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

**REQUEST FOR PROPOSALS (RFP):**

**ETHMAR for ISLAMIC FINANCE**

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| **RFP Date of Issuance:** | **September 18, 2016** |
| **Due Date for Questions:** | **September 28, 2016**Submission of questions or requests for clarification in writing via email to **RFP@jordanlens.org** by **16:30 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 LENS or ETHMAR employees regarding this RFP**. Contacting individual employees shall be cause for disqualification.
* NO TELEPHONE INQUIRIES WILL BE ANSWERED.
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| **Deadline for Proposals:** | **October 23, 2016**; Submission of proposals (including technical proposal and budget) are due by **16:30 Hours local time in Jordan** via email to **RFP@jordanlens.org**. Emailed submissions must contain the subject line “USAID LENS – ETHMAR Product Development.” |

# PURPOSE STATEMENT

The purpose of this Request for Proposals (RFP) is to solicit proposals from prospective contractors to support FHI 360’s implementation of the USAID Jordan Local Enterprise Support (LENS) Project, funded by the United States Agency for International Development (USAID), Award No. AID-278-LA-14-00001. Under this RFP, USAID LENS solicits proposals from interested, qualified and eligible bidders to support ETHMAR for Islamic Finance to establish a product development capability, utilizing a structured approach to dynamically and continuously introduce and implement new products and services as well as to enhance existing products and services offered.

This RFP is issued as a public notice to ensure that all interested, qualified and eligible organizations have a fair opportunity to submit proposals. The authorized USAID geographic code for this RFP and any resulting award is Code 937 (the United States, Jordan, and developing countries other than advanced developing countries[[1]](#footnote-1)). Thus, the order of preference for this award is Geo Code 937, and the initial evaluation will only include bids from Geo Code 937 countries. If no firm in Geo Code 937 is deemed to be technically qualified, then offerors from Geo Code 935 (any area or country, but excluding any country that is a prohibited source[[2]](#footnote-2)) will be considered. To be deemed technically qualified, bids must score 65 or above on the technical evaluation portion. This minimum score applies to all bids regardless of the Geo Code. Thus, if no bidder scores above 65 on the technical evaluation portion, there will be no awards from this RFP. If the selected offeror is within Geo Code 935, then contract award will be subject to approval by USAID of a Geographical waiver that FHI 360 will request.

# PROGRAM BACKGROUND

The USAID Jordan Local Enterprise Support Project (LENS) is a five-year project to encourage the long-term economic growth and development potential of underserved Jordanian communities. The project helps empower local communities to design and implement collaborative local economic development (LED) initiatives and supports the vitality and competitiveness of micro and small enterprises (MSEs) that are often at the heart of individual, family and community livelihood within vulnerable populations.

USAID LENS is actively supporting the microfinance sector in Jordan to build its capacities, enhance its competitiveness, and increase the sector’s financial inclusion of different client segments to enhance their living standards through involvement in producing economic activities. Accordingly, USAID LENS is funding an initiative to support ETHMAR for Islamic Finance to establish its product development capability, utilizing a structured approach to dynamically and continuously introduce and implement new products and services as well as to enhance existing products and services offered.

Similar to global trends, Jordan’s potential demand for tailored Islamic microfinance products is still largely unmet. Market research indicates that individuals choosing or preferring Islamic microfinance in Jordan could reach as high as 160,000, of which only 4% has been reached by institutions offering Islamic microfinance products[[3]](#footnote-3). To address this unmet demand, ETHMAR for Islamic Finance was established in 2015 as an independent for-profit Islamic microfinance company, registered as a private shareholding company owned by King Hussein Foundation and Tamweelcom, and was launched as the first micro-finance company offering Sharia-compliant financial products in Jordan.

ETHMAR aims to address a market gap by fulfilling the need for Islamic microfinance products and services in Jordan through offering standard products (i.e. Murabaha), in addition to niche products such as Ju'ala and Istisna'a. It will expand choices for utilizing a different range of financing alternatives and will target eligible microfinance clients, especially females and micro entrepreneurs, who prefer or insist on Sharia-compliant products and will offer high service standards to its clients.

Initially, ETHMAR will focus on offering its services through 7 branches located in high population density areas with the focus on building the quality of its products and services. It is expected that ETHMAR will then build on this knowhow and apply an expansionary strategy.

It is imperative for ETHMAR’s success to target the right customer segments with the right product offering. This will require continuous monitoring, assessing and evaluating the local and international market place as well as potential customer segments to understand trends in terms of needs, behaviors and preferences to continually design, develop and offer products and services. This project will address the aforementioned by establishing product development capability at ETHMAR.

# SCOPE OF WORK/TASKS/DELIVERABLES

This work will **build ETHMAR’s product development capability** to develop understanding of market environment to select, design and introduce new products, services and offerings to new and existing customer segments. The overall goal of this work is to introduce new products, services and offerings appealing to new and existing customer segments that will lead to enhancing customer satisfaction and increasing outreach.

The Selected Firm will be responsible for the **SPECIFIC TASKS AND DELIVERABLES** as outlined in the below table:

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| --- | --- | --- |
| **NO.** | **TASKS**  | **DELIVERABLES** |
| **1** | Develop an organizational unit to manage product development. Outline the unit’s organizational structure and draft job descriptions, roles and responsibilities, key performance indicators (KPIs) and instructions for performance monitoring.  | Overview of organizational unit developed that includes:- unit structure- job descriptions- roles and responsibilities- KPIs and performance monitoring instructions |
| **2** | Define approach to developing an understanding of market trends, including consumer behaviors, technological innovations, potential gaps, and potential solutions. Develop a Guidebook to establish periodic review of market trends. | Guidebook to periodic review of market trends developed that includes:- review guidelines- review calendar- templates |
| **3** | Define “New Product Development” process, and develop guidelines and procedures including: |
| **3a** | * Develop Overview of new product development process, identifying roles and responsibilities, creating process flow charts, developing process design templates, and creating implementation and testing templates and guidelines
 | Overview of new product development process that includes: - roles and responsibilities - process flow charts- product design templates- implementation and testing templates and guidelines |
| **3b** | * Develop Guidebook to new product selection, including assessment and selection approach and guidelines; assessment and evaluation tools and templates; and templates for new product concept, proposal and implementation plan
 | Guidebook to new product selection that includes:- assessment and selection approach and guidelines- assessment and evaluation tools & templates- templates for new product concept, proposal and implementation plan  |
| **3c** | * Select potential new products, services and offerings:
	+ Assess impact and define objectives for each product
	+ Determine financial returns
	+ Identify organizational changes needed
	+ Develop proposal to ETHMAR management to obtain approval
 | Selected new products, services and offerings identified, with the following conducted for each:- Impact assessment and objectives defined - Financial returns determined- Required organizational changes identified- Proposal to ETHMAR management to obtain approval developed. |
|  | Examples for Contracts/Products for Islamic Finance may include:1. Purchase and sales contracts

1. Murabahah2. Musawamah3. Istina4. Salam1. Leasing Contracts

1.Ijarah2.Ijarah ending in ownership1. Partnerships

1. Mudarabah2. Musharakah1. Lending/Donation Contracts

1.Qard Hasan2.Rahn1. Investment accounts

1. Wakalah2. Equity funding/Retained earnings3.Waqf/Islamic endowment1. Shariah-compliant Insurance (Takaful)
 |  |
| **3d** | * Develop a training approach to new products, services and offerings
 | New product training approach developed that includes:- standard training materials- training roles and responsibilities- training calendar (including refresher courses)- KPI to measure training effectiveness |
| **3e** | * Define sales approach determining:
	+ Customer segments targeted
	+ Pricing
	+ Targets
 | Sales process and cycle developed that includes:- target consumer sizing tools- assignment of targets and sales mechanism- tools for follow-up and measurement of sales performance |
| **3f** | * Implement organizational capabilities to support new products such as:
	+ product performance management template and measures
	+ operations including processes and procedures
	+ incentives and rewards
 | 1. Incentives and rewards scheme developed that includes processes and templates to assign targets, measure performance and determine compensation 2. Operational performance measurement developed that includes:- design of monitoring process- templates for measurement of operational performance3. Product performance management process developed that includes:- how to measure, track and review products- how to determine and implement modifications to products/features4. Reporting templates and standards developed that include:- products - processes- customer segments |
| **3g** | * Implement continuous quality assurance and measurement process for all ETHMAR products
 | Continuous quality assurance and measurement process implemented for all ETHMAR products |
| **3h** | * Establish and implement reporting standards for new product development based on international best practices
 | Reporting standards established and implemented for new product development based on international best practices |
| **4** | Train ETHMAR team responsible for managing new product development.  | Orientation and training session conducted for ETHMAR team that covers all deliverables developed under this project |
| **5** | Work with product development team to develop one new product under the direction of the technical assistance provider as a “learning by doing” exercise. This would include:* Conduct market research based on designed procedures and obtain findings
* Based on findings, determine a product development strategy including:
	+ Selection of products, services and offerings with potential in the Jordanian market and rationale
	+ Prioritization of implementation based on attractiveness of the product and ability of ETHMAR to implement
 | One new product introduced, using the following process:- providing direction and advising on utilizing project deliverables for this exercise- reviewing ETHMAR product development team’s research and deliverables, conducting discussions and challenging assumptions |
| **6** | Develop and test new product. Based on outcome of task #5, define testing approach including measurement standards and KPIs. | New product developed and tested, with report that defines testing approach including measurement standards and KPIs |
| **7** | Supervise and direct ETHMAR product development team in implementing new product identified utilizing the design process | New product implemented  |
| **8** | Review lessons learned via Monitoring and Evaluation. Develop a report describing the new product implementation, highlighting any recommended changes. | Report describing the new product implementation, including recommended changes |
| **9** | Make revisions to either product or product development process as appropriate. | Revisions to product or product development process |
| **10** | Develop product calendar to introduce products and identify additional efforts needed to properly promote and introduce products (e.g. training, marketing, etc). | Product Calendar developed, and final report highlighting any steps and improvements for the future |
| **11** | Implement strategy and calendar to introduce new products as per procedure developed | Strategy and calendar implemented |

***\*NOTE:*** *before initiation of detailed work on all above deliverables, an outline of each deliverable must be submitted and accepted by USAID LENS and ETHMAR before initiation of work. All written deliverables are to be submitted in English.*

# 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 solicitation is open to all interested, qualified and eligible organizations. The authorized USAID geographic code for this RFP and any resulting award is **Geographic Code 937** (the United States, Jordan, and developing countries other than advanced developing countries[[4]](#footnote-4)). Thus, the order of preference for this award is Geo Code 937, and the initial evaluation will only include bids from **Geo Code 937** countries. If no firm in Geo Code 937 is deemed to be technically qualified, then offerors from Geo Code 935 (any area or country, but excluding any country that is a prohibited source[[5]](#footnote-5)) will be considered. To be deemed technically qualified, bids must score 65 or above on the technical evaluation portion. This minimum score applies to all bids regardless of the Geo Code. Thus, if no bidder scores above 65 on the technical evaluation portion, there will be no awards from this RFP.  If the selected offeror is within Geo Code 935, then contract award will be subject to approval by USAID of a Geographical waiver that FHI 360 will request.
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 should be submitted in USD if offeror is based outside of Jordan.
2. Proposals must remain valid for a minimum of **ninety (90) days**. The Offeror may submit its proposal by the following means:
* Electronically - Internet email with up to two (2) attachments per email compatible with MS WORD, Excel, and Adobe Acrobat in a MS Windows environment to: **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/DELIVERABLES. 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. 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 16 pages** in total. Pages in excess of **16 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 ten (10) pages.**

The Offeror shall demonstrate its understanding, ability and overall approach and methodology 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. **Capability Statement/Past Performance References** **– Not to exceed four (4) pages**

Offerors are required to provide a one (1) page organizational overview – include year of establishment, brief history, products/services offered and how they relate to ETHMAR product development requirements. Offerors are required to provide three (3) completed or current project profiles where the Offeror has delivered or is delivering **similar services** within the last three (3) years. Please describe how the profiled projects demonstrate past performance related to new product development. Particular attention will be paid to those performed in Jordan and the Middle East. Also include contact information for client references associated with these projects: company or organization, name, title, phone number and email. Please use the Past Performance Reference Form template in **Annex E.**

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

A summary describing the proposed staff for the project, with 2-3 sentence bios for proposed field team leaders and essential personnel. 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 III. 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 ETHMAR 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 should be submitted in USD if offeror is based outside of Jordan.
2. Offer **must indicate the inclusion/exclusion** of any applicable taxes such as **VAT.**
3. **If the Offeror is a US-based organization and has a Negotiated Indirect Cost Rate Agreement (NICRA) with the US Government, then a copy must be provided. Otherwise, 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 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:

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| --- | --- | --- |
|  | **MANDATORY REQUIREMENTS** | **MEETS REQUIREMENT** |
| **1** | **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** |
| **2** | **The detailed cost proposal follows the prescribed format.** | **YES/NO** |

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

Bids will be evaluated and ranked by a committee according to the following criteria. The number of points assigned to each criterion represents its weight in the evaluation process. Only service providers that meet the requirements in section IV.1 will be considered for technical evaluation.

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, per the geographic code order of preference previously stated in this RFP.

|  |  |  |
| --- | --- | --- |
| **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.*

**Oral presentations:**

Following the technical and cost 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 technically qualified bid that scores the highest with technical and cost score combined will be determined the most responsive to the RFP and the project needs, per the Geo Code order of preference previously stated in this RFP.

FHI 360 reserves the right to award one or more contracts under this RFP on the basis of initial bids without discussions.

***NOTE:*** *FHI 360 and USAID LENS 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.*

# GENERAL TERMS AND CONDITIONS

1. Any proposal received in response to this solicitation will be reviewed **strictly** as submitted and in accordance with Section V, Evaluation Criteria.
2. SOURCE OF FUNDING AND GEOGRAPHIC CODE

Any award issued under this RFP will be financed by USAID funding and will be subject to U.S. Government and USAID regulations. The authorized USAID geographic code for this RFP and any resulting award is Code 937 (the United States, Jordan, and developing countries other than advanced developing countries[[6]](#footnote-6)). Thus, the order of preference for this award is Geo Code 937, and the initial evaluation will only include bids from Geo Code 937 countries. If no firm in Geo Code 937 is deemed to be technically qualified, then offerors from Geo Code 935 (any area or country, but excluding any country that is a prohibited source[[7]](#footnote-7)) will be considered. To be deemed technically qualified, bids must score 65 or above on the technical evaluation portion. This minimum score applies to all bids regardless of the Geo Code. Thus, if no bidder scores above 65 on the technical evaluation portion, there will be no awards from this RFP. If the selected offeror is within Geo Code 935, then contract award will be subject to approval by USAID of a Geographical waiver that FHI 360 will request.

1. 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 – Past Performance Reference Form

Annex F – Subcontract Terms and Conditions

**[END OF RFP]**

1. For USAID’s list of developing countries, please see <http://www.usaid.gov/sites/default/files/documents/1876/310maa.pdf> [↑](#footnote-ref-1)
2. For USAID’s list of prohibited source countries, please see: ttps://www.usaid.gov/ads/policy/300/310mac [↑](#footnote-ref-2)
3. Sanabel - the Microfinance Network of Arab Countries – 2012 [↑](#footnote-ref-3)
4. For USAID’s list of developing countries, please see <http://www.usaid.gov/sites/default/files/documents/1876/310maa.pdf> [↑](#footnote-ref-4)
5. For USAID’s list of prohibited source countries, please see: ttps://www.usaid.gov/ads/policy/300/310mac [↑](#footnote-ref-5)
6. For USAID’s list of developing countries, please see: <http://www.usaid.gov/sites/default/files/documents/1876/310maa.pdf> [↑](#footnote-ref-6)
7. For USAID’s list of prohibited source countries, please see: ttps://www.usaid.gov/ads/policy/300/310mac [↑](#footnote-ref-7)