***Request for Proposal (RFP)***

***USAID JORDAN LOCAL ENTERPRISE SUPPORT PROJECT (LENS)***

***MICROFUND FOR WOMEN (MFW) – GREEN ENERGY- Phase 2***

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| **RFP #** | **12112017** |
| **Issue Date:** | **11 December 2017** |
| **Questions Deadline:** | **18 December 2017**   * Submission of questions or requests for clarification in writing via email to [**RFP@jordanlens.org**](mailto:RFP@jordanlens.org)**,** subject line: “RFP12112017 – Micro fund for Women (MFW) – Green Energy-Phase 2”,by **15:00 Hours local time in Jordan** * Please note that inquiries and answers to inquiries will be shared with all registered Offerors. * Please do not contact any USAID Jordan LENS employees regarding this RFP. **Contacting individual employees shall be cause for disqualification.** * **NO TELEPHONE INQUIRIES WILL BE ANSWERED.** |
| **Answers to be shared:** | **21 December 2017**  Questions received and Answers will be published on the project website, under the solicitation link by 17:00 Hours local time in Jordan on the specified date:  <http://jordanlens.org/work-with-us/solicitations> |
| **Offer Submission Deadline:** | **10 January 2018**  Proposals (including technical proposal and budget) are due by **15:00 Hours local time in Jordan** via email to[**RFP@jordanlens.org**](mailto:RFP@jordanlens.org). Emailed submissions must contain the subject line “RFP12112017 – Micro fund for Women (MFW) – Green Energy-Phase 2”,  Proposals received after the deadline will not be considered. |
| **Anticipated Award Type:** | Fixed Price Award |
| **Expected Award:** | March 2018 |
| **Expected Delivery:** | March 2018 – September 2018 |
| **List of Acronyms** | RFP Request for Proposal  LENS Local Enterprise Support  MSE Micro and Small Enterprises  MFW Microfund for Women  FHI360 Family Health International  MEPS Minimum Energy Performance Standards  SWH Solar Water Heaters  GWh/yr Gigawatt per year  EE Energy Efficiency  MFIs Microfinance Institutions  GDP Gross Domestic Product  GNP Gross National Product  GHG Green House Gasses  NEEAP National Energy Strategy and National Energy Efficiency Action Plan  JREEEF The Jordan Renewable Energy and Energy Efficiency Fund  MIS Management Information System |

1. **PROGRAM BACKGROUND**

The USAID Jordan Local Enterprise Support Project (USAID LENS) is a five-year project funded by the United States Agency for International Development (USAID), Award No. AID-278-LA-14-00001, to encourage the long-term sustainable economic growth of underserved Jordanian communities.

Microfund for Women (MFW) is a not-for-profit organization registered under the Ministry of Trade and Finance, dedicated to empowering the entrepreneurial poor, especially women, to transform their lives through their own economic activities. MFW seeks to dismantle the obstacles that prevent women from creating their own success and building better lives for their families by providing collateral-free loans to start or strengthen their own businesses. These businesses, though typically very small, enable borrowers to accumulate assets, create jobs for others and work their way out of poverty.

Jordan is accelerating the implementation of programs and policies that ensure the diversification of energy sources, with a focus on alternative and renewable sources, along with supportive programs that increase efficiency in energy use and consumption. The current situation of scarce energy resources and the growing need of energy for social and economic empowerment have placed a heavy burden on the country according to international standards.

The projects and programs being implemented in Jordan are intended to reduce energy consumption by 20% by 2020, in accordance with the National Energy Strategy and the National Energy Efficiency Action Plan Several measures are being applied, such as: establishing minimum energy performance standards (MEPS) and labels for buildings by authorities; replacing 1.5 million incandescent lamps with energy efficient lamps; adopting Energy Label Program; installing 30,000 Solar Water Heaters in addition to 5,162 SWHs; implementing a two-phase program with a total cost of $43 million and a 60 GWh/yr projected saving for electricity used in Water Pumping; and working on EE-related policies, etc. NGOs, Institutions and agencies have been working side by side with governmental authorities and institutions to promote efficiency in energy use and consumption as well as to raise awareness.

Micro Finance Institutions (MFIs) in Jordan can play an important role in responding to this challenge – whether directly through financing the access to energy resources, or indirectly through playing an active role in raising awareness. However, most MFIs in Jordan lack green measures in their own policies. Thus far, few actions have been taken for supporting small enterprises and vulnerable low-income communities to access energy and renewable energy systems/sources. This segment of the community is not reducing its energy use nor increasing efficiency in part because they lack adequate financing and/or the awareness of the issue itself.

MFW is aware that access to energy is a driver of economic development and improved living conditions. MFW believes that green energy represents a market-based opportunity for growth and development for disadvantaged communities, small enterprises, and the sector itself. MFIs can contribute to efficient energy use, assist in providing energy from renewable resources, reduce energy and other household expenses, increase net income, and permit savings. The keys to having a successful plan for energy microfinance lies in understanding the energy needs of the targeted segment, carefully designing the right products and services, and building partnerships that involve technical experts and the private sector, including manufacturers of green energy products.

The development of green energy products and services is expected to provide a positive quadruple bottom line effect for the Jordanian Microfinance Industry, the Jordanian Economy, Household Energy Consumption Patterns, and the Environment as follows:

1. Financial Inclusion: Microfinance as an economic mechanism will help make those green products and services available for the un-bankable and vulnerable communities. Consequently, it is anticipated that these green products/services would increase MFW’s market share within the microfinance industry with increased Gross Loan Portfolio and Number of Active Clients, thereby leading to enhanced financial inclusion.
2. Economic Development: Increased green technology production and adoption will reduce fossil fuel imports and create local green jobs to meet growing demand[[1]](#footnote-2), thus contributing to Jordan’s Gross Domestic Product (GDP), and Gross National Income (GNP). Moreover, a greener economy contributes to the creation and support of green jobs[[2]](#footnote-3).
3. Household Energy Consumption Patterns; A more Systemized-Optimized Energy Consumption trend, thus reducing electricity/energy bills for households through the adoption of green, clean, and smart energy technologies. The difference between previous and current energy bills (saved/recovered costs) represents a new source of income for MSEs and households.
4. Social & Environmental Sustainability: Green Microfinance is a relatively nascent-uninvestigated market, but seeks to attain a positive social, and environmental impact. Impact includes reducing dependency on fossil fuels, reducing Green House Gases (GHG), in order to mitigate the effects of global warming. Moreover, green energy will also aid in attaining the objectives of The National Climate Change Policy of the Hashemite Kingdom of Jordan 2013-2020, The National Energy Strategy and National Energy Efficiency Action Plan (NEEAP), The Renewable Energy and Energy Efficiency Law (which aims at promoting private sector investment in renewable energy projects), and The Jordan Renewable Energy and Energy Efficiency Fund (JREEEF).

USAID LENS has recently funded a specialized green energy consultancy firm to assess residential and commercial energy needs among MFW’s target markets and to determine the viability of developing a product or service to meet these needs, as well as an analysis of current competition and potential partners. Outcomes of this assessment included:

1. Identified potential green energy partners in the country
2. Identified gaps and areas of development in MFW’s policies, procedures, guidelines, and strategy
3. Assessed residential energy needs among MFW’s target markets
4. Assessed the viability of developing a green product or service that could meet those needs

The selected vendor will be provided with a copy of the reports developed during the Assessment phase (Phase I).

1. **PURPOSE STATEMENT**

FHI 360, on behalf of USAID LENS is seeking to solicit proposals from interested, qualified and eligible bidders to support Microfund for Women’s (MFW) Green Energy Initiative. This RFP is to seek offers to implement Phase II of this initiative, which will build upon an assessment done in Phase I. The selected vendor will be provided with a copy of the Assessment Report completed in Phase I. Through this RFP, FHI360 is seeking a qualified consultancy firm to provide technical assistance services to MFW to:

1. Develop an ideal mix of a green financial product, service and related non-financial services. Development of a product and a service should include:

* Idea Identification of a new financial green energy credit product (i.e. financial loan), or the adjustment of a pre-existing credit loan
* Idea Identification of a Green Energy Financial service (non-credit solution/innovation);
* Building supporting relationship and partnership with required stakeholders, vendors, suppliers, and governmental entities to support the development of innovative product and a service
* Development of a financial product and a service following a comprehensive agile methodology.
* Development of the financial product and service accompanied with a detailed plan for non-financial services (i.e. Awareness, renewable energy capacity building/training, or EE kit, etc.).

1. Capacity Building of MFW and its beneficiaries in Green Energy and the development of a product and service. Training will be dedicated to:

* MFW’s staff (LOs, Branch and Marketing Department staff, etc.), including training to better understand the value of Green Energy, promote/sell the green product by understanding of electricity savings attained, lowering energy consumption through smart/efficient technology, etc.
* MFW’s green loan beneficiaries/recipients, including training focused on the required long-term maintenance for green energy products, such as training on proper disposal of photovoltaic batteries, cleaning certain parts of solar panels, best practices to save energy, etc.

1. Design and launch a targeted awareness campaign that will encourage MFW’s clients and non-clients to seek loans and other products to finance purchases of green products and technologies. This will target all of MFW’s client base, including individuals, Groups, and SMEs (households or businesses).

This RFP is issued as a public notice to ensure that all interested, qualified and eligible organizations available to work in Jordan **that fulfill USAID-designated Geo Code 937** have a fair opportunity to submit proposals. For more details, refer to the Scope of Work section below.

Geo Code 937 is defined to include Jordan, the United States, and other developing countries[[3]](#footnote-4).

The USAID LENS Project anticipates awarding a fixed price award for the implementation of this activity with an estimated cost not exceeding 100,000 JOD. Revealing the estimated cost ceiling does not mean Offeror should strive to meet this maximum amount. Offerors must propose costs they believe are realistic and reasonable for the work.

1. **SCOPE OF WORK/TASKS**

The selected firm for Phase II will need to incorporate and review the findings concluded through the Green Energy Assessment of Phase 1 into their product development model and awareness campaign design. The firm will work closely with the MFW Business Development Supervisor and other team members as required to ensure the successful delivery of the project within a specified timeframe.

The winning firm will provide technical assistance services to MFW to achieve the following:

1. Develop and deploy a ***Green Energy Financial Product(s) (credit) and Non-Financial Services***, including training for MFW’s existing and potentially new clients/beneficiaries, MFW’s staff, and the green energy vendor(s)) involved in the credit product. This is intended to improve access to renewable energy and clean and efficient technologies for small enterprises and underserved population. Development of a product and/or a service should include:

* Idea Identification of the product and the service
* Building supporting relationship and partnership with required stakeholders, vendors, suppliers, and governmental entities to support the development of innovative product and a service
* Development of the product and the service should be accompanied with a detailed plan for non-financial services (if deemed strategic and viable by the parties).

2 Capacity Building of MFW and its beneficiaries in Green Energy and the developed product and service. Training will be dedicated to:

* MFW’s sales staff (LOs, Branch managers and Market Department), including training to better understand the value of Green Energy, promote/sell the green product by understanding of electricity savings attained, lowering energy consumption through smart/efficient technology, etc.
* MFW’s green loan beneficiaries/recipients, including training focused on the required long-term maintenance for green energy products, such as training on proper disposal of photovoltaic batteries, cleaning certain parts of solar panels, best practices to save energy, etc.

3. Design and launch a targeted ***Awareness Campaign on the financial, social, and environmental merits of green energy technologies*** in order to generate demand for new green energy lending products in a targeted Marketing Campaign. The Awareness Campaign will focus on conveying knowledge pertaining to green energy equipment, energy sustainability, energy savings, cost of renewable energy, long term green investment, green technology maintenance, green microfinance, cash flow management, climate change mitigation and adaptation, and environmental risk assessments. The Awareness Campaign will be designed and launched as an integral component of the Marketing Campaign for the green energy products, and is to generate demand for the new products.

The selection of green energy products will be designed and marketed without implying any offer of consumption loans. MFW will not provide consumption loans in its portfolio of products.

A list of anticipated Tasks and Deliverables for this Scope of Work are outlined in the table below. The bidders are invited to present and justify their own proposed Tasks, Deliverables and timeline.

| NO. | TASKS | DELIVERABLES |
| --- | --- | --- |
|  | Incorporate and review the findings of the Green Energy Assessment (Phase I). | Submission of Report #1 (Kick-off plan/report) deliverables:   1. Submission of Project detailed work plan 2. Review the outcomes of the assessment and discuss with MFW the targeted clients of this new product/service, including location, age, gender, disposable income, tendency to borrow, etc. Determine how many clients does MFW anticipate to benefit from the new product/service, where are those clients located, etc. 3. Analyze MFW’s institutional capacity to undertake green energy product development. |
|  | Idea Identification of product and service | * 1. Conduct discussions and brainstorming session with MFW staff and clients, and stakeholders to enable a proper identification of the product and the service ideas.   2. Determine the initial characteristics of this financial product/service, including amount of loan, interest rate, environmental risk assessment required, tenor, and collateral required.   3. Analyze MFW’s institutional capacity to undertake the identified green energy product development   4. Conduct FGD to test the need/ value of the proposed product and service and to assist in initially identify the features of the product and the service. |
|  | Design a Product Prototype that is based on the findings from the Assessment and designed in cooperation with MFW product team members. | Submission of Report # 2 (point 3), deliverables:   1. Further define and design the initial green energy product/service. 2. Plan/allocate the required staff and logistic resources from MFW. 3. Conduct and synthesize cost/revenue analysis as well as sensitivity analysis to develop financial projections. 4. Verify legal compliance of product, such as consistency with laws and regulations from the Ministry of Energy. 5. Enhance the product design and transform it into a consistent, replicable prototype. 6. Hand over final prototype to the pilot team for testing. 7. Design the preliminary marketing strategy, consisting of the marketing campaign framework, printing and disseminating brochures, advertisements, etc. |
|  | Identify at least 2 strategic suppliers of green equipment and negotiate discounts, targets, financial and non-financial services that could be offered, i.e., maintenance and financial training. | Submission of Report #3 (point 4), deliverables:   1. Identify Pilot Stakeholders, including green energy vendors, MFW’s team, winning firms team, and define Roles & Responsibilities. 2. Draft agreement with at least 2 potential suppliers/ vendors/ partners. |
|  | Assess Risks and Rewards in order to convert the product prototype into a Product Plan. A basic set of financial projections will be produced for both the pilot and rollout phases and included in the Product Plan. | Submission of Report # 4 (point 5), deliverables:   1. Submit Risk/Reward Assessment 2. Submit financial projections for pilot/rollout |
|  | Develop Monitoring and Evaluation Plan. | Submission of Report # 5 (point 6) M&E framework plan. |
|  | Pilot Preparation: Finalize the Product Plan that identifies all other resource requirements, and establishes budgets and plans for the pilot launch. | Submission of Report #6(point 7), deliverables:   1. Draft the Product Plan. 2. Compose the pilot implementation plan (Piloting Protocol) 3. Identify and confirm the pilot group (pilot participants and pilot technical monitoring and execution team), in addition to the required representation from MFW’s side, the winning bidder, and potential green energy vendors/partners. 4. Define the key financial and non-financial objectives to be captured and evaluated during pilot test. 5. Establish the pilot-testing framework through the pilot test protocol, i.e., branch location, demographics, sample size, duration and timing, monitoring and evaluation, etc. 6. Record, monitor, evaluate, and tweak product based on pilot test results. 7. Document outcomes of the pilot test, compare with original projections, lessons learned, training material designed, marketing strategy adopted, and preliminary plans for product roll out. |
|  | Final Pilot Design: Conduct a Kick-off meeting to discuss the pilot requirements & engage stakeholders with the next steps | Submission of Report #7 (point 9), deliverables:   1. Identify the adequate/viable green vendors and their corresponding products/services. 2. Identify the required tasks for pilot execution, i.e., timeframe, and who is responsible for what. 3. Define the test scope and if a contingency plan is in place in case a test scenario fails. 4. Determine the number of pilots necessary, the location of each pilot, and duration for each pilot test. 5. Test MFW’s MIS system prior to pilot execution to make sure results and data can be tracked and captured. |
|  | Pilot Alignment: Based on outcomes of the kick off meeting, the pilot might need further alignment geared towards MFW’s vision with its green partners. | Submission of Report #8 (point 9), deliverables:   1. Hold a workshop to align certain risk mitigation measures recommended by MFW’s Risk Management Department to this product. 2. Hold a workshop to determine how capacity building (for staff and clients) for this new green product/service will be delivered through the MFW’s Learning Academy. 3. Hold a workshop to structure the reporting of green financial products/services to MFW’s Knowledge Management System (KMS). 4. Determine in collaboration with the Ministry of Energy and JREEEF (and any other related party) on the technical requirements necessary for appliances to be classified as a “Green Energy” product. This will also consist of any legal/contractual steps required by MFW and the client to register, acquire, and exploit this green product/service. |
|  | Conduct trainings to MFW staff | * 1. Develop Training manuals   2. Conduct trainings   3. Develop sustainability plan for trainings related to the product and the service |
|  | Pilot Launch/Execution: | Submission of Report #9(point 10), deliverables:   * 1. Execute the pilot.   2. Document the entire pilot workflow progress, test case results, outcomes, and KPIs.   3. Closing of pilot. |
|  | Pilot Evaluation: | Submission of Report #10 (point 11), deliverables:   * 1. Design and release the pilot survey.   2. Analyze survey results.   3. Review lessons learned from the first pilot for MFW’s staff and clients, possibly through MFW’s Learning Academy if ready.   4. Hold a workshop to discuss the lessons learned from the pilots and the survey. This will incorporate international best practices, product tweaking, training, etc.   5. Tweak the green energy product/service based on outcomes from the 1st pilot   6. Once lessons learned are identified and product characteristics are tweaked, a network of relevant/adequate green energy partner(s) can be identified and selected. At that point, the winning firm in collaboration with MFW should identify a suitable/viable green energy party (parties), and establish partnerships with institutions, i.e., The Jordan Renewable Energy and Energy Efficiency Fund (JREEEF), National Energy Strategy and National Energy Efficiency Action Plan (NEEAP), Jordanian Renewable Energy Society (JRES), and the National Center for Research and development \Energy Research Program, Philadelphia Solar, Smart Buy, Samsung Levant. |
|  | Develop Marketing Plan to prepare MFW for delivery strategies for the product and/or begin the marketing strategy to different client segments. | Submission of Reports #11 (point 12) deliverables:   1. Draft a Marketing Plan that includes the marketing objectives. 2. Survey MFW’s clients (and non-clients) to understand messages that resonate and demand for product. 3. Support MFW in defining and determining the budget needed for the marketing campaign. 4. Determine optimal communication/media channels to be exploited. 5. Design a simple and comprehendible message through ads, brochures, banners, etc. 6. Launch the marketing campaign. 7. Monitor and evaluate the impact of the campaign. |
|  | Develop and launch the Awareness and Capacity Building campaign for internal MFW teams and partners to prepare for roll out and marketing. | Submission of Reports #12(point 14), deliverables:   1. Awareness Campaign Plan and Capacity Building Plan for its implementation. 2. Determine how to identify suitable/ideal clients for the green energy product/service based on outcomes from the 1st pilot. 3. Determine how to promote the product/service and explain its financial and technical characteristics This includes merits of switching to green energy, quantifying JOD savings attained from green technology, international best practices, and any other related material. 4. Present and develop a training and capacity building workshop which will be held to prepare for the marketing campaign and roll-out |
|  | Adapt MFW’s Management Information System (MIS) with institution input and based on product criteria, test the MIS system prior to pilot execution | Submission of Reports #13 (point 15), deliverables:   1. Set of recommendation for adjustments of the MIS and internal procedures |
|  | Conduct Internal Testing and Training to test the adequacy of the internal systems developed for the product. | Submission of Report #14 (point 16), deliverables:   1. Enhance/develop staff skills required to apply these the tools in the field through selecting and training key MFW personnel to provide training on Green financial and non-financial products to additional credit officers in the future. 2. Provide preliminary guidance pertaining to product’s objectives, characteristics, targeted demographics, etc. 3. Build/solidify support between the pilot team, the green energy vendors, and MFW’s product development team. 4. Develop the anticipated processes, workflows, and tools necessary for deploying this new green energy product/service. |
|  | Prepare for the pilot rollout with all MFW departments. | Submission of Reports #15 (Point 17), deliverables:   1. Outcomes and recommendations of pilot roll out. 2. Prepare for pilot test, draft MFW’s internal policy manuals, develop the awareness/marketing campaign material, provide staff/client training etc. |
|  | Roll out of product though introduction and integration of the new product into the overall marketing and competitive strategy of MFW. | Submission of Report #16 (point 18), deliverables:   1. Administer and manage the transfer of the new Green Energy product/service prototype into MFW’s operations. 2. Identify the financial and non-financial objectives to be captured and monitored during roll out. 3. Identify and determine the target roll out parameters, i.e., proposed schedule, progress tracking, required processes, roll out branches. 4. Prepare resources for product roll out, prepare final product/service manuals, train staff, develop the marketing material, etc. 5. Monitor and evaluate roll out product processes, progress, and outcomes. 6. Make all necessary adjustments to the product and to the green energy partners. 7. Draft/update MFW’s internal manuals to be a green friendly institution, including procedures, guidelines, regulations, approvals, etc. disbursements, etc. |
|  | Closing Meeting and Final Report | Submission of Report #17 (point 19), deliverables:   1. Roll out plan and recommendations. 2. Final Report on the final product. |

1. **DELIVERABLES**

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| --- | --- |
| **No.** | **Anticipated Reports and Deliverables** |
| **1** | Submission of Reports #1: Kick-off plan |
| **2** | Submission of Reports #2: Design a Product Prototype |
| **3** | Submission of Reports #3: Identify 2 strategic suppliers and draft 2 agreements |
| **4** | Submission of Reports #4: Risk/Reward Assessment and financial projections |
| **5** | Submission of Reports #5: M&E Pilot Plan |
| **6** | Submission of Reports #6: Product Plan |
| **7** | Submission of Reports #7: Final Pilot Design |
| **8** | Submission of Reports #8: Pilot Alignment |
| **9** | Submission of Reports #9:  Pilot Execution |
| **10** | Submission of Reports #10:  Pilot Evaluation |
| **11** | Submission of Reports #11  Develop marketing plan (outreach and marketing strategies) |
| **12** | Submission of Reports #12  Develop and launch the Awareness and Capacity Building campaign |
| **13** | Submission of Reports #13  Adapt MFW’s Management Information System (MIS) |
| **14** | Submission of Reports #14  Internal Testing and Training |
| **15** | Submission of Reports #15  Pilot rollout Preparation |
| **16** | Submission of Reports #16  Product Roll Out and Initial M&E |
| **17** | Submission of Final Report #17  Project Closing, Power Point presentation. |

\*: all written deliverables are to be submitted in English unless indicated otherwise.

\*\*:the bidder is requested to present a detailed timeline. The Project is expected to be completed within 7 months from the awarding date.

# MONITORING AND EVALUATION (M&E) PLAN

The below table depicts the anticipated impact for phase 2 of the Green Energy intervention (product development and marketing):

|  |  |
| --- | --- |
| **A2F Indicators** | **MfW’s Green Energy Product Proposed Attribution** |
| Increase in the # of MSE clients | 350 |
| # new MFI products | 1 |
| # women owned businesses financed | 100 |
| Volume loans disbursed | USD 1 Million |

# SUBMISSION INSTRUCTIONS

This section contains general and specific requirements for submitting the technical and cost proposals. Please ensure completed forms, including the Evidence of Responsibility and Independent Price Determination, along with a copy of your legal registration, are included with the technical proposal otherwise your proposal will be rejected.

1. This RFP is issued as a public notice to ensure that all interested, qualified and eligible organizations available to work in Jordan that fulfill USAID-designated Geo Code 937 country (meaning Jordan, the US and other developing countries[[4]](#footnote-5)) have a fair opportunity to submit proposals. Organizations must have a successful track record of similar projects. All staff involved must be fluent in both Arabic and English languages. If the Offeror includes a group of firms and/or subcontractors, one lead organization or firm must be clearly identified and is responsible for handling all reporting and coordination with USAID LENS and MFW. **All firms and/or subcontractors must fulfill USAID-designated Geo Code 937 country requirements.**
2. The Offeror is requested to submit a proposal directly responsive to the tasks, terms, and conditions of this RFP. The overall proposal shall consist of two (2) physically separated parts: Technical Proposal and Cost Proposal. Technical Proposals shall not make reference to cost or pricing details.

Alternative proposals will not be considered. Proposals not conforming to this solicitation may be categorized as unacceptable and eliminated from further consideration.

Offerors are allowed to submit one proposal. If an Offeror participates in more than one proposal, all proposals involving the Offeror will be rejected.

1. Proposals shall be written in English. Cost proposals from Jordanian offerors shall be presented in Jordan Dinar. Cost proposals from US or other Geo Code 937 qualified Offerors shall be presented in US Dollar.
2. Proposals must remain valid for a minimum of **ninety (90) days**. The Offeror must submit its proposal by the following means:

* Electronically - Internet email attachments compatible with MS WORD, Excel, and Adobe Acrobat in a MS Windows environment to: [RFP@jordanLENS.org](mailto:RFP@jordanLENS.org)

1. The person signing the Offeror’s proposal must have the authority to commit the Offeror to all the provisions of the Offeror’s proposal.
2. The Offeror shall submit its best proposal initially as FHI 360 intends to evaluate proposals and make an award without discussions. However, FHI 360 reserves the right to conduct discussions should FHI 360 deem it necessary.
3. Proposals must be clearly and concisely written and must describe and define the Offeror’s understanding and compliance with the requirements contained in the STATEMENT OF WORK/TASKS/ACTIVITIES. All pages must be sequentially numbered and identified with the name of the Offeror and the RFP number.

**PART A: TECHNICAL PROPOSAL**

The Technical Proposal shall be straightforward and concise describing how the Offeror intends to carry out and satisfy the TASKS/DELIVERABLES described above and in accordance with the proposed timeline. No contractual price information is to be included in the Offeror’s technical proposal in order that it will be evaluated strictly on its technical merit.

Technical proposals are **limited to 15 pages** in total. Pages in excess of **15 pages** will not be read or evaluated.

Detailed information should be presented only when required by specific RFP instructions. Items such as graphs, charts, tables may be used as appropriate but will be considered part of the page limitation. The Organizational Information, CVs of proposed personnel, bio-data sheets, and portfolio of prior work examples are not included in the page limitation. No material may be incorporated in the proposal by reference, attachment, appendix, etc. to circumvent the page limitation.

The technical proposal shall be formatted using the following sections:

1. **Organizational Information (not part of page limit):**
   * Organization’s legal name
   * Contact name and position or title
   * Organization’s E-mail address, physical address and telephone number
   * Evidence of Responsibility and Independent Price Certification Form (includes confirmation that firm is a USAID-designated Geo Code 937 country – meaning Jordan, the US, and other developing countries) – **Annex D**
   * Copy of legal registration documents authorizing organization to do business in Jordan
2. **Technical Approach – Narrative not to exceed 10 pages.**

The Offeror shall demonstrate its understanding, ability and overall approach to performing the requirements described in the Scope of Work/Tasks/Deliverables. The Offeror shall clearly explain how it proposes to structure, design, manage and execute the work required. The Technical Approach must include a timeline or Gantt chart of the deliverables required to execute the work.

1. **Past Performance – Narrative not to exceed 3 pages.**

The Offeror shall provide at least three (3) examples of past performance of successful experience implementing similar activities as being requested in this RFP. Experience should be in Jordan or the region. The past performance examples must be within the last three (3) years. The Offeror must provide references for each example, including the company or organization, name, title, phone number and email address of the reference so we may contact. Please use the Past Performance Reference Form template in **Annex F.**

1. **Personnel/Staffing – A narrative not to exceed 2 pages.**

A summary describing the proposed staff for the project. The summary shall include names, relevant qualifications of similar experience and the proposed role for each individual. The summary shall also include the percentage of staff time of principals and managers on this activity.

The Offeror must also include the CVs of key staff members involved in the Project. Each CV should not exceed two (2) pages. **Note:** CVs do not count towards the page limitation.

**PART B: COST PROPOSAL**

The Offeror shall propose costs it believes are **realistic** and **reasonable** for the work in accordance with the Offeror’s technical approach. The Offeror shall provide a complete budget based on cost elements described below using ***Annex A - Budget Template***.

The detailed cost proposal **shall be broken down by each task** (refer to Section IV. SCOPE OF WORK/TASKS/DELIVERABLES) and include the following:

* 1. Proposed staff, rates, number of person-days needed to accomplish the work.
  2. Transportation and logistics costs.
  3. Costs of workshops, meeting sessions with MFW staff and/or stakeholders and related materials, printed materials, supplies, etc.

Provide in the Budget Narrative section, using ***Annex B – Budget Narrative Template,*** a concise description and justification for each line item cost. Be sure to include data and/or methodologies to support cost estimates.

The budget narrative shall be presented in such a way as to be easily referenced from the budget and should provide sufficient information so that FHI 360 may review the proposed budget for reasonableness.

All projected costs must be in accordance with the organization’s standard practices and policies.

Offers including budget information determined to be unreasonable, incomplete, unnecessary for the completion of the proposed project or based on a methodology that is not adequately supported, may be deemed unacceptable.

Guidelines:

1. Cost proposals from Jordanian Offerors shall be presented in Jordan Dinar. Cost proposals from US or other Geo Code 937 qualified Offerors shall be presented in US Dollar.
2. Offer **must** indicate the inclusion/exclusion of any applicable taxes such as **VAT.**
3. **All costs must be budgeted as direct costs.  Indirect costs will not be accepted.**
4. If the Offeror proposes a fringe benefit rate on salaries, it must be supported by an established written policy. Please provide a detailed explanation in the budget narrative.
5. For employee salaries – List employee name (when identified), functional position and duration of assignment (in terms of person days), and daily rate. The daily rate is derived by dividing base annual salary exclusive of fringe benefits, incentives, bonuses, overtime, allowances and differentials by 260 days.
6. Offeror **must** include a signed biodata form (**Annex C**) for any proposed staff named in the budget.
7. Travel and Transportation – Provide the number of trips, origin and destination of trips, estimated air fares, and other costs such as taxi fees.
8. Per Diem – Offerors shall budget per diem associated with travel and transportation with their established written policy that shall not exceed the USAID Mission In-country Per Diem and Transportation Policy for USAID/Jordan Program Implementers and/or U.S. Department of State Standardized Regulations for per diem, which may be accessed electronically at the following internet address:

<http://aoprals.state.gov/web920/per_diem.asp>

1. Other Direct Costs – Itemize and provide complete details of other direct costs, including unit prices that may be incurred.

# EVALUATION CRITERIA

Bids must first meet the mandatory requirements before their technical proposals will be reviewed. Those bids not meeting the mandatory requirements will be automatically rejected.

The mandatory requirements are:

|  |  |  |
| --- | --- | --- |
|  | **MANDATORY REQUIREMENTS** | **MEETS REQUIREMENT** |
| 1. | Legally available to do business in Jordan – Offer shall provide a copy of its registration documents with the technical proposal. | YES/NO |
| 2. | Nationality of Offeror meets USAID Geographic Code 937 requirement – Offeror shall be registered in the US, Jordan or a USAID-designated 937 developing countries | YES/NO |
| 3. | Evidence of Responsibility and Independent Price Determination Form Completed – Offeror shall complete and submit the Evidence of Responsibility and Independent Price Determination Form with the technical proposal. | YES/NO |
| 4. | The detailed cost proposal follows the prescribed format. | YES/NO |

Bids satisfying the mandatory requirements will then be evaluated for technical strengths.

To be considered **technically qualified**, bids must score a minimum of **65 technical points** (out of 80 total technical points). Only those firms that are deemed technically qualified will have their cost proposals scored.

|  |  |  |
| --- | --- | --- |
| **Section** | **Description** | **Maximum Points** |
| **Technical Approach** | * Comprehensiveness of proposed approach. Clarity and appropriateness of proposed activity. (20 points) * Implementation plan and proposed timeline are realistic and include all proposed elements of activity. (15 points) | 35 |
| **Past Performance** | * Inclusion of at least 3 relevant past performance examples of similar activities in Jordan or the region. (15 points) * References provided by past clients for these examples and their evaluation of the Offeror’s ability to deliver on time and within quality and budget expectations. (15 points) | 30 |
| **Personnel/ Staffing** | * Qualifications and past relevant experience of staff proposed to perform the requirements of the scope of work. (15 points) | 15 |
| ***Technical Cut-off Range: bids must score a minimum of 65 technical points to be considered technically qualified and to have their cost proposals scored*** | | |
| **Cost Evaluation** | **Cost Proposal**   * Reasonableness of proposed budget based on scope of activities being proposed * Summary budget, detailed budget, and budget narrative included * Signed FHI 360 biodata forms included * Budget should be submitted in USD if offeror is based outside of Jordan; for offerors based in Jordan, budget should be submitted in Jordanian Dinar (JOD) with USD equivalent. * Follows budget template (see Annex A), indicates inclusion/exclusion of any applicable taxes. Total price will be evaluated by FHI 360. In evaluating the proposed budget, FHI 360’s concerns include determining whether:   + Proposed price reflects a clear understanding of the requirements stated in this RFP, and is consistent with the various elements of the Offeror’s proposal.   + Proposed price is reasonable in comparison with proposed prices received in response to the solicitation.   + Proposed price is reasonable in comparison with prices with FHI 360’s independent cost estimate. * Unrealistically low or high proposed prices, initially or subsequently, may be grounds for eliminating a proposal from competition either on the basis that the Offeror does not understand the requirement or the Offeror has provided an unrealistic proposal. | 20 |
| **Total Points** |  | 100 |

***NOTE:*** *FHI 360 will not compensate the company for its presentation of response to this RFP nor is the issuing of this RFP a guarantee that FHI 360 will award a subcontract.*

**COMPETITIVE RANGE** – If FHI 360 determines that discussions are necessary, FHI 360 may establish a Competitive Range composed of only the most highly rated proposals. FHI 360 may exclude an offer from the competitive range if it is so deficient as to essentially require a new technical proposal. FHI 360 may exclude an offer from the competitive range if it so unreasonably priced, in relation to more competitive offers, as to appear that there will be little or no chance of becoming competitive. FHI 360 may exclude an offer that would require extensive discussions, a complete re-write, or major revisions such as to allow an Offeror unfair advantage over those more competitive offers.

**ORAL PRESENTATIONS** – Following the technical evaluation, the selection committee reserves the right to require shortlisted bidders to present key parts of their submitted proposals to the committee. Based on those presentations, the selection committee will make the final decision.

The Offer that scores the highest will be determined the most responsive to the RFP and the project needs.

FHI 360 reserves the right to award one or more contracts under this RFP on the basis of initial offers without discussions or without establishing a competitive range.

# GENERAL TERMS AND CONDITIONS

1. Any proposal received in response to this solicitation will be reviewed strictly as submitted and in accordance with Section VIII, Evaluation Criteria.
2. EXECUTIVE ORDER 13224 ON TERRORIST FINANCING

Offerors are informed that FHI 360 complies with U.S. Sanctions and Embargo Laws and Regulations including Executive Order 13224 on Terrorist Financing, which effectively prohibit transactions with persons or entities that commit, threaten to commit or support terrorism. Any **person or entity** that participates in this bidding process, either as a prime or sub to the prime, must certify as part of the bid that he/she/it is not on the U.S. Department of Treasury Office of Foreign Assets Control (OFAC) Specially Designated Nationals (SDN) List and is eligible to participate. FHI 360 shall disqualify any bid received from a person or entity that is found to be on the List or otherwise ineligible.

Firms or individuals that are included on the Excluded Parties List System ([www.epls.gov](http://www.epls.gov/)) shall not be eligible for financing and shall not be used to provide any commodities or services contemplated by this RFP.

1. TERMS AND CONDITIONS

Offerors are responsible for review of the terms and conditions described.

1. CONTRACT MECHANISM

FHI 360 is anticipated to award a fixed-price subcontract to the Offeror whose proposal will be evaluated based on the evaluation criteria described previously.

1. WITHDRAWALS OF PROPOSALS

Offerors may withdraw proposals by written notice via email received at any time before award. Proposals may be withdrawn in person by a vendor or his/her authorized representative if the representative’s identity is made known and if the representative signs a receipt for the proposal before award.

1. RIGHT TO SELECT/REJECT

FHI 360 reserves the right to select and negotiate with those firms it determines, in its sole discretion, to be qualified for competitive proposals and to terminate negotiations without incurring any liability. FHI 360 also reserves the right to reject any or all proposals received without explanation.

1. DUE DILIGENCE PROCESS

Any selected firm will be required to complete a Financial Pre-Award Assessment in order for FHI 360 to ascertain that the organization has the capacity to perform successfully under the terms and conditions of the proposed award. As part of the Pre-Award Assessment process, the firm will also be requested to submit a financial audit report from the previous fiscal year. In addition, payroll records and other financial information may be requested to support budgeted costs.

1. CLIENT PRIOR APPROVAL

The selected offeror will be subject to funding agency approval before a subcontract can be awarded. Therefore, organizations are reminded that there may be delays for this process to be completed. In addition, should such approval not be given, this subcontract cannot be awarded.

1. DISCLAIMER

This RFP represents only a definition of requirements. It is merely an invitation for submission of proposals and does not legally obligate FHI 360 to accept any of the submitted proposals in whole or in part, nor is FHI 360 obligated to select the lowest priced proposal. FHI 360 reserves the right to negotiate with any or all firms, but with respect to price, costs and/or scope of services. FHI 360 has no contractual obligations with any firms based upon issuance of this RFP. It is not an offer to contact. Only the execution of a written contract shall obligate FHI 360 in accordance with the terms and conditions contained in such contract.

1. REQUEST FOR PROPOSAL FIRM GUARANTEE

All information submitted in connection with this RFP will be valid for 90 (ninety) days from the RFP due date. This includes, but is not limited to, cost, pricing, terms and conditions, service levels, and all other information. If your firm is awarded the contract, all information in the RFP and negotiation process is contractually binding.

1. OFFER VERIFICATION

FHI 360 may contact Offerors to confirm contact person, address, bid amount and that the bid was submitted for this solicitation.

1. FALSE STATEMENTS IN OFFER

Offerors must provide full, accurate and complete information as required by this solicitation and its attachments.

1. CONFLICT OF INTEREST

Offerors must provide disclosure of any past, present or future relationships with any parties associated with the issuance, review or management of this solicitation and anticipated award in or outside of Jordan.

Failure to provide full and open disclosure may result in FHI 360 having to reevaluate selection of a potential vendor.

1. RESERVED RIGHTS

All RFP responses become the property of FHI 360, and FHI 360 reserves the right in its sole discretion to:

* To disqualify any offer based on offeror failure to follow solicitation instructions.
* FHI 360 reserves the right to waive any deviations by vendors from the requirements of this solicitation that in FHI 360’s opinion are considered not to be material defects requiring rejection or disqualification, or where such a waiver will promote increased competition.
* Extend the time for submission of all RFP responses after notification to all vendors.
* Terminate or modify the RFP process at any time and reissue the RFP to whomever FHI 360 deems appropriate.
* FHI 360 reserves the right to issue an award based on the initial evaluation of offerors without discussion.
* FHI 360 reserves the right to award only part of the activities in the solicitation or issue multiple awards based on solicitation activities.
* FHI 360 will not compensate offerors for preparation of their response to this RFP.
* Issuing this RFP is not a guarantee that FHI 360 will award a subcontract.
* FHI 360 may choose to award a subcontract to more than one offeror for specific parts of the activities in the RFP.

**ATTACHMENTS**

Annex A – Budget Template

Annex B – Budget Narrative Template

Annex C – Biodata Form

Annex D – Evidence of Responsibility and Independent Price Determination Form

Annex E – Subcontract Terms and Conditions

Annex F – Past Performance Reference Form

**[END OF RFP]**

1. ECORYS (2012) “The number of Jobs dependent on the Environment and Resource Efficiency improvements”. ECORYS, Final Report, Rotterdam, 3 April 2012. [↑](#footnote-ref-2)
2. ECORYS (2012) “The number of Jobs dependent on the Environment and Resource Efficiency improvements”. ECORYS, Final Report, Rotterdam, 3 April 2012. [↑](#footnote-ref-3)
3. For USAID’s list of developing countries, please see <http://www.usaid.gov/sites/default/files/documents/1876/310maa.pdf> [↑](#footnote-ref-4)
4. For USAID’s list of developing countries, please see <http://www.usaid.gov/sites/default/files/documents/1876/310maa.pdf> [↑](#footnote-ref-5)