau (if any)
- (8) Language Requirements;
- (9) Special Requirements/Relevant Information (e.g., source/origin waivers);
- (10) Government-Furnished Facilities or Property, if any, to be furnished to the contractor;
- (11) Authorized Work-Week
- (12) Place of Performance (Duty Post)
- (13) Key/Essential Personnel;

- (14) Other Labor Requirements; and
- (15) Payment Office
- (16) An Independent Government Cost Estimate including Personnel and Other Direct Costs
- (17) For Field Missions, the MAARD document.

## **B. Key Personnel**

The key personnel and their position title(s) for the performance of a TO should be designated in each Task Order. The key personnel proposed by the Contractor are considered to be essential to the work being performed. Unless otherwise agreed to by the CO, the Contractor shall be responsible for providing such personnel for performance of the task order. Unless failure to provide the designated key personnel is beyond the control, and without the fault or negligence, of the Contractor (e.g., non-acceptance or termination of employment by the individual, illness or death of the individual), failure to provide such key personnel as specified above may be considered non-performance by the Contractor. If the Contractor, at any time, is unable to comply with these requirements, the Contractor shall simultaneously notify, in writing, the CO and the CTO reasonably in advance of the individual's departure or non-acceptance of employment and shall submit written justification and explanation in sufficient detail (including implications for the total estimated cost of this task order) to permit evaluation of the impact on the program.

Replacement of key personnel cannot be made by the Contractor without the written consent of the Contracting Officer. Proposed substitutions by the contractor must be submitted simultaneously to the CO and the CTO not later than 30 days after the departure of, or non-acceptance of employment by, any of the approved Key Personnel. The proposed substitute personnel must have at least the same qualifications as the key personnel they are proposed to replace. Failure to do so may be considered nonperformance by the Contractor. The listing of key personnel may, with the consent of the contracting parties, be amended from time to time during the course of the task order to add, change, or delete personnel and positions, as appropriate.

## **C. Listing of Personnel**

Each TO should contain a list of all personnel requirements. The CTO and CO may find the draft functional labor category position descriptions in Appendix 2 helpful as illustrative templates. Additional skill, experience, language or other technical requirements may be requested as appropriate. Any of these suggested position descriptions may be modified or combined by the CO and CTO as appropriate for the TO requirements.

## **D. Performance Monitoring Plan**

Each TO should contain a Performance Monitoring Plan that will specify how performance is to be measured in the SOW. Contractors may be required to submit monitoring and evaluation plans (to include benchmarks, milestones, deliverable, results, performance indicators and standards, etc.) as requested by the CO and CTO.

## VII. IMPORTANT EPIQ II MANAGEMENT PROVISIONS

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### A. Acceptance of Goods/Services/Reports

USAID inspection and acceptance of services, reports and other required deliverables or outputs shall take place at the principal place of contractor performance or at any location specified in the TO where the services are performed and reports and deliverables or outputs are produced or submitted. The CTO listed in a TO may be delegated authority to inspect and accept all services, reports and required deliverables or outputs.

- (1) The contractor shall, upon receipt of the issued TO, promptly commence the work specified. USAID anticipates that, in certain circumstances, there may be very short notice of requirements for services under this contract and the contractor's prompt response to these requirements is required.
- (2) Subject to the prior written approval of the CTO (for a CPFF Task Order), the contractor may be authorized to continue performance under a Task Order beyond the estimated completion date set forth therein; provided that performance shall not extend beyond **60** calendar days from the original estimated completion date set forth in the Task Order. The contractor must attach a copy of the CTO's approval for such continued performance under the Task Order to the final voucher submitted for payment, and a copy to the CO. The decision to extend FFP Task Orders, if requested, shall be made by the CO's discretion. All extensions beyond 60 days must be signed and approved by the CO (e.g., via Task Order modification).
- (3) The contractor is not authorized to subcontract full or partial performance of TOs, unless the CO's consent has been provided.

### B. Contractor Performance Evaluation

#### INTERIM AND FINAL CONTRACTOR PERFORMANCE REPORTS (CIB 96-18)

- (1) ***Completion Evaluations.*** The contractor should receive an assessment of performance within 30 days of completion of contract activities. The contractor shall have 30 days to comment and/or rebut the assessment. The Agency has 15 days after receipt of the contractor's rebuttal to review and make a final determination.
- (2) ***Interim Evaluations.*** For multi-year Task Orders over \$100,000, interim past performance evaluations will be conducted after at least 12 months of performance have elapsed. Thereafter, interim evaluations will be conducted at the discretion of the CO. Generally, interim evaluations should be performed at least once in a two-year period.

## C. Reporting Requirements

### (1) *Periodic Progress Reports*

- (a) The contractor shall prepare and submit progress reports as specified in the Task Order contract. These reports are separate from the interim and final performance evaluation reports prepared by USAID in accordance with (48 CFR) FAR 42.15 and internal Agency procedures, but they may be used by USAID personnel or their authorized representatives when evaluating the contractor's performance.
  
- (b) **FFP Task Orders.** During any delay in furnishing a progress report required under this contract, the contracting officer may withhold from payment an amount not to exceed US\$25,000 (or local currency equivalent) or 5 percent of the amount of this contract, whichever is less, until such time as the contracting officer determines that the delay no longer has a detrimental effect on the Government's ability to monitor the contractor's progress.

## D. Payment Office

- (1) Vouchers shall be submitted to the payment office indicated on the Cover Page of each Task Order. Generally, this will be the USAID Washington Office/Bureau or the USAID overseas field Mission from which the funds for the TO are provided or, for Missions without their own Controller, the regional office responsible for that Mission.
  
- (2) Task Orders funded by USAID/Washington Bureaus or Offices will generally be paid by:

U.S. Agency for International Development  
Office of Financial Management  
Ronald Reagan Building  
7<sup>th</sup> Floor, M/FM/CMP, Room 7.07  
Washington, D.C. 20523

## Annex 1

# ILLUSTRATIVE FUNCTIONAL LABOR CATEGORIES

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The following section outlines illustrative tasks by labor category or groups of labor categories. This section is intended to provide additional information on how the subject matter knowledge and technical/analytical skills needed within each labor category could be applied to the tasks outlined in the Statement of Work for EPIQ II. Because EPIQ II is a Cost Plus Fixed Fee or Firm Fixed Price technical assistance mechanism, the position descriptions below are illustrative only, and are provided to assist USAID and contractors in the preparation of Statements of Work and proposals. However, these position descriptions may be modified in any appropriate manner, or entirely new position descriptions can be developed at the CO's or CTO's discretion. The positions are provided as an illustration of the types of positions generally expected to be needed based on prior policy reform experiences. Each position included in a TO is expected to be specified, as appropriate, to meet the specific needs of the RFP to be awarded by the mission or bureau.

### ENVIRONMENTAL POLICY SPECIALISTS

#### **Position Title: Environmental Economist**

**Education:** Master's degree in economics, or environmental or resource economics.

**Work Experience:** Must have at least 3 years of progressively more responsible international work experience.

**Supervisory Experience:** None

**Position Description:** The Environmental Economist may be asked to carry out activities such as: (1) conducting economic analyses of alternative approaches to environmental policies; (2) evaluating the economics and economic impacts of alternative environmental policies; (3) assisting host countries in developing environmental financing schemes; and (4) developing improved environmental policy options and promoting the adoption and implementation of improved policies.

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#### **Position Title: Environmental Lawyer**

**Education:** JLD.

**Work Experience:** Must have at least 3 years of progressively more responsible international work experience.

**Supervisory Experience:** None

**Position Description:** The Environmental Lawyer may be asked to carry out activities such as: (1) identifying and assessing the legal issues underlying environmental policies which constrain

sustainable economic development; (2) advising on environmental related administrative law, legislation, and decrees; (3) providing advice and support on the legal aspects needed to promote the adoption and implementation of improved policies; and (4) supporting and advising USAID and its partners on legal issues relating to transboundary and other international legal issues.

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**Position Title: Regulatory, Monitoring, and Enforcement Specialist**

**Education:** Bachelor's degree in a related subject matter area.

**Work Experience:** Must have at least 3 years of progressively more responsible international work experience.

**Supervisory Experience:** None

**Position Description:** The Monitoring, Enforcement, and Regulatory Specialist may be asked to carry out activities such as: (1) examine and assess the effectiveness of laws and regulations and their application for implementing environmental policies; (2) develop and recommend options for improvements in laws and strengthening local, national, and regional institutional and regulatory structures for improving the monitoring and enforcement of environmental policies and their performance; (3) assessing legal aspects of traditional, cultural, and codified property rights (ownership, access, and use); and (4) examining legal aspects of a country's environmental sector and developing options and recommendations for strengthening problematic administrative laws, roles, and responsibilities.

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**Position Title: Environmental Policy Specialist**

**Education:** Bachelor's degree in a related subject matter area.

**Work Experience:** Must have at least 3 years of progressively more responsible international work experience.

**Supervisory Experience:** None

**Position Description:** The Environmental Policy Specialist may be asked to carry out activities such as: (1) identifying and assessing environmental (sector) policies which constrain sustainable economic development; (2) developing improved policy options; (3) promoting the adoption and implementation of improved policies; and (4) assessing and advising on existing and potential conflicts to promote policies, actions and approaches to mitigate existing and/or potential conflicts. Emphasis should be placed on strengthening the capability of regional/transboundary or host country analysts and institutions to analyze cross-cutting or sector environmental policy issues, encourage a broad discussion of results and policy options among competing stakeholders, and monitor the implementation of improved policies.

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### **Position Title: Sustainable Tourism Specialist**

**Education:** Bachelor's degree in a related subject matter area.

**Work Experience:** Must have at least 2 years of progressively more responsible international work experience.

**Supervisory Experience:** None

**Position Description:** The Sustainable Tourism Development Specialist may be asked to carry out activities such as: (1) assessing market opportunities for tourism development; (2) designing tourism development activities aimed at improving cultural or biodiversity conservation and sound natural resource management; (3) examining the environmental and social aspects of tourism and tourism development; (4) strengthening the capability of host country institutions to develop and manage sustainable enterprises based upon the sound management of cultural or natural resources and the full participation of local communities; and (5) strengthening the ability of these institutions to manage adaptively while monitoring the social, cultural, ecological and economic aspects of tourism operations.

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### **Position Title: Private Sector Development**

**Education:** Bachelor's degree in a related subject matter area.

**Work Experience:** Must have at least 3 years of progressively more responsible international work experience.

**Supervisory Experience:** None

**Position Description:** The Enterprise Development Specialist may be asked to carry out activities such as: (1) assisting with the market analysis and commercialization of environmentally friendly products and services; (2) assisting with and training in cost analysis, financial projections, and bookkeeping; (3) assisting with the development of business plans incorporating the above elements; (4) strengthening the capability of host country institutions, especially community-based organizations, to develop and manage sustainable enterprises based upon the sound management of natural resources, and to monitor the social, cultural, ecological and economic aspects of enterprise operations; (5) developing improved policies and practices; and (6) assessing and disseminating lessons learned.

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### **Position Title: Social Scientist**

**Education:** Bachelor's degree in a social science.

**Work Experience:** Must have at least 3 years of progressively more responsible international work experience.

***Supervisory Experience:*** None

***Position Description:*** The Social Scientist may be asked to carry out activities such as: (1) assessing cultural, social and ecological aspects of ongoing and planned environmental policy and institutional governance activities and identifying appropriate policies, practices and approaches at the transboundary, national, or community levels; (2) analyzing cultural issues affecting development of environmental policies and institutional governance capacity building and incorporate issues into program development and implementation; (3) promoting tools and approaches for encouraging conflict resolution and adoption of appropriate environmental policies; (4) assessing institutional capability of community organizations, and advising on operational policies and actions to strengthen community organizations with an emphasis on cultural aspects and participation; (5) advising on host country legal frameworks, policies and practices; (6) analyzing gender issues that relate to participation in environmental policy programs—including promoting tools and approaches for encouraging participation and evaluating the effectiveness of environmental programs in reaching male and female stakeholders; (7) using simple assessment techniques (such as participatory rural appraisal, community mapping, and rapid ecological appraisal) to evaluate the cultural, social, economic and ecological aspects of biodiversity conservation and natural resource management activities; (8) identifying appropriate community-based natural resource management policies and practices; and (9) advising on host country policies and practices relating to community-based management of natural resources.

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**Position Title:** Environmental Impact Assessment

***Education:*** Bachelor's degree in a related subject matter area.

***Work Experience:*** Must have at least 3 years of progressively more responsible international work experience.

***Supervisory Experience:*** None

***Position Description:*** The Environmental Impact Assessment Specialist may be asked to carry out activities such as: (1) assuring compliance with USAID Regulation 216 and relevant sections of the Foreign Assistance Act with regard to USAID activities; (2) assessing environmental and social impacts of planned or ongoing development activities; and (3) advising on steps and actions to mitigate potential or existing negative impacts of development activities.

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**Position Title:** Development Economist

***Education:*** Master's degree in economics, or environmental or natural resource economics.

***Work Experience:*** Must have at least 3 years of progressively more responsible international work experience.

***Supervisory Experience:*** None

**Position Description:** The Development Economist may be asked to carry out activities including analyzing the overall impact of macro-economic (fiscal, trade, etc.) policies and the overall economy on the environment in developing countries.

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**Position Title: Global Climate Change Specialist**

**Education:** Bachelor's degree in a related subject matter area.

**Work Experience:** Must have at least 2 years of progressively more responsible international work experience.

**Supervisory Experience:** None

**Position Description:** The Global Climate Change specialist may be asked to carry out activities such as: 1) Assistance to increase carbon storage through forestry and land-use activities. Such assistance should include, but not be limited to, supporting the technical capability, expertise, and information of developing countries in the conservation and protection of carbon stocks; 2) Assistance to reduce net greenhouse gas emissions from the energy sector, industries and urban areas. Such assistance should include, but not be limited to, knowledge of power sector and tariff reforms, energy efficiency, renewable energy, clean energy, and industrial emissions; 3) Assistance to strengthen participation in goals of the UNFCCC. Such assistance should include, but not be limited to, integrating climate change into national development strategies; establishing emissions inventories; developing national climate change action plans; evaluating greenhouse gas mitigation project proposals; and conducting modeling activities; and 4) Assistance to reduce vulnerability to the threats posed by climate change. Such assistance should include, but not be limited to, assessing the environmental, economic and developmental impacts of climate change and evaluating adaptation measures.

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**Position Title: Multilateral Environmental Agreements (MEA) Specialist**

**Education:** Bachelor's degree in related subject matter area.

**Work Experience:** Must have at least 2 years of progressively more responsible international work experience.

**Supervisory Experience:** None

**Position Description:** The MEA Specialist may be asked to carry out activities such as: (1) assessing the economic, institutional and ecological aspects of national policies and international conventions or treaties related to other environmental issues; (2) evaluating present and future activities related to MEAs; (3) advising on the design and implementation of MEA conventions and treaties (e. g. , CITES or Habitat); and (4) assessing ecological, economic, institutional, or development impacts of MEAs on national or regional environmental quality and services.

## NATURAL RESOURCE MANAGEMENT SPECIALISTS

### **Position Title: Natural Resources Policy/Management Specialist**

**Education:** Bachelor's degree in an environmentally related subject matter area.

**Work Experience:** Must have at least 3 years of progressively more responsible international work experience.

**Supervisory Experience:** None

**Position Description:** The Natural Resources Policy/Management Specialist may be asked to carry out activities such as: (1) identifying and assessing natural resource management policies which constrain or could enhance sustainable economic development, effective biodiversity or forestry conservation, and sound natural resource management; (2) developing improved policy options; (3) promoting the adoption and implementation of improved policies; and (4) assessing and advising on existing and potential conflicts to promote policies, actions and approaches to mitigate existing and/or potential natural resource use or management conflicts. Emphasis should be placed on strengthening the capability of host country analysts and institutions to analyze natural resource environmental policy and management issues, encourage a broad discussion of results and policy options among competing stakeholders, and monitor the implementation of improved policies.

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### **Position Title: Water Resources Management Specialist**

**Education:** Bachelor's degree in water resources management, or a related subject matter area.

**Work Experience:** Must have at least 3 years of progressively more responsible international work experience.

**Supervisory Experience:** None

**Position Description:** The Water Resources Management Specialist may be asked to carry out activities such as: (1) assess the current status and effectiveness of water resources management practices, policies, and institutions, including freshwater and coastal/marine, within a country or basin; (2) lay out participatory approaches to water resources planning and management for preparation of strategies and implementation of programs; (3) oversee and direct multidisciplinary teams to analyze water management using a multi-sectoral approach (considering technological, socio-economic, environmental, and health issues relating to quantity and quality of surface water and groundwater in terms of urban water supply and sanitation, industrial water pollution prevention and control, and water conservation, agricultural irrigation, land use, hydropower, and ecosystem protection); (4) identify and prioritize threats to protecting, conserving, and sustaining water and coastal resources; (5) recommend policy, institutional, human resource, and financial arrangements to improve water management systems; (6) develop and promote schemes for rational water use and public awareness, educational programs, and application of economic instruments such as appropriate water tariffs; and (7) advise and support

USAID and partners participating in regional or international discussions of issues relating to integrated water resources management.

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**Position Title: Coastal Resources Management**

**Education:** Bachelor’s degree in coastal resources management or a related subject matter area.

**Work Experience:** Must have at least 3 years of progressively more responsible international work experience.

**Supervisory Experience:** None

**Position Description:** The Coastal Resources Specialist may be asked to carry out activities such as: (1) assess the current status and effectiveness of coastal zone management practices, policies, and institutions, within a coastal region or country; (2) lay out participatory approaches to coastal zone planning and management for preparation of strategies and implementation of programs; (3) oversee and direct multidisciplinary teams to analyze coastal zone management using a multi-sectoral approach; (4) identify relationships between biological and physical systems to ensure overall environmental sustainability; (5) recommend policy, institutional, human resource, and financial arrangements that integrate economic development and ecosystem objectives (including mariculture, fisheries, coral reef management, information systems, tourism, zoning, and marine pollution); (6) develop and promote schemes for coastal zone public awareness and educational programs; and (7) advise and support USAID and partners participating in regional or international discussions of issues relating to integrated coastal zone management.

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**Position Title: Environmental Scientist**

**Education:** Bachelor’s degree in an environmentally related science.

**Work Experience:** Must have at least 3 years of progressively more responsible international work experience.

**Supervisory Experience:** None

**Position Description:** The Environmental Scientist would have a technical, science based training in one or more of the following areas: biodiversity, ecology, watershed management, pesticide use and management, forestry, wildlife/parks and protected areas management, or other related areas. The Environmental Scientist may be asked to carry out activities such as: (1) assessing the status of protected natural resources and related areas/natural resources—such as the hydrologic, ecological and economic aspects of watershed or forestry resources, or assessing the ecological requirements for maintenance of viable wildlife (land based or aquatic) populations; (2) evaluating present and future demands on biodiversity and other natural resources; (3) identifying and understanding key threats, conflicts, and constraints to sustainable natural resource management and biodiversity conservation—often involving multiple use

management techniques; (4) developing priorities and strategies for USAID assistance; (5) assisting in the development and implementation of appropriate natural resource use policies, uses and practices; (6) assisting in the development of transboundary, national, or community based conservation strategies; (7) evaluating the technical implementation of natural resource management strategies and programs; (8) assisting host country management authorities with implementation of international conventions and treaties; (9) evaluating and strengthening institutions responsible for protected area and natural resources management; (10) evaluating the personnel, training, and infrastructure requirements for effective management of natural resources; and (11) assisting with the development and implementation of management plans and monitoring plans for protected areas and natural resources.

## **URBAN SECTOR SPECIALISTS**

### **Position Title: Urban Policy and Infrastructure Specialist**

**Education:** Bachelor's degree in urban development, urban planning, or a related subject matter area.

**Work Experience:** Must have at least 3 years of progressively more responsible international work experience.

**Supervisory Experience:** None

**Position Description:** The Urban Policy and Infrastructure Specialist may be asked to carry out activities such as: (1) evaluate the environmental policy, privatization, and institutional capacity development aspects of current and proposed urban environmental infrastructure and facilities, and their management plans; (2) recommend proper policy, siting, management, institutional governance, and financing measures to ensure the sustainable and efficient operation of solid or hazardous waste, wastewater treatment and reuse, potable water and distribution infrastructure and facilities; (3) assist and support local and national officials (and communities) to plan, implement, and manage policy and other activities for urban infrastructure and facilities projects; and (4) advise and support USAID in community, regional, and national policy and operational considerations of urban environmental infrastructure development and management.

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### **Position Title: Regional/Urban Land Use Planning Specialist**

**Education:** Bachelor's degree in regional/urban land use planning.

**Work Experience:** Must have at least 3 years of progressively more responsible international work experience.

**Supervisory Experience:** None

**Position Description:** The Regional/Urban Land Use Planning Specialist may be asked to carry out activities such as: (1) assessing status of regional and urban land uses; (2) evaluating present

and future demands on natural resources; (3) identifying land use policies which constrain sustainable development; (4) developing priorities and strategies for USAID assistance; (5) assisting in the development and implementation of appropriate regional and urban land use policies, strategies, uses and practices; and (6) assisting in the establishment of national monitoring and evaluation systems for regional and urban land use management.

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**Position Title: Pollution Prevention and Control Specialist**

**Education:** Bachelor's degree in environmental engineering or related engineering subject matter areas.

**Work Experience:** Must have at least 3 years of progressively more responsible international work experience.

**Supervisory Experience:** None

**Position Description:** The Pollution Prevention and Control Specialist may be asked to carry out activities such as: (1) evaluate and develop remediation activities to promote the environmental, social, economic, privatization, and institutional governance development aspects of current and proposed industrial pollution and prevention management activities—including technology transfers and audits; (2) recommend proper siting, management, and financing measures to ensure the sustainable and efficient operation of pollution prevention activities either in the context of an individual facility or for a larger site; (3) assist and support local and national officials (and communities) to plan, implement, and manage environmental management plans and to ensure enhanced public-private partnerships to monitor and enforce pollution standards; and (4) advise and support USAID in community, regional, and national considerations of urban environmental infrastructure development and management.

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**Position Title: Environmental Engineer**

**Education:** Bachelor's degree in environmental engineering.

**Work Experience:** Must have at least 3 years of progressively more responsible international work experience.

**Supervisory Experience:** None

**Position Description:** The Environmental Engineer may be asked to carry out activities such as: (1) evaluate the technical engineering and cost aspects of current and proposed urban environmental infrastructure and facilities plans; (2) recommend proper technical engineering, siting, and operational measures to ensure the sustainable and efficient operation of solid or hazardous waste, wastewater treatment and reuse, potable water and distribution, or other environmental infrastructure and facilities; (3) assist and support local and national officials (and communities) to plan, design, implement, and manage infrastructure and facilities projects; and

(4) provide technical advice and support for USAID activities relating to community, regional, and national considerations of urban environmental infrastructure development and management.

## **ENERGY SECTOR SPECIALISTS**

### **Position Title: Energy Economist**

**Education:** Master's degree in an economics, environmental, or natural resource economics.

**Work Experience:** Must have at least 3 years of progressively more responsible international work experience.

**Supervisory Experience:** None

**Position Description:** The Energy Economist may be asked to carry out activities such as: (1) conducting economic analyses of alternative approaches to energy supply, demand, conservation, efficiency, and cleaner energy production and use policies; (2) evaluating the economic impacts and appropriate economic instruments for alternative energy sector policies; (3) assisting host countries in developing energy sector financing, restructuring, and privatization schemes; and (4) developing, promoting, and implementing improved energy sector policy options.

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### **Position Title: Energy Policy**

**Education:** Bachelor's degree in a related subject matter area.

**Work Experience:** Must have at least 3 years of progressively more responsible international work experience.

**Supervisory Experience:** None

**Position Description:** The Energy Policy Specialist may be asked to carry out activities such as: (1) identifying and assessing energy policies which constrain or could enhance sustainable economic development; (2) developing improved energy sector policy and energy sector restructuring/privatization options; (3) promoting the adoption and implementation of improved energy sector, restructuring, and privatization policies; (4) assessing and advising on improved policies, economic instruments and incentives, and institutional governance to promote policies, actions and approaches for enhanced energy efficiency, energy conservation, renewable energy, and cleaner energy production and use; and (5) promote policies, actions and approaches to strengthen the capability of regional/ transboundary or host country analysts and institutions to analyze and participate regional and transboundary energy policy issues and activities.

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**Position Title: Power Engineer**

*Education:* Bachelor's degree in power engineering or a related engineering subject matter area.

*Work Experience:* Must have at least 3 years of progressively more responsible international work experience.

*Supervisory Experience:* None

*Position Description:* The Power Engineer may be asked to carry out activities such as: (1) evaluate the technical engineering and cost aspects of current and proposed energy sector infrastructure and facilities plans; (2) recommend proper technical engineering, siting, and operational measures to ensure the sustainable and efficient operation of power supply and distribution infrastructure and facilities; (3) assist and support local and national officials (and communities) to plan, design, implement, and manage power infrastructure and facilities projects; and (4) provide technical advice and support for USAID activities relating to community, regional, and national considerations of power infrastructure development and management.

**INSTITUTIONAL DEVELOPMENT SPECIALISTS**

**Position Title: Monitoring and Evaluation Specialist**

*Education:* Bachelor's degree in a related subject matter area.

*Work Experience:* Must have at least 3 years of progressively more responsible international work experience.

*Supervisory Experience:* None

*Position Description:* Monitoring and Evaluation Specialist may be asked to carry out activities such as: (1) assisting USAID missions and partners in the assessment of monitoring and evaluation needs and opportunities, and (2) assisting USAID missions and their development partners in the development of cost-effective monitoring and evaluation systems.

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**Position Title: Institutional/Organization Development Specialist**

*Education:* Bachelor's degree in a related social science subject matter area.

*Work Experience:* Must have at least 3 years of progressively more responsible international work experience.

*Supervisory Experience:* None

*Position Description:* The Institutional/Organizational Development Specialist may be asked to carry out activities such as: (1) assessing the institutional development needs and opportunities

of client institutions; (2) identifying appropriate operational policies, actions and approaches to strengthen the development of client institutions; (3) assisting client institutions develop their vision and mission statements, plan and carry out short- and long-term development plans, including personnel development, financial management, program implementation, monitoring and evaluation, communications and outreach; (4) assisting USAID missions and partners in the assessment of the financial management needs and opportunities of client institutions; (5) identifying appropriate operational policies, actions and approaches to strengthen the financial management of client institutions; and (6) assisting client institutions to develop and carry out financial management plans that may include strengthening accounting systems and fund raising.

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**Position Title: Training & Human Resources Development Specialist**

*Education:* Bachelor's degree in a social science or related subject matter area.

*Work Experience:* Must have at least 3 years of progressively more responsible international work experience.

*Supervisory Experience:* None

*Position Description:* The Training & Human Resources Development Specialist may be asked to carry out activities such as: (1) conducting training needs assessments; (2) identifying appropriate training, facilitating or carrying out training courses as appropriate; and (3) advising on procedures for monitoring and evaluating the impact of training efforts.

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**Position Title: Information Management Specialist**

*Education:* Bachelor's degree in information management or a related subject matter area.

*Work Experience:* Must have at least 3 years of progressively more responsible international work experience.

*Supervisory Experience:* None

*Position Description:* The Information Management Specialist may be asked to carry out activities such as: (1) assessing the information management needs and opportunities of client institutions; (2) identifying appropriate operational policies, actions and approaches to strengthen the information management systems of client institutions; and (3) assisting client institutions develop and carry out information management plans and communication and outreach programs.

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**Position Title: Grant Specialist**

*Education:* Bachelor's degree.

*Work Experience:* Must have at least 2 years of progressively more responsible international work experience.

*Supervisory Experience:* None

*Position Description:* The Grant-making Specialist may be asked to carry out activities such as: (1) assessing the grant-making programs of client organizations and advising on appropriate operational grant-making policies and practices; (2) designing and implementing grant making programs aimed at supporting environmental policy reform and institutional governance; and (3) advising on approaches for strengthening the capability of prospective grantees, procedures for monitoring and evaluating development impacts, and communication and outreach programs to disseminate results and other information regarding grant-making programs.

**COMMUNICATIONS SPECIALISTS**

**Position Title: Environmental Education and Awareness Specialist**

*Education:* Bachelor's degree in communications or other related subject matter area.

*Work Experience:* Must have at least 3 years of progressively more responsible international work experience.

*Supervisory Experience:* None

*Position Description:* The Environmental Education and Awareness Specialist may be asked to carry out activities such as: (1) assessing environmental education and awareness communication needs; and (2) identifying, monitoring, implementing and evaluating appropriate environmental education and awareness communication activities and outreach programs to promote effective environmental policies and policy reform.

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**Position Title: Communications and Outreach**

*Education:* Bachelor's degree in public relations, communications, or other related subject matter area.

*Work Experience:* Must have at least 3 years of progressively more responsible work experience.

*Supervisory Experience:* None

*Position Description:* The Communications and Outreach Specialist may be asked to carry out activities such as: (1) assessing communication needs; and (2) identifying and implementing

appropriate communication activities and programs to promote effective biodiversity conservation and sound natural resources management. Emphasis should be placed on changing targeted behavior as well as on increasing the understanding of target clientele.

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**Position Title: Technical Writer/Editor**

**Education:** Bachelor's degree preferred.

**Work Experience:** Must have at least 3 years of progressively more responsible work experience.

**Supervisory Experience:** None

**Position Description:** The Technical Writer/Editor may be asked to carry out activities such as: (1) assessing communication and technical writing needs; (2) editing technical materials; and (3) identifying and implementing appropriate activities and programs to promote effective communication regarding biodiversity conservation and sound natural resources management.

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**Position Title: Internet Applications Specialist**

**Education:** Bachelor's degree in information technology or related subject matter area.

**Work Experience:** Must have at least 3 years of progressively more responsible work experience.

**Supervisory Experience:** None

**Position Description:** The Internet Applications Specialist may be asked to carry out activities including advising on the use of the internet (including setting up and operating sites on the internet) and other computer-based platforms to communicate information related to biodiversity conservation and natural resources management.

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**Position Title: Workshop/Conference Facilitator**

**Education:** Bachelor's degree.

**Work Experience:** Must have at least 3 years of progressively more responsible work experience. Mission and regional bureaus may ask for a certain level of international work experience.

**Supervisory Experience:** None

**Position Description:** The Workshop/Conference Facilitator may be asked to carry out activities such as advising on the planning of workshops/conferences, and assisting in carrying out workshops and conferences.

## ADMINISTRATIVE AND LOGISTICAL SPECIALISTS

### **Position Title: Chief of Party/ Deputy Chief of Party**

**Education:** Bachelor's degree.

**Work Experience:** Must have at least 5 years of progressively more responsible international work experience.

**Supervisory Experience:** Must have at least 5 years of progressively more responsible supervisory work experience (see position description below) including: (1) direct supervision of professional and support staff; (2) quality evaluation of staff performance and deliverables; and (3) contract management.

**Position Description:** The Chief of Party/ Deputy Chief of Party shall have the authority and responsibility to administer and manage individual Task Orders. These task order responsibilities may include, but are not limited to the following: (1) technical leadership for and supervision of consultant staff; (2) quality control and timeliness of all deliverables; (3) preparation or supervision of work plans, financial, logistical and other documents; (4) review of all financial and logistical information on a periodic basis; (5) recommendation and evaluation of proposed staff; (6) serving as primary point of contact for the contractor to the USAID Contracting Officer and Cognizant Technical Officer; (7) serving as principal liaison with USAID staff, institutions, and client country partners to exchange information and develop professional relationships; and (8) making verbal or written presentations as requested by the CTO to varied audiences.

NOTE: On all long-term Task Orders (greater than 1 year), the Prime Contractor shall have the responsibility to hire a Chief of Party and/or Deputy Chief of Party, if requested in the Task Order.

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### **Position Title: Administrative Support**

**Education:** Bachelor's degree preferred.

**Work Experience:** Must have at least one year work experience.

**Supervisory Experience:** None

**Position Description:** The Administrative Support Specialist may be asked to carry out activities such as: (1) assessing administrative needs; (2) data collection and management; and (3) providing administrative support in the planning, implementation and evaluation/ oversight of activities related to environmental policy and institutional governance.

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**Position Title: Financial/Accounting**

**Education:** Bachelor's degree preferred in business or finance/accounting.

**Work Experience:** Must have at least 3 years of progressively more responsible international contract work experience.

**Supervisory Experience:** None

**Position Description:** The Financial/Accounting Support Specialist may be asked to carry out activities such as: (1) assessing financial and accounting needs; (2) financial and accounting data management; and (3) providing administrative support in the planning, implementation and evaluation of project, financial and accounting controls.

## Annex 2

# CONTRACTORS AND SUBCONTRACTORS

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There are three contractors under EPIQ II:

- 1. PRIME CONTRACTOR: CHEMONICS**  
**Contract No. EPP-I-00-03-00014-00**  
**1133 20<sup>th</sup> Street, N.W.**  
**Suite 600**  
**Washington, DC 20036**  
**Project Manager: Avrom Ben-David Val**  
**Phone: (202) 955-7417**  
**Fax: (202) 955-3400**  
**E-Mail: [abendavid@chemonics.net](mailto:abendavid@chemonics.net)**

**Chemonics International Inc.:** As one of the most technically diverse firms in the industry, Chemonics focuses on sustainable development, establishing and maintaining an outstanding record of high-quality, donor-funded assistance and world-class teams of professionals experienced in USAID work.

Projects like Land Reform (Kyrgyzstan); Alternative Development (Peru and Colombia); General Business; Trade and Investments IQC worldwide; Competitiveness Initiatives (Dominican Republic); Capital Markets Development (Egypt); and Economic Opportunities (Guyana), have given Chemonics expertise in policy analysis, dialogue, implementation, evaluation and dissemination, and experience integrating economic development and environmental concerns.

We are effective at strengthening institutional governance by working with counterparts to realign institutional objectives, responsibilities, reporting, and staffing patterns to better serve project goals. Successful projects include Institutional Development Services for Secondary Cities (Egypt), Strengthening the Ministry of Sustainable Development and Planning (Bolivia), and Institutional Strengthening of the Electric Corporation (Kosovo).

Chemonics offers expertise in a range of environmental technical areas, from natural resource management – protection of soils, forests, wetlands, water and coastal resources, and biodiversity – to urban and industrial environmental management and energy issues. Projects range from Biodiversity and Sustainable Forestry worldwide, Natural Resources Management (Botswana) and Watershed Protection and Management (Morocco) to Water Pollution Abatement (Romania) and Air Quality Improvement (Cairo).

### **SENIOR STAFF:**

**Avrom Bendavid-Val, IQC Manager,** is the Chemonics Vice President for Environment and Development. He is a senior economist and environmental management systems (EMS) specialist with nearly 40 years experience in environmental management and regional and urban economic development. Before becoming IQC Manager for the Chemonics EPIQ consortium he

served as chief of party of two large multi-country USAID projects (PRIDE and EAPS) dealing with environmental finance, public/private partnerships, competitiveness, water and wastewater management, low-stack emissions, pollution prevention (P2), solid waste management, energy efficiency and demand management, environmental institutional assessment and strengthening, environmental policy, regulatory compliance incentives and enforcement, environmental metrics, EMS, and related environment and development subjects in the Middle East and Europe and Eurasia regions. He has also recently served as project manager and senior technical specialist for two multi-year EMS, P2, and water resource management projects in Romania. His book *Regional and Local Economic Analysis for Practitioners* (Greenwood Press) has, over the course of 30 years and four editions, become recognized worldwide as a basic text and working reference in economic analysis for development decision making at subnational levels. Mr. Bendavid-Val is a certificated ISO 14001 auditor, co-author of *Green Profits: The Manager's Handbook for ISO 14001 and Pollution Prevention* (Butterworth-Heinemann, March 2001), and co-author of *Achieving Environmental Excellence: Integrating P2 and EMS to Increase Profits* (Government Institutes, March 2003).

**Christopher Perine, Deputy Chief of Party**, is an environmental management specialist with broad experience designing and implementing environment and natural resources projects around the world. He has special expertise in the areas of environmental assessment (EA), environmental policy formulation, and environmental monitoring and evaluation. He has worked extensively for USAID, the Asian Development Bank, and the Global Environment Facility. Pursuant to 22 CFR 216, he has conducted EA studies for a range of infrastructure projects, including roads, water systems and industrial estates, and reviewed numerous Initial Environmental Examinations (IEEs). In addition, Mr. Perine has prepared strategies to guide investment in natural resources, environmental management, and energy efficiency for USAID and other agencies. He also has developed environmental indicators for projects in Asia and the Middle East.

**David Gibson, Chemonics Senior Manager and EPIQ II Senior Policy Advisor**, has supported natural resources and sustainable agriculture management programming in 40 countries across all regions during the past 25 years. He managed long-term watershed management, sustainable agriculture, and forestry projects from 1977 to 1986 and then served as a natural resources and agriculture advisor to USAID's regional programs in East Africa and Latin America from 1986-1994. He also helped organize and manage the first and only airline dedicated to sustainable tourism development (USAfrica Airways) where he directed corporate responsibility and responsible travel services. Since joining Chemonics International eight years ago Dave has managed numerous environment and natural resources management projects across all regions with major initiatives in community-based conservation and industrial environmental management by championing market-based approaches. He has helped lead Chemonics interests in 3rd party certification systems and manages numerous initiatives to support development of food safety, forest certification, and organic agriculture production standards and supporting policies. He has advanced degrees in land use planning, forestry, and wildlife biology. He is a Certified auditor in Environmental Management Systems (ISO 14001), Social Accountability (SA 8000), and the Forest Stewardship Council system (Smartwood Assessor).

**David Fratt, Chemonics Senior Manager and EPIQ II Senior Policy Advisor**, is a senior environmental scientist with overseas and US domestic experience in urban environmental

management focused on urban pollution mitigation planning, risk assessment and management, environmental information and communications, and environmental policy and institutional capacity building. Oversees implementation of USAID's Livelihood and Income from Environment (LIFE), Lead Pollution Abatement Project, a six-year, \$6 million effort to clean up former lead manufacturing sites and surrounding areas in densely populated areas of Cairo. Major emphasis on health assessment and impact mitigation and community involvement and empowerment. Recently served as chief of party for Cairo Air Improvement Project (CAIP) and add-on policy work under the Egyptian Environmental Policy Program. Provided overall management of the project and its Cairo-based office of more than 50 staff, ensuring technical, contractual, and financial performance of the project. Oversaw planning and implementation of all technical activities, hiring long- and short-term staff and subcontractors, and monitoring the budget, schedule performance, and work product quality. Related project management and technical experience in air quality, waste management, and water quality for a variety of pollution source types including power plants, industrial facilities, vehicles, and waste sites. Team leader and technical roles on environmental institution needs assessment and capacity building projects in Russia, Central Asia, and Romania and many other geographic areas.

**Mario Kerby, Chemonics Senior Manager and EPIQ II Senior Policy Advisor**, is a senior environmental economist with 20 years of experience in environmental policy and support to environmental institutions worldwide, including Morocco, Angola, Bulgaria, and the United States. Expertise in project management; economic impact analysis of environmental projects; regulatory impact analysis; cost-benefit analysis; technology assessment; compute modeling; tariff-setting for water and wastewater projects; and valuation of natural resource damage from hazardous and solid waste contamination. Mr. Kerby has managed or participated in numerous projects for the U.S. Environmental Protection Agency, the U.S. Trade and Development Agency (TDA), state environmental agencies, and international funding institutions. Mr. Kerby recently completed seven years as chief of party (COP) on Chemonics' contracts for successive USAID water resources and watershed protection projects in Morocco. In course of this service, he prepared reports on lessons learned from implementing environmental management pilot activities and supervised multidisciplinary studies on environmental policy, economic impact analysis, and institutional development. Prior to being fielded in Morocco, Mr. Kerby was a Vice-President with ICF Consulting.

#### **SUBCONTRACTORS:**

**Abt Associates Inc.** provides clients worldwide with innovative consulting services and solutions for the most complex environmental management, regulatory, and policy challenges. Much of our environment sector experience includes economics and regulatory analysis, health-risk assessment modeling, industry sector analysis, environmental Internet and software applications, and natural resources management. Abt Associates delivers practical, measurable, high-value-added results. Our staff includes national and international experts who are recognized for their knowledge, innovative research techniques, and insightful analyses and recommendations.

**Clear Concepts** is a small, woman-owned business whose goal is to present complex information in a clear, usable written format. Technical writing and editing services focus on international development and reflect an extensive understanding of environmental and natural resource policy development and implementation issues. *Clear Concepts* has U.S. and

international experience in the development and production of documents related to water resource planning, groundwater monitoring and remediation, environmental management, solid waste disposal, and water and wastewater engineering.

**The Environmental Law Institute (ELI)** is an internationally recognized, independent research and education center with projects spanning five continents. ELI seeks to improve environmental law, policy, and management and build institutional governance for environmental protection in partnership with NGOs, governmental agencies, and national law centers by engaging in research, providing assistance in drafting and reforming environmental laws, and developing training and educational programs.

**Environomics, Inc.** is a small business that provides consulting in environmental strategic planning, institutional governance, economic analysis, and policy analysis for government agencies and business, both internationally and in the U.S.. Environomics' primary client has been the U.S. Environmental Protection Agency, and the firm has completed assignments in 10 developing or transitional countries.

**ICF Consulting** develops solutions to complex environment, energy, emergency management, community development, and transportation challenges. We offer unique expertise in design, implementation, and evaluation of environmental policies and projects to address global climate change, air and water quality, cleaner production, remediation, environmental impact assessment, and health and safety issues. Our approach to these issues is strengthened by our expertise in information technology, organizational improvement, and strategic communications.

**International Programs Consortium (IPC)** is a small, woman-owned business specializing in implementing environmental policy and institutional development activities, particularly policy analysis, environmental economics, transboundary environmental agreements, dispute resolution, NGO capacity-building, grant programs, program evaluations, and gender impact assessments.

**IUCN**, formed in 1948, is the world's largest conservation organization, bringing together 78 states, 112 government agencies, 735 NGOs, 35 affiliates, and some 10,000 volunteer scientists and experts from 181 countries in a unique worldwide partnership. Its highly-regarded Environmental Law Center provides technical assistance and reference services for environmental law and international trade.

**Millennium Science & Engineering (MSE)** is a premier environmental consulting engineering company serving industrial and governmental clients on industrial wastewater treatment, EMS, environmental auditing, pollution prevention, soil and groundwater remediation and modeling, and design/construction/start-up/operations of various environmental facilities.

**Moore Media Group** provides global communication services in broadcast and multimedia production, Internet solutions for e-government and e-commerce, public relations, and media and journalist training.

**Resources for the Future (RFF)** is a nonprofit, nonpartisan think tank that employs social-science methods to analyze environmental law and institutions, energy policy, land and water use, hazardous waste, and biodiversity issues. RFF has particular strength in environmental policy, and in research about and applied practical applications of institutional governance in the

developing world and the countries in economic and political transition. RFF is known globally for its expertise linking environment and economic growth.

**SENTECH, Inc.** is energy and environmental consulting firm providing technical, management, and outreach services to clients in energy efficiency, renewable energy, distributed generation, village power, and advanced transportation technologies. Our core services include: technology assessment for policy development; technical and economic feasibility analysis; analysis tool development; program planning; implementation of voluntary programs; SME strengthening; education; outreach; and conference planning.

**World Wildlife Fund (WWF)**, the leading privately supported international conservation organization in the world, works in partnership with governments, local communities, international agencies, and the private sector in nearly 100 countries. WWF focuses on environmental policy, cutting-edge conservation science, education and institutional governance building to protect biodiversity and ensure sustainable natural resource use. WWF works to protect not only specific species and habitats but also entire ecosystems.

2. **PRIME CONTRACTOR: INTERNATIONAL RESOURCES GROUP (IRG)**  
**Contract No. EPP-I-00-03-00013-00**  
**1211 Connecticut Ave, N.W.**  
**Suite 700**  
**Washington, DC 20036**  
**Project Manager: Doug Clark**  
**Phone: (202) 289-0100**  
**Fax: (202) 289-7601**  
**Email: [dclark@irglt.com](mailto:dclark@irglt.com)**

**International Resources Group (IRG)** is an international professional services firm that helps governments, the private sector, communities, and households manage critical resources to build a cleaner, safer, and more prosperous world. Since 1978, IRG has completed over 600 contracts in more than 125 countries, delivering high-quality, cost-effective services that promote equitable economic growth, institutional and social change, and intelligent use of resources—human, physical, environmental, financial. IRG’s environmental and natural resource policy experience includes development, implementation, and successful completion of 72 task orders with a funding value of approximately \$104.9 million under EPIQ I. IRG’s ability to provide effective management and sound economic and technical advice is enhanced by the diversity, cross-cultural experience, foreign language skills, and management capabilities of staff based in Washington, DC headquarters; corporate offices in India, Indonesia, and the Philippines; and 20-project-dedicated offices around the world. IRG is a proven, effective manager of large USAID IQCs, and maintains strong subcontractor relationships through which USAID can gain easy and full access to an extensive range of experienced development specialists. IRG works in virtually all USAID pillar and program areas, linking environmental policy with the Agency’s economic development, health, education, agriculture, and humanitarian and disaster relief mandates.

**SENIOR STAFF:**

**Doug Clark, Corporate Vice President and EPIQ II IQC Manager.** His more than 30 years of experience in international economic development includes 27 years with USAID. Most recently, Mr. Clark served as Coordinator for the first Environmental Policy and Institutional Strengthening (EPIQ) IQC. In that capacity, he oversaw implementation of 72 task orders, and managed an EPIQ I staff of 46 long-term US technical experts in developing countries, including 18 Chiefs of Party, over 300 long-term cooperating country national staff, and three Senior Policy Advisors. For the full life of EPIQ (1996 to 2002), he remained closely involved in the technical work of the Egypt Water Policy Reform task order, an important element of the USAID/Egypt Agricultural Policy Reform program, and the Egypt Red Sea eco-tourism activity. Mr. Clark’s former positions include Chief of Party for the Environmental and Natural Resource Policy and Training (EPAT) project; Associate Mission Director for Agricultural Resources, USAID/Egypt; and Director of the Office of Technical Resources, USAID/Thailand. Mr. Clark holds an MPS in International Development from Cornell University. He is fluent in Thai.

**Russell Misheloff, IRG Senior Manager and EPIQ II Deputy IQC Manager.** Mr. Misheloff served as a Senior Policy Advisor on the EPIQ I IQC and brings 30 + years of experience working in development programs in more than 20 countries worldwide. He is experienced in the management and conduct of programs related to strategic planning, assessment of environmental and natural resource policy and management options, and strengthening of institutions that have

environmental and natural resource policy analysis, management and regulatory functions. His work has involved policy and management responses to air and water pollution, efficient allocation and use of water resources, deforestation, loss of biodiversity, soil degradation, financing of urban environmental services, and provision of training in analytical approaches to environmental policy development and in economic valuation of environmental and natural resource investments. Mr. Misheloff previously served as Environmental Economist and Program Manager in USAID's Office of Environment and Natural Resources. He holds an MA in Economics from American University and an MA in International Relations from the University of Pennsylvania. Mr. Misheloff has Spanish language facility.

**Glen Anderson, IRG Senior Manager and EPIQ II Senior Policy Advisor.** Dr. Anderson, an economist, brings extensive professional expertise in policy and institutional governance in developing and transitional countries, including working in senior consulting positions for USAID, World Bank, and OECD-funded programs. He has 22 years of international experience in the areas of environmental policy, taxation, finance, benefit-cost analysis, and strategic planning. Dr. Anderson has acted as Senior Environmental Policy Advisor to the Government of Poland for a large USAID economic and policy project, Senior Economist for the North Carolina Environmental Defense Fund and the Environmental Law Institute, and economist for the U.S. Environmental Protection Agency. He has authored numerous publications on environmental economics, policy, and financing. He holds a PhD in Agricultural Economics from the University of Wisconsin at Madison.

**James Tarrant, IRG Senior Manager, and EPIQ II Senior Policy Advisor.** Dr. Tarrant is a political economist with expertise in environmental governance and policy in developing countries and brings 30 years of environmental research, technical and project design, implementation and assessment in subjects ranging from renewable energy, environmental impact assessment, watershed management, co-management approaches to natural resources and environmental protection and natural resource economics and finance. He managed environmental projects at USAID in the Europe and New Independent States Bureau, the Near East Bureau, and the Asia Bureau. Since 1997, Dr. Tarrant has worked with International Resources Group (IRG) on conservation and natural resource management projects in various countries, managing long-term projects in Indonesia and Egypt. Dr. Tarrant has worked in a number of countries in South and Southeast Asia, Eastern Europe, and in the Russian Federation and Ethiopia. He is professionally proficient in Bahasa Indonesia and fair in Arabic, Amharic, Spanish and French.

**George Taylor, IRG Senior Manager and EPIQ II Senior Policy Advisor.** Mr. Taylor is a recognized environmental expert with 25 years of experience in international development worldwide. His areas of expertise include program conceptualization, design and management; forestry and natural resource management; agricultural and rural development; donor coordination; environmental policy and planning; institutional governance building; and strengthening civil society. He served at USAID for more than 20 years, working throughout Africa, Asia, and Latin America in environment, agriculture, and rural development. Mr. Taylor has had long-term overseas assignments in Bolivia, Mali, Nepal, and Niger. He is recognized throughout the USAID community as a dedicated, results-oriented manager with proven planning, analytical and team management abilities. Since joining IRG, Mr. Taylor has undertaken assignments in Namibia and Mexico, and served as a Senior Policy Advisor under

the EPIQ I IQC contract. He holds an MS in International Forestry and Forestry Resource Management and Policy from the State University of New York.

#### **IRG SUBCONTRACTORS:**

**Academy for Educational Development (AED)** offers expertise in communication and education tools for water conservation, community based forest management, coastal resource management, biodiversity conservation, ecotourism, air pollution, global climate change, and solid waste management.

**Center for International Environmental Law (CIEL)** offers expertise to strengthen legal frameworks and institutions for environmental management; addressing international trade and environmental issues; monitoring negotiations of multilateral environmental agreements; and supporting development of national laws and policies to implement them.

**Center for Sustainable Development in the Americas (CSDA)** offers expertise in the development of national climate change institutions, emission reduction quantification, baseline determination, and training.

**Development Alternatives, Inc. (DAI)** is an international consulting firm that provides technical assistance to programs, projects and institutions in developing countries. Throughout its 28-year history, DAI has successfully conducted short-term studies and evaluations, identified and designed technical assistance activities, and implemented multi-year projects. DAI's corporate capabilities include: bank and business training; community development; economic planning and reform; enterprise development; financial services; land use planning and management; market research and development; natural resources management; privatization services; public and private sector policy analysis; public sector management; soil and water conservation; trade, investment and export promotion; water resources management.

**Development InfoStructure (devIS)** offers expertise in building, hosting, and maintaining web sites; installing, developing applications for, and training in the use of management information systems for USAID, UNICEF, UNDP, the World Bank, the Department of State, private consulting firms, and NGOs.

**ECODIT** offers expertise in solid and hazardous waste management, water/wastewater services, industrial pollution prevention and control, EIAs, and environmental emergency response.

**Management Systems International (MSI)** offers expertise in strategic planning; institutional/organizational development and training; monitoring and evaluation, and implementing policy change.

**Michigan State University (MSU)** offers expertise in agricultural and natural resources development, including creating incentives for adoption of environmental technologies in agriculture; developing and evaluating policy instruments for controlling non-point sources of water pollution, particularly from agriculture; community based natural resource management; institutional and human capacity building; analysis of the human dimension of GCC-related changes in land use and cover; and conducting international field research in gender, justice, and the environment.

**Montgomery Watson Harza (MWH)** offers expertise in environmental engineering services including water supply, wastewater management, watershed management, river basin planning, hydroelectric power generation, and solid and hazardous waste management.

**Tellus Institute** offers expertise in building and using decision-support tools, especially for evaluating alternative development scenarios for global, regional, and national applications, and for assessing technical and policy options for greenhouse gas mitigation. Tellus also has expertise in EIA and Regulation 216 training.

**The Nature Conservancy (TNC)** offers expertise in tools to encourage land protection – easements, private reserves, land trusts, and finance tools, e.g., trust funds; linking environment and economic growth through programs and policies that motivate people to manage resources sustainably by capitalizing on their market value – via ecotourism management planning, visitor use fees for protected areas, and alliances with the tourism industry to work on environmental impact issues.

**Urban Institute (UI)** has more than 20 years of experience in providing technical assistance to improve the efficiency and responsiveness of local government agencies in the U.S. and abroad. UI has provided technical expertise in the financing and delivery of urban services, including strengthening of institutional arrangements for regulating and monitoring private firms partnering with government to provide such services. UI also has expertise in mobilizing community participation in infrastructure projects, and analyzing municipal credit markets.

**Training Resources Group, Inc. (TRG)** has worldwide experience in the design and delivery of participatory training for local officials, managers, and stakeholders, and in conference facilitation.

**Winrock International (WI)** offers expertise in managing environmental policy support programs, measuring industrial environmental performance, and analyzing water resource supply and allocation issues.

**World Resources Institute (WRI)** offers expertise in environmental policy analysis, especially in the areas of biodiversity conservation, agriculture and environment linkages, and other global environmental issues, including Global Climate Change. WRI works with partner institutions around the world, thereby providing broad access to policy analysis capacity.

3. **PRIME CONTRACTOR: PA GOVERNMENT SERVICES (PA)**  
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**PA Government Services Inc.** and its EPIQ partners serve governments and international development organizations in the Americas, Europe, Asia, and Africa to improve public infrastructure and environmental services. Team experts provide technical support for public policy analysis, dialogue, implementation and monitoring for environment and natural resources with particular strengths in electricity, oil & gas, water, travel and tourism, transportation and network industries. Our work links environmental management and infrastructure to economic goals through sector restructuring, energy and water-use efficiency, market and survey research, and natural resource management and information technology. The PA EPIQ team offers broad expertise and in-depth experience in formulating government strategies and plans, developing regulatory and pricing frameworks for the environment and natural resources, and establishing public/private partnerships to foster environmentally sustainable development, including the support and expansion of clean production methods.

**SENIOR STAFF:**

**Kenneth Rubin, IQC Manager**, directs PA's Infrastructure and Development Services Practice comprised of 350 staff working in the energy, water, environment, and tourism sectors in more than 50 countries worldwide. Dr. Rubin has 30 years of experience in environmental engineering, policy, economics, and finance. Focusing on water resources management, Dr. Rubin has broad experience formulating and evaluating alternative policies and programs in air quality, water quality, solid waste management, industrial waste management, and environmental enforcement. His most recent work adapts the strengths of both environmental regulatory and market-based approaches to meet environmental policy objectives of host countries. Dr. Rubin has developed and implemented environmental management systems for individual industries, municipalities, and entire countries. He has worked in, and trained environmental professionals across, the Americas, Central and Southeast Asia, China, the Middle East, and North Africa. Dr. Rubin has both a PhD and MS in Environmental Systems Engineering from Harvard University, an MS in Public Health from the University of North Carolina at Chapel Hill, and a BS in Civil and Environmental Engineering from Cornell University.

**Mark Oven, Acting Deputy IQC Manager**, is an expert in energy and environmental technologies, and their applications in the commercial and industrial sectors, as part of cleaner production programs. He has supervised or reviewed hundreds of energy and cleaner production audits, and has supported cleaner production centers in Bolivia, Peru, Mexico and Central America. He has also worked in various environmental and energy policy efforts, including design and implementation of municipal EMS projects, voluntary environmental certification programs and sustainable development programs. His focus on implementation has resulted in extensive work with local consultants and institutions, in more than 20 developing countries

around the world. He has also designed and executed training courses and workshops in a variety of energy and environmental topics.

**John Armstrong, Senior Policy Advisor**, has over 25 years experience in U.S. and developing country energy policy, program design and implementation, focusing in particular on energy efficiency, renewable energy and climate change. . Areas of expertise include national energy efficiency program design, market transformation, climate change strategy, energy efficiency law, institutional organization and development, building energy codes, and large-scale project management. In addition to serving as project manager for USAID's energy sector indefinite quantity contract and its predecessor, Mr. Armstrong has done recent work to improve the performance of the Bangladesh energy sector and to mitigate climate change in the Philippines, and earlier led a climate change outreach and awareness project in India. He was resident chief of party for the development of Pakistan's national energy conservation center and earlier was director of energy conservation and development at the Minnesota Department of Energy and Economic Development, as well as director of the Wisconsin Office of Energy.

**Jack Schramm, Senior Policy Advisor**, has over 30 years of experience in environmental policy development and implementation at high levels of government and industry. His expertise includes environmental policy and legal analysis; formulation of integrated market-based and command systems of environmental management; institutional assessment and strengthening; urban environmental management; formulation of environmental laws and regulations; compliance assessment and programs; ISO 14001 certification assistance; institutional decision-making; program design and management in all media; environmental training; and environmental impact assessment analysis. Mr. Schramm is a former Regional Administrator for the U.S. Environmental Protection Agency, Region III (Philadelphia). He holds a JD from the Washington University School of Law, and a BA from Colgate University.

**Chris Howell, Senior Policy Advisor**, has over 25 years of experience in economic and environmental assessment, institutional governance and capacity building, and strategic planning. He has specific recent work in carrying institutional governance analysis, tourism planning and watershed management. Dr. Howell is well known for his work in coastal zone management as well as integrated water and related land resources planning and management, especially in tropical and sub-tropical and stressed ecosystems. Dr. Howell serves as a consultant to private sector clients, NGOs, international agencies and international governments in the US, Caribbean, Australia and the Middle East. He has a PhD (University of Florida) and MS (University of London) in Geography and a BS in Economics from the University of London.

## **SUBCONTRACTORS:**

**DevTech Systems, Inc.** is a consulting firm specializing in fostering environmentally sound, equitable policies in developing and transitional countries throughout the world. Founded in 1984, DevTech's work emphasizes economic and human capacity development while maintaining and enhancing the natural resource base. For more information, please see [www.devtechsys.com](http://www.devtechsys.com).

**The Duke Center for International Development (DCID)** is a multidisciplinary center in Terry Sanford Institute of Public Policy at Duke University. DCID specializes in teaching, research, executive education and advisory services focusing on a broad range of policy issues facing the developing world. DCID provides a mechanism for collaboration among scholars, professionals, practitioners and technical experts within a university environment." [www.pubpol.duke.edu/centers/cidr/index.php](http://www.pubpol.duke.edu/centers/cidr/index.php)

**Environmental Law Institute (ELI):** For three decades, ELI has played a pivotal role in shaping environmental law, policy and management as an internationally recognized, independent research and education center. ELI improves framework laws and provides training and support to citizens' organizations, government officials, environmental managers, communities, and indigenous peoples, working with partners in Africa, India, Latin America, and the Middle East, to achieve sustainable development. [www.eli.org](http://www.eli.org)

**The Kenan Institute of Private Enterprise**, part of The University of North Carolina's Kenan-Flagler Business School, works to foster social and economic development by leveraging private sector resources to serve the public interest worldwide. The Institute's Washington Center works at the intersection of international business and international development, partnering with corporations to build the development rationale for trade, improve community involvement programming, and promote market-led growth in developing countries. For more information visit [www.kenaninstitute.unc.edu](http://www.kenaninstitute.unc.edu).

**Resources for the Future (RFF)** is a nonprofit and nonpartisan think tank that employs social science research methods to analyze energy policy, land and water use, hazardous waste, space technology, environmental law and institutions, and biodiversity issues. [www.rff.org](http://www.rff.org)

**Research Triangle Institute (RTI)** is an independent research institute that serves government and industry clients in the United States and abroad, with its staff of approximately 2,500. RTI conducts research and provides technical assistance and training in public health, environmental management, governance, education, advanced technologies, and public policy. RTI was established in 1958 as the initial research and development (R&D) center in the Research Triangle Park, in North Carolina. [www.rti.org](http://www.rti.org)

**The South-East Consortium for International Development (SECID)** is a not-for-profit 501 (c) 3 organization established in 1977 by U.S. land grant universities to provide research, training, and outreach to developing countries. Its corporate mission is to assist less developed countries to reduce poverty, and improve their standards of living and economic potential through the implementation of educationally and scientifically sound and sustainable

development initiatives. Information on SECID and its programs can be found at [www.secid.org](http://www.secid.org).

**Technical Systems International Inc. (TSI)**, a small 8(a) SBA certified company, was founded in 1997 to provide consulting services in environmental and energy areas for public and private entities. Over time, TSI's consulting services have diversified to cater the needs of its national and international clients for consulting services and development of training programs and capacity building. Please see [www.tsiint.com](http://www.tsiint.com).