**REQUEST FOR PROPOSALS**

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

**MARKET RESEARCH TEAM FOR FINCA JORDAN**

RFP Date of Issuance: **August 20th, 2017**

Due Date for Questions: **August 27th, 2017**

Submission of questions or requests for clarification in writing via email to [**RFP@jordanlens.org**](mailto:RFP@jordanlens.org)by **15:00 Hours local time in Jordan**

Due Date for Proposals: **September 12, 2017**

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: “USAID LENS – Market Research enumerators.” Proposals not received by E-mail by the deadline may be considered unresponsive and not considered.

# PROGRAM BACKGROUND

The USAID Jordan Local Enterprise Support Project (USAID LENS) is a five-year project to encourage the long-term economic growth and development potential of underserved Jordanian communities, implemented by FHI 360. The project empowers 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.

In its inter-related activities, the project works with public and private sector partners at the municipal, governorate and national levels to develop local environments conducive to investment and MSE growth. One of our key constituencies is Microfinance Institutions (MFIs). MEDA, a subcontractor supporting all activities on access to finance (A2F) under the USAID LENS project has jointly implemented a range of activities to increase lending to MSEs in the project’s target communities.

# PURPOSE STATEMENT

The purpose of this Request for Proposal (RFP) is to solicit proposals from prospective vendors to support FHI 360’s implementation of the USAID Jordan Local Enterprise Support Project and MEDA’s implementation of A2F activities, funded by the United States Agency for International Development (USAID), Award No. AID-278-LA-14-00001. This RFP is issued as a public notice to ensure that all interested, qualified, and eligible organizations based in Jordan have a fair opportunity to submit proposals.

USAID LENS is working with several Microfinance Institutions (MFIs) in Jordan to increase access to finance for Micro and Small Enterprises (MSEs). Microfinance has proved to be a powerful and effective tool in empowering Jordan’s entrepreneurial poor and vulnerable segment to increase their family income and contribute to socio-economic growth.

Established in 2007, FINCA Jordan (one of the MFIs partners) offers market solutions which can be accessed through a wide range of loan products. Due to the competition and an increasingly sophisticated customer base, USAID LENS will provide support to FINCA Jordan **to conduct market research to determine appropriate customer segmentation** and to explore options to better meet the needs and preferences of each customer segment.

The segmentation output will be used to map against current product offerings and to establish the fit and appropriateness of the products and to more effectively and efficiently target clients through improved promotion, modification/development of product placement and pricing.

USAID LENS is now soliciting proposals from Jordanian research firms, international firms based in Jordan or with Jordanian offices to assist in the market research as per the Scope of Work below.

# SCOPE OF WORK (SOW)

Activities

USAID LENS consultants and FINCA will coordinate the overall customer and market research project, including the work under this RFP. The selected company under this RFP will be responsible for leading the following activities:

1. Establish a research team

The research firm will manage the implementation of the survey. As such, it is critical to put together a strong and experienced team including: Project Manager, Enumerators, Quality Assurance Supervisors and Translators. All team members must be available for the duration of the study. They must have extensive experience using various research methodologies to collect information from key informants and conducting mobile surveys. They must be fluent in Arabic.

1. Translate survey tools, create and test mobile optimized survey

USAID LENS team is developing all the survey tools in English. The research firm will: i) translate them into Arabic under the supervision of FINCA Jordan; ii) create a mobile optimized survey using the tools developed by USAID LENS; iii) test the mobile optimized survey, and iv) make recommendations to refine the mobile survey as needed.

1. Train research team

USAID LENS will work with the research team leader to prepare him/her to train the Enumerators and the Supervisors. All research team members must attend the training.

1. Conduct in-person interviews and Focus Group Discussions (FGDs)

A mixed qualitative and quantitative methods will be used. USAID LENS team is still determining the sample size; however, the research firm must propose a plan and budget to conduct in a timely manner a study with a maximum of 1,500 respondents *(inclusive of both FINCA Jordan clients and non-clients)* in the following locations: Salt, Irbid, Sweileh, Karak and Zarqa.

1. Ensure rigorous quality assurance

The research firm must be able to ensure the integrity of data collected. The technical proposal must include a thorough description of the quality assurance process that will be applied.

1. Provide clean dataset in Arabic and English to USAID LENS

The research firm must provide all raw survey responses (in Arabic and English) and must be available to participate in meetings and engage in discussions with the USAID LENS team to help analyze and interpret the findings as needed.

1. Provide FGDs notes in Arabic and English to USAID LENS

All FGDs notes must be submitted in Arabic and English to USAID LENS. The research firm must remain available to answer to clarifying questions as necessary.

1. Follow-up with certain informants as needed

Depending on findings of quantitative survey, research firm may be required to conduct follow-up on certain segments.

1. Participate in presentation to FINCA Jordan

The research firm will be called upon to participate in meetings with FINCA Jordan and USAID LENS to present the findings of the study.

Required qualifications

1. Applicant should be able to demonstrate in-depth experience in managing and implementing large scale surveys using a range of qualitative and quantitative methods;
2. Applicant should demonstrate experience managing the logistics of large scale surveys;
3. Preference will be given to research firm with previous work experience with Jordanian MFIs and/or in the areas of: Salt, Irbid, Sweileh, Karak and Zarqa;
4. Preference for research firm that has the technical ability to create and owns all devices (tablets/smartphones) necessary to conduct and manage mobile surveys. Applicant should specify in their proposal the number of devices they will deploy and the mobile data collection software/applications that they recommend for this assignment.
5. Applicant should demonstrate experience working as a team to conduct surveys and should clearly describe the roles of each member of the team.

# DELIVERABLES

| **No.** | **Deliverables** | **Due date to be proposed as the number of days following the kick-off of the work** |
| --- | --- | --- |
| 1 | Translate questionnaire and create mobile optimized survey format questionnaire to mobile device | 3 days |
| 2 | Training of research team | 5 days |
| 3 | Implementation of pilot inclusive of pilot results and adjustments | 7 days |
| 4 | Clean data set in Arabic and English | 20 days |
| 5 | Follow-up findings | 25 days |
| 6 | Final presentation to FINCA (1-3 page report on implementation, data collection procedures, error rate and quality control procedures) | 30 days |

# 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 (**Attachment-A**), along with a copy of your organization’s legal registration, are included with the technical proposal. Proposals not attaching these two requirement documents may be rejected.

1. This RFP is open to interested Offerors registered for business in Jordan. The lead staff involved in this activity and those communicating with USAID LENS must be fluent in both English and Arabic. Jordanian firms, international firms based in Jordan or with Jordanian offices are encouraged to apply. One lead organization or firm must be clearly identified and is responsible for handling all reporting and coordination with USAID LENS. The Offeror must also propose a Project Manager that serves as the primary Point of Contact (POC) for USAID LENS.
2. The Offeror is requested to submit a proposal directly responsive to the terms, conditions, and clauses 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 pricing.

### 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.

### Technical Proposals shall be written in English. Cost proposals shall be presented in Jordan Dinar.

### Proposals must remain valid for a minimum of **sixty (60) days**. The Offeror must 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](mailto:RFP@jordanLENS.org).

**Do not contact individual USAID LENS, MEDA or FINCA staff regarding this proposal. Any questions pertaining to the RFP shall be submitted in writing to USAID LENS by the deadline. Entities attempting to contact individuals regarding this solicitation shall be disqualified**.

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 USAID LENS to evaluate proposals and make an award without discussions. However, USAID LENS reserves the right to conduct discussions should USAID LENS 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. 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 SoW 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 shall be limited to 5 pages in total, not including the Organizational Information, CVs of proposed personnel, and Annex described below.*** Pages in excess of 5 pages will not be read or evaluated.

Items such as graphs, charts, tables may be used as appropriate but will be considered part of the page limitation. Key personnel resumes, bio-data sheets, dividers, and past performance report forms are not included in the page limitation. However, ***Offerors are encouraged to provide evidence of past experience in similar activities in an Annex not to exceed 3 pages.***

1. **Organizational Information (not part of page limit):**

* Organization’s legal name
* Contact name
* Contact person’s position
* Email address
* Telephone number
* Evidence of Responsibility and Independent Price Certification Form (includes confirmation that firm is a USAID-designated Geo Code 937 country)
* Copy of legal registration to do business in Jordan

1. **Technical Approach– A narrative not to exceed two (2) pages.**

The Offeror shall demonstrate its understanding, ability and overall approach to performing the requirements described in the Scope of Work and in the deliverables. The Offeror should clearly explain how they propose to structure, manage and execute the work required to organize this survey that meet USAID LENS. The Technical Approach must include a timeline or Gantt chart of the deliverables required to execute the service as aligned to the Deliverables table above in Section VII. In addition the Offeror may identify challenges to execution, and their proposed solutions and risk mitigation strategies, and must also identify all resources and materials that will be key to delivery.

1. **Capability Statement -** **A narrative – not to exceed one (1) page.**

The Offeror shall demonstrate its specialized competence with regards to the requirements of the tasks/activities. The Offeror shall demonstrate it has the necessary organizational systems and personnel to successfully comply with the contract requirements and accomplish the expected results. This should not reference past performance examples but provide an overview of the firm’s experience in similar work and locations.

1. **Past Performance – A narrative not to exceed one (1) page.**

The Offeror shall provide a narrative summary of three (3) examples of past performance of organizing similar surveys in Jordan as being requested in this RFP. Please use the PPR template in **Attachment E** to submit past performance information. The past performance examples must be within the last three (3) years and should be similar in terms of the SoW, methodology and locations as described in this RFP. The Offeror must provide references for each example, including the name, title, phone number and email address of the reference that can be contacted. ***Offerors are encouraged to provide evidence of past experience in similar activities in an Annex not to exceed 3 pages.***

1. **Personnel/Staffing – A narrative not to exceed one (1) page.**

The Offeror shall identify, in summary format of 2-3 sentences each, the names, anticipated positions, and up to 3 team leaders proposed to perform the requirements of this scope of work, including their relevant qualifications, examples of similar work, and their role in said activity. ***A Project Manager must be identified that has at least 5 years of experience in managing similar work.***

The Offeror can also include the CVs of key staff members involved in the Project, including the Project Manager and up to 3 Team Leaders in an Annex that is not considered part of the Technical Proposal and does not fall within the page limitations. Each CV should not exceed three (3) pages. ***Note: proposed salaries for staff shall be supported by the salary history certified in the biodata forms. MEDA reserves the right to verify salary history and rates.***

**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 ***Attachment B - Budget Template***.

The detailed cost proposal should be presented as per the Budget template (**Attachment B*).*** The Cost Proposal should include the following:

* Proposed staff
* Rates (please provide a biodata form, Attachment D for each proposed staff person)
* Number of days needed to accomplish the work
* Transportation
* Translation

Provide in the Budget Narrative section a concise description and justification for each line item cost. Be sure to include data 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 MEDA may review the proposed budget for reasonableness. ***Please use Attachment C – Budget Narrative Template.***

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

Offers including budget information determined to be unreasonable, incomplete, and 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 shall be presented in Jordan Dinar.
2. Offer must indicate the inclusion/exclusion of any applicable taxes such as VAT.
3. If indirect costs are proposed, Offeror must provide a copy of its current NICRA (Negotiated Indirect Cost Rate Agreement) issued by a US Government Agency. The detailed budget breakdown shall be structured and formatted to clearly and easily identify the indirect rate(s) applied, and the resulting dollar amount. If the Offeror does not have a NICRA, an externally certified indirect rate, or cannot otherwise justify charging an indirect cost rate, the offeror is instructed to directly charge all costs.
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 (**Attachment D**) for any proposed staff named in the budget.
7. Other Direct Costs – Itemize and provide complete details of other direct costs, including unit prices that may be incurred as aligned to the categories noted above.
8. Daily rates for proposed staff must be unloaded, NO INDIRECT COST WILL BE ACCEPTED.

# EVALUATION CRITERIA

This solicitation is open to Jordanian research firms and international firms based in Jordan that specialize in managing and conducting large scale surveys. Key staff, including the Project Manager that will serve as the primary point of contact with USAID LENS must be fluent in both English and Arabic. The selected company will be responsible for designing and executing all activities outlined in this Request for Proposal in cooperation with USAID LENS, and will serve as the primary Point of Contact and Project Manager.

Technical Evaluation will represent 80 points of the total available, with the remaining 20 points based on Cost Evaluation, which will include the cost comparison to other bidders, cost reasonableness (noting that low bids may be deemed unrealistic or unreasonable to accomplish the intended results of this RFP), and sufficient explanation of budget items and notes.

***Only bids that receive a technical evaluation score a minimum score of 65 points and above will be considered for cost evaluation.***

| Section | Description | Maximum Points |
| --- | --- | --- |
| Technical Approach | - Proposed approach to execute the work required (including quality assurance process). (10 points)  - Ability to create mobile optimized survey and to conduct mobile data collection. (10 points)  - Timeline or Gantt chart of the activities required to execute this work. (10 points) | 30 |
| Capability Statement | Demonstration of the necessary organizational systems and personnel to successfully comply with the contract requirements and accomplish the expected results. (10 points) | 10 |
| Past Performance | - Inclusion of at least 3 relevant past performance examples of similar work in Jordan or the region (10 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. (10 points) | 20 |
| Personnel/Staffing | - Qualifications and past relevant experience of the Project Manager and up to 3 team members proposed to perform the requirements of this scope of work. (20 points) | 20 |
| Cost Evaluation | - Details and clarity of the actual costs proposed. (5 points)  - Comparison of the Offeror’s cost to other Offerors for Cost Evaluation. (5 points)  - Cost Realism to consider whether the proposed costs and human and other resources are sufficient to effectively carry out the stated tasks. (10 points)  Please use the attached Cost Template to prepare the budget. | 20 |
|  | | |
| Total Points |  | 100 |

**Oral presentations:**

Following the technical and cost evaluation, the selection committee reserves the right to require shortlisted applicants to present key parts of their submitted applications to the committee. Based on those presentations, the selection committee will make the final decision.

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

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

**COMPETITIVE RANGE** – If MEDA determines that discussions are necessary; MEDA may establish a Competitive Range composed of only the most highly rated proposals. MEDA may exclude an offer from the competitive range if it is so deficient as to essentially require a new technical proposal. MEDA 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. MEDA 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.

MEDA 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 IX, Evaluation Criteria.
2. EXECUTIVE ORDER 13224 ON TERRORIST FINANCING

Offerors are informed that MEDA 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 or 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. MEDA 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.

3. CONTRACT MECHANISM

MEDA anticipates to award a Purchase Order to the Offeror whose proposal will be evaluated based on the evaluation criteria described previously.

4. 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 an Offeror 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.

5. RIGHT TO SELECT/REJECT

MEDA 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. MEDA also reserves the right to reject any or all proposals received without explanation.

6. DUE DILIGENCE PROCESS

Any selected firm may be required to complete a Financial Pre-Award Assessment in order for MEDA 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.

7. CLIENT PRIOR APPROVAL

The selected Offeror may 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.

8. DISCLAIMER

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

9. REQUEST FOR PROPOSAL FIRM GUARANTEE

All information submitted in connection with this RFP will be valid for 60 (sixty) 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.

10. OFFER VERIFICATION

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

11. FALSE STATEMENTS IN OFFER

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

12. 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 MEDA having to reevaluate selection of a potential Offeror.

13. RESERVED RIGHTS

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

* To disqualify any offer based on offeror failure to follow solicitation instructions.
* MEDA reserves the right to waive any deviations by Offerors from the requirements of this solicitation that in MEDA’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 Offerors.
* Terminate or modify the RFP process at any time and reissue the RFP to whomever MEDA deems appropriate.
* MEDA reserves the right to issue an award based on the initial evaluation of offerors without discussion.
* MEDA reserves the right to award only part of the activities in the solicitation or issue multiple awards based on solicitation activities.
* MEDA will not compensate offerors for preparation of their response to this RFP.
* Issuing this RFP is not a guarantee that MEDA will make an award.
* MEDA may choose to award a subcontract to more than one offeror for specific parts of the activities in the RFP.

# ATTACHMENTS

* Attachment A: Evidence of Responsibility and Independent Price Determination Form
* Attachment B: Budget Template
* Attachment C: Budget Narrative Template
* Attachment D: Biodata Form
* Attachment E: Past Performance Reference (PPR)

**[END OF RFP]**