

Request for Proposals for
[Tax and Social Security Consultancy and Auditing Service Provider]



Dear Sir/Madam,

You are invited to submit a proposal to iMMAP with the requirements mentioned herein. The purpose of this request for proposal (RFP) is to identify suitable provider(s) to deliver Tax and Social Security Consultancy and Auditing services.

iMMAP is an international non-governmental organization (INGO) that provides targeted Information Management (IM) support to partners responding to complex humanitarian and development challenges. For more than 18 years, iMMAP has promoted measurable change in people's lives through the core philosophy that better data leads to better decisions, which ultimately lead to better outcomes. iMMAP's expertise in data collection, analysis and presentation has revolutionized the decision-making process for diverse, multi-sectoral partners who seek enhanced coordination and sustainable solutions through information management. iMMAP is home to a robust and dynamic team of recognized experts in social science, software development, statistics, (GIS), performance monitoring and evaluation, technical assistance and capacity development.

Emergency responders, development practitioners, governments and funders often have to make serious and timely decisions under fast paced and chaotic circumstances. When facing complex development challenges, natural disasters and emergencies, it is critical to make sound choices rooted in real-time knowledge of who is doing what, where they are doing it, and what needs to be done. Access to this critical information positions actors to avoid costly or duplicative efforts and, ultimately, to effectively direct support to the people who need it the most.

We anticipate that the bidder whose proposal suggests the best solution and prices for Tax and Social Security Consultancy and Auditing (as per the requirements set forth in this RFP) will be selected by 30/11/2021. We will notify all bidders, whether they are rejected or unsuccessful.

We thank you in advance for your effort and interest in iMMAP.

1.0 Scope of Services

This scope of work is intended to provide iMMAP with the following:

1.1.Tax – Social Security Consultation Services:

The service provider will represent iMMAP in Income Tax Department and Social Security Corporation besides providing advice and follow up services concerning national staff and international consultants serving in iMMAP Mena duty station.

1.2.Audit Service:

The service provider will be required to perform project expenditure verification missions and local organizational audits for the country office in Jordan, and report in connection with various donor grants according to the terms of reference (ToR) provided by the donor and/or iMMAP (Swiss Development Cooperation, European Commission...etc).

While at the same time observing adequate duty of care to its staff in Jordan.

Constraints: The result of this RFP process will be a framework agreement valid for two years and multiple assignments based on iMMAP needs, each specified in a separate purchase order with services to be delivered in a specified time frame.

2.0 Deliverables/Services

2.1 Tax and Social Security Consultancy:

- Represent iMMAP officially in Tax department.
- Provide tax advice on all iMMAP's service contracts as needed.
- Review and approve the employees' monthly tax calculations. In addition to leaving staff settlement calculations.
- Prepare the employees annual income tax sheets.
- Inform iMMAP with all tax department regulations and rules updates.
- Prepare and submit iMMAP income tax annual statement to income tax department and work through getting the annual tax clearance.
- Serve as a liaison in case of income tax audit.
- Provide support for staff in their annual online tax submission as needed.
- Handle monthly iMMAP income tax payments and provide receipts.
- Act as the appointed liaison with social security corporation in terms of updating the iMMAP subscription file and handling monthly payments and adding/deletion of staff, in addition to handling any raised issues concerning subscriptions.

2.2 Auditing Services

- The service provider will be required to conduct project verification missions according to the agreed-upon procedures as specified in the Terms of Reference (ToR) that will be received from each donor and to submit reports of factual findings that will be addressed to both donors and iMMAP.
- The service provider will conduct annual organizational audits for the local iMMAP registrations (iMMAP

Inc. and iMMAP France Association). Produce annual audit statements and provide management letters presenting overall feedback on the audited records.

- The Auditor shall undertake their engagement in accordance with:
 - The International Standard on Related Services ('ISRS') 4400 Engagements to perform Agreed-upon Procedures regarding Financial Information as promulgated by the International Federation of Accountants (IFAC).
 - The International Federation of Accountants (IFAC) Code of Ethics for Professional Accountants, developed and issued by the International Federation of Accountants (IFAC's) International Ethics Standards Board for Accountants (IESBA), which establishes fundamental ethical principles for Auditors regarding integrity, objectivity, independence, professional competence and due care, confidentiality, professional behavior and technical standards. Although ('ISRS') 4400 provides that independence is not a requirement for agreed-upon procedures engagements, the Contracting Authority requires that the Auditor is independent from the Beneficiary(ies) and complies with the independence requirements of the International Federation of Accountants (IFAC) Code of Ethics for Professional Accountants.

3.0 ADMINISTRATIVE INFORMATION

3.1 Expected Time Period for the Framework Agreement

The performance period of the framework agreement is expected to last **24 months**, starting from the date of signing the framework agreement as a result of this RFP. iMMAP reserves the right to award and fund any or all activities of this of the services specified in the scope of work in 2. Deliverables above. The successful proposer should be prepared to begin work according to the time schedule proposed by iMMAP.

3.2 RFP Coordinator

Written questions must be directed, via email, to rfps.mena@immap.org

3.3 Proposer Inquiries

iMMAP will consider written proposer inquiries regarding RFP requirements or Scope of Services until the date specified in the "3.4 Calendar of Events". iMMAP reserves the right to modify the RFP that is in the best interest of iMMAP.

To be considered, written inquiries and requests for clarification of the content of this RFP must be received via e-mail at rfps.mena@immap.org maximum by the local time and date as specified in the "3.4 Calendar of Events". All questions directed to the RFP Coordinator will be deemed to require an official response. Official responses to each of the questions presented by the proposers will be sent via email to all proposers by the date specified in the "3.4 Calendar of Events".

Only **the RFP Coordinator** has the authority to officially respond to a proposer's questions on behalf of iMMAP. Any communications from any other individuals are not binding to iMMAP.

3.4 Calendar of Events

Event	Date
Release RFP	03/10/2021
Proposer expression of interest and inquiries maximum by 5:00 pm Jordan time	06/10/2021
Response to proposer inquiries maximum by 5:00 pm Jordan time	10/10/2021
Proposal submission maximum by 4:00 PM Jordan Time	24/10/2021
Formally announce the “Successful Proposer”	30/11/2021
Execute contract	01/01/2022

NOTE: iMMAP reserves the right to amend and/or change this Calendar of Events of RFP activities as it deems necessary. The amendment will be notified via email.

4.0 PROPOSAL INFORMATION

4.1 Proposal Response Location

Proposers who are interested in providing professional services should submit a proposal as per instruction in Annex I- Format of Proposal in this RFP.

4.2 Required Qualifications of Proposer

4.2.1 Tax – Social Security Consultation Services:

- Previous experience in providing tax-social security services with similar INGOs.
- The Proposer must be registered with a regulatory body in Jordan and include a certified copy of the certificate granting aforementioned registration in the technical proposal envelope.
- Has enough staff capabilities to provide the service on a timely manner.
- Assign a focal point to handle iMMAP inquiries

4.2.2 Audit Service:

- The Audit firm is a member of a national accounting or auditing body or institution which in turn is member of the International Federation of Accountants (IFAC).
- The audit firm has at least 5 years of experience conducting organizational and project audits for similar international non-governmental institutions.
- The audit firm has a team of certified auditors with capacities enabling to conduct audits in a timely and professional manner as requested.

It is highly required that proposers of this RFP meet the following qualifications:

- The consultant or the leader of the consultancy team who will be assigned to iMMAP must have a minimum of 7 years’ related work experience.
- Experience in performing project expenditures verifications and global audits for international NGOs.
- Experience in performing project expenditures verifications on European Commission’s grants.

- Proposers should submit the audit report in both English and Arabic.
- Assign a focal point to handle iMMAP inquiries.

Proposers should ensure that their proposals contain sufficient information for iMMAP to make its determination by presenting acceptable evidence of the above to perform the services called for by this RFP.

4.3 RFP Addenda

iMMAP reserves the right to revise any part of the RFP by issuing an addendum to the RFP at any time. These addenda will be notified to the proposers via email.

4.4 Proposal Rejection

Issuance of this RFP in no way constitutes a commitment by iMMAP to award a framework agreement. iMMAP reserves the right to accept or reject, in whole or in part, all proposals submitted and/or cancel this announcement.

4.5 Withdrawal and Re-submission of Proposal

A proposer may withdraw a proposal that has been submitted at any time before the date and time the proposal is due. To accomplish this, a written request signed by the authorized representative of the proposer must be submitted to the RFP Coordinator at iMMAP Location specified in Annex I- Format of Proposal or via sending an email to the RFP coordinator on rfps.mena@immap.org

4.6 Service Provider Information

iMMAP shall have a single prime provider or more than one primary providers as the result of this RFP, and the provider(s) shall be responsible for all deliverables requested by iMMAP. This general requirement notwithstanding, proposers may not enter into subcontracting arrangements; and should acknowledge in their proposal total responsibility for the entire agreement.

4.7 Ownership of Proposal

All materials submitted in response to this RFP become the property of iMMAP. Selection or rejection of a proposal does not affect this right.

4.8 Proprietary Information

Only information which is in the nature of legitimate trade secrets or non-published financial data may be deemed proprietary or confidential. Any proposal marked as confidential or proprietary in its entirety may be rejected without further consideration or recourse.

4.9 Cost of Preparing Proposals

iMMAP is not liable for any costs incurred by prospective proposers prior to issuance of or entering into a framework agreement. Costs associated with developing the proposal and any other expenses incurred by the proposer in responding to this RFP are entirely the responsibility of the proposer and shall not be reimbursed in any manner by iMMAP.

4.10 Errors and Omissions in Proposal

iMMAP will not be liable for any errors in proposals and reserves the right to make corrections or amendments due to minor errors identified in proposals. iMMAP, at its option, has the right to request clarification or additional information from the proposer.

4.11 Framework Agreement Award and Execution

iMMAP reserves the right to enter into a framework agreement without further discussion of the proposal submitted based on the initial offer received. iMMAP reserves the right to enter into an agreement for all or a partial list of services offered in the proposal.

The RFP and proposal of the selected proposer will become part of any agreement between the selected service provider and iMMAP.

If the selected proposer fails to sign the final contract within 5 business days of delivery, iMMAP may elect to cancel the framework agreement and award the agreement to the next highest-ranked proposer.

5.0 RESPONSE INSTRUCTIONS

5.1 Proposal Submission

It is solely the responsibility of each proposer to assure that their proposal is received at iMMAP Location specified in Annex I-Format of Proposal prior and on the deadline date and time for submission as per of the “3.4 Calendar of Events”. Proposals received after the submission deadline will not be considered. The proposer shall insure to submit the following documents in **Two separate envelopes: one technical proposal and one financial proposal in order to evaluate their proposal.**

Technical Proposal envelope shall contain the following:

- 1- Copy of Company Registration in Jordan.
- 2- Technical proposal as per instructions in Annex I-Format of Proposal.
- 3- Signed and stamped Annex II-CERTIFICATION STATEMENT

Financial Proposal envelop shall contain the following:

- 1- Financial proposal as per instructions in Annex III- Financial Proposal

Note: *Even if the Proposer is one of the current or pervious iMMAP’s Service Providers, the copy of the company registration certificate and all above mentioned documents **must** be submitted to response this RFP.*

Failing to provide any of the above documents will result in excluding the vendor from the whole RFP evaluation.

5.2 Certification Statement

The proposer must sign, stamp and submit the ANNEX II-Certification Statement with the technical Proposal documents.

5.3 Proposal Format

The proposer should submit a proposal as specified in the RFP Annex I-Format of Proposal which shall include enough information to satisfy evaluators that the proposer has the appropriate experience and qualifications to perform the scope of services as described herein. The Proposer should respond to all requested areas.

6.0 EVALUATION AND SELECTION

6.1 Evaluation Team

The evaluation of proposals will be accomplished by an Evaluation Committee, to be designated by iMMAP, which will determine the proposal most advantageous to iMMAP.

6.2 Administrative and Mandatory Screening

All proposals will be reviewed to determine compliance with administrative and mandatory requirements as specified in the RFP in the following sections:

- Article 5.0-Response Instruction.
- Annex I-Format of Proposal.

Proposals found not to be in compliance will be rejected from further consideration.

Risk mitigation procedures should also be provided. iMMAP takes meeting duty-of-care obligations and compliance with the principles of 'do no harm' very seriously.

6.3 Evaluation and Review

The purpose of the RFP process is to secure the provider most capable of providing the services specified in this RFP and its Annexes. The principle applied to the selection is: best price for best service proposal. Selection of the provider will be made solely on the basis of the most responsive proposal submitted by a qualified proposer that satisfies all services and products described in this RFP. iMMAP reserves the right to enter into an agreement based upon initial offers received. Proposals submitted should follow Annex I-Format of Proposal.

The criteria for the evaluation process will be weighted as follows:

70% = 70 points on technical evaluation
30% = 30 points on financial evaluation
100% total

Minimum scores of the Technical Evaluation:

60% of 70 points for technical evaluation = 42 points
Proposers scoring 42 points and above will qualify for the financial evaluation.

Technical Evaluation Scoring Points (70 points):

- 1- Overall Response (10 points):
- 2- Organization Experience (25 points)
- 3- Proposed methodology and approach (35 points).

Financial Evaluation Scoring Points (30 Points):

Proposer shall follow the requirements in Annex III-Financial Proposal and specify the prices using the tables in Annex III-Financial Proposal.

6.3 Announcement of selected provider

The RFP Coordinator will notify the successful proposer and proceed to negotiate terms for final agreement. Unsuccessful proposers will be notified by email accordingly.

ANNEX I-Format of Proposal

Proposers are encouraged to follow this format.

Proposals must be attached in two sealed separate envelopes, one financial and one technical to the following address:

iMMAP MENA Regional Office – building #145-Al Hussieni Complex office 3rd Floor, Office number 309, Makkeh Street, Amman, Jordan

No later than 24 October 2021 at 04:00 pm.

Proposer is requested to include a half page value statement indicating why they are the most suitable to carry out the assignment.

Name of Proposing Organization:	
Country of Registration:	
Type of Legal entity:	
Name of Contact Person for this Proposal:	
Address:	
Phone:	
E-mail:	

Section A: Expertise and Capability of Proposer

1.1 Executive Summary

This section should serve to introduce the purpose and scope of the proposal. It should include administrative information including, at a minimum, response date, proposer contact name and phone number, and the stipulation that the proposal is valid for a time period of **120 days** from the date of submission. This section should also include a summary of the proposer's qualifications and ability to meet iMMAP's overall requirements.

1.2 Organizational architecture, Corporate Qualifications and Management Support

- The proposer should give a brief description of their company, including a brief history, structure and organization, and number of years in business.
- The proposer should provide detailed information regarding its ability to perform the work requested in this RFP. The proposer should discuss its resources that will be available to work on this project in order to meet time restraints and desired performance levels. The proposer should describe the qualifications and experience of the key personnel who will be assigned to this project.

1.3 Adverse judgements or awards

The proposer should include reference to any adverse judgements or awards.

1.4 General organizational capability

- Outline General Organizational Capability which is likely to affect performance. (i.e. size of the organization, strength of project management support, project management controls, networking).
- Include a description of past and present experiences and relationships that have a direct relationship to the performance of the Article 2.0-Deliverables. Include relevant collaborative efforts the organization may have participated in.
- Explain any partnerships with local or other organizations relevant to the performance of the Article 2.0-Deliverables. Special attention should be given to providing a clear picture of roles, responsibilities, reporting lines and accountability. Letters of commitment from partners and an indication of whether some or all have worked together previously.

1.5 Quality assurance procedures, risks and mitigation measures

- Describe the potential risks for the performance of the Article 2.0-Deliverables that may impact achievement and timely completion of expected results as well as their quality. Describe measures that will be put in place to mitigate these risks. Provide any relevant certificate(s) for accreditation of processes, policies, e.g. ISO.

1.6 Relevance of specialized knowledge and experience on similar projects

- Detail any specialized knowledge that may be applied to the performance of the Article 2.0-Deliverables. Include experiences in the region.
- Describe the experience of the organization in performing similar goods/services/works. Experience with other INGOs, UN organizations, major multilateral entities, or bilateral programs is highly desirable.
- Provide at least three references:

Project	Client Name	Contract Value in JOD	Period of performance (from/to)	Role in relation to the task undertaken to goods/services/works	Reference Contact Details (Name, Position, Phone #, Email Addresses)
1-					
2-					
3-					

1.7 Duty of care

- Describe Duty of Care mechanisms that will be put in place with regards to the staff involved in the project proposal as well as the sources and information security.
- Describe how the organization ensures accountability towards affected personnel involved in this project implementation. Duty of care consists of the partner's policies that are put in place, including but not limited to:
 - Avoiding any foreseen potential risks that can affect the methodology and/or timeline of the project.
 - Data confidentiality and information security.
 - Adhere to the audit deadlines requested by iMMAP.

Section B: Proposed Work Plan and Approach

2.1 Approach and methodology

- Provide a description of the organization's approach, methodology, and timeline for how it will achieve the Article 2.0-Deliverables.
- Explain the organization's understanding of needs for the goods/services/works.

2.2 Management – timeline, deliverables and reporting

- Provide a detailed description of how the management for the requested goods/services/works will be implemented in regard to the Article 2.0-Deliverables.

2.3 Environment-related approach to the service/work required

- Provide a detailed description of the methodology for how the organization/firm will achieve the Article 2.0-Deliverables of the project.

Section C: Resource Plan, Key Personnel

- 3.1** Describe the availability of resources in terms of personnel and facilities required for the Article 2.0-Deliverables.
- 3.2** Describe the structure of the proposed team/personnel, and the work tasks (including supervisory) which would be assigned to each team member. A chart illustrating the organization of the team structure, should be submitted along with a brief summary of the coordinators/personnel experience.
- 3.3** Provide a description of the team's level of experience in Tax and Social Security Consultancy and Auditing in a short summary.

ANNEX II-CERTIFICATION STATEMENT

The undersigned hereby acknowledges Proposer has read and understands all requirements and specifications of the Request for Proposals (RFP), including attachments.

OFFICIAL CONTACT: iMMAP requests that the Proposer designate one person to receive all documents and the method in which the documents are best delivered. Identify the contact's name and fill in the information below:

Date: _____ Official Contact Name: _____

A. E-mail Address: _____

B. Mail Address: _____

Proposer certifies that the above information is true and grants permission to iMMAP to contact the above-named person or otherwise verify the information provided.

By its submission of this proposal and authorized signature below, the Proposer certifies that:

- (1) The information contained in its response to this RFP is accurate.
- (2) Proposer complies with each of the mandatory requirements listed in the RFP and will meet or exceed the functional and technical requirements specified therein.
- (3) Proposer accepts the procedures, evaluation criteria, and all other administrative requirements set forth in this RFP.
- (4) Proposer's quote is valid for at least **120 days** from the date of proposer's signature below.
- (5) Proposer understands that if selected as the successful proposer, the Proposer will have five (5) business days from the date of delivery of final agreement in which to complete agreement negotiations, if any, and execute the final agreement document.

Authorized Signature: _____

Typed or Printed Name: _____

Title: _____

Company Name: _____

Address: _____

City: _____

Annex: III-Financial Proposal

The financial proposal should be developed and delivered in a separate envelop, with the following in mind:

The offered cost should include the following:

1- Tax and Social Security Consultancy Costs:

##	Service	Cost per year exclusive in JOD	Cost per year inclusive in JOD
1	Tax Consultancy		
2	Social Security Consultancy		

2- Audit Costs:

A-Annual Audits

##	Service	Cost per year exclusive in JOD	Cost per year inclusive in JOD
1	Annual audit		

B- iMMAP Projects Audit

##	Project Expenditures USD	Cost per project audit exclusive in JOD	Cost per project audit inclusive in JOD
1	0-500,000		
2	500,001-750,000		
3	750,001 – 1,000,000		
4	1,000,001 -2,000,000		

Failing to follow the above pricing structure will affect the financial scoring evaluation.