

United Nations Development Programme

Programme of Assistance to the Palestinian People

برنامج الأمم المتحدة الإنمائي/ برنامج مساعدة الشعب الفلسطيني



REQUEST FOR QUOTATION (RFQ)

RFQ-2010-089

Training of Trainers for 20 Ministry of Finance (MoF) staff to deliver training on property valuation and property tax collection for MoF and municipality property tax staff.

Dear Sir/Madam,

1. UNDP/PAPP is seeking qualified firms for training of trainers for 20 MoF staff to deliver training on property valuation and property tax collection for MoF and Municipality property tax staff as detailed in this RFQ. You are therefore invited to submit a quotation in accordance with the terms and conditions included in this Solicitation Document.
2. It is required that quotations should be submitted in two separate sealed envelopes, one containing the technical quotation and one the financial quotation.
3. The separate sealed envelopes should be delivered to the following address no later than 25 August, 2010 at 11:00hrs (Jerusalem time) clearly marked as follows:

**Khaled Shahwan
UNDP/PAPP
Sateh Marhaba – Al Nakoureh Street
Al Biereh**

The outer envelope should be clearly marked with the title "RFQ – training of trainers for 20 MoF staff to deliver training on property valuation and property tax collection for MoF and Municipality property tax staff".

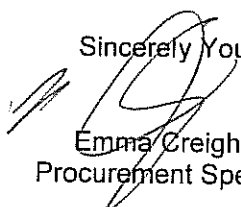
A pre-bid meeting is to be held on 16 August 2010 at 11:30 am at the UNDP/PAPP office in Al Biereh, Sateh Marhaba – Al Nakoura Street.

Any request for clarification related to this RFQ should be submitted in writing to Proc2.papp@undp.org no later than 18 August 2010. Answers to any clarifications received Will be posted in writing on 20 August 2010 at the UNDP/PAPP web site as follows:

www.undp.ps/en/aboutundp/forms/html

4. It is requested that receipt of this letter is acknowledged and to indicate whether or not you intend to submit a proposal.

Sincerely Yours,


Emma Creighton
Procurement Specialist

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Terms of Reference (ToR)

Training of Trainers for 20 MoF staff to deliver training on property valuation and property tax collection for MoF and municipality property tax staff.

I. Background

In 1994 and upon the establishment of the Ministry of Local Government, the number of municipalities rose from 30 to 133 in the oPt. (108 in the West Bank and 25 in Gaza Strip) which is more than four times the number of municipalities that the property tax staff capacities can serve while moderate efforts were exerted to enhance and develop the property tax staff capacities in order to be able to meet the challenges of serving the increased number of municipalities in the oPt. Property tax is based on the valuation of properties in oPt the last properties' valuation took place in the year 1985 in 30 existing municipalities at that time (prior to the establishment of the Palestinian Authority). It is considerably noted that the value of the properties in oPt rose significantly ever since.

The Jordanian property tax law no. 11 for 1954 was designed to collect the property tax from within the municipal boundaries only. The property tax staff capacities and resources were designed to serve 30 municipalities that existed in the oPt., prior to the establishment of the Palestinian Authority 1994.

One of the major property tax operations is the valuation of properties that tax is based on. The last valuation of properties in oPt was carried out in 1985 in the already existed 30 municipalities at the time where the value of the properties in the oPt rose significantly ever since.

In 2008 the property tax department at the Ministry of Finance have had put forward an ambitious plan (2008-2011) to conduct the comprehensive valuation of the properties in 133 municipalities in order to update its record of the property value and to enable the collection of the tax for the first time in the municipalities that were created by the PA since its establishment.

In March 2008, The UNDP Local Governance Support Programme with funding from the Government of Japan and upon an official request from the Prime Minister (Minister of Finance at the same time) has begun extensive efforts in helping the Ministry of Finance to collect more property tax for local governments. UNDP has provided the Ministry's Department for Property Tax with field vehicles, computers, capacity development, software, and more staff in order to conduct an assessment of property values throughout the West Bank. Also conducted a comprehensive assessment of the Ministry's property tax operations in order to identify and provide widespread improvements to those operations. Finally, the assessment will identify policy recommendations to revise the law on property tax as well as harmonize the approach taken in Gaza and the West Bank.

As a result of the first phase of the project (2008), properties were revaluated in 34 municipalities that resulted in a significant raise in the collections in 2009 which enabled MoF to transfer the LGUs share of the collected tax that formed around 40-50% of the annual LGUs budget such as in the case of Al-Bireh Municipality where the property tax transfers formed 47% of its 2008 budget.

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The project is planned for three years (2010-2013) and essentially focuses on interventions of technical assistance to conduct a comprehensive revision of the existing property tax legal frames towards unifying laws in the West Bank and Gaza, allowing collection of property taxes from all 483 LGUs, allowing a better degree of fiscal decentralization through enabling LGUs to play an advanced role in the property tax operations, and develop the capacities of the property tax department staff in both LGUs and MoF to be able to carry out valuation of the properties in all municipalities in order to be able to collect the tax yet to increase revenues for LGUs.

II. Objectives

Taking into consideration the limited technical expertise at both MoF and Municipalities with regards to the different property tax operations, the project is aiming at developing the capacities of selected property tax staff at MoF to enable them to deliver ToT to their colleagues at property tax departments and to develop the capacities of the property tax staff at 133 municipalities on property tax operations and activities during the project's life cycle and yet to expand these services to the rest of local governments (350) in order to pave the road for LGUs to enable a better degree of decentralization once it is allowed in the new legal frame to be revisited and developed.

III. Scope of Work

UNDP is seeking a qualified supplier who can develop and deliver Training of Trainers (ToT) to 20 MoF staff on property valuation, design and implementation of public awareness campaigns, communication with public and community liaison and property tax law, procedures, operations, and to train them on communication skills including, inter-organizational communication skills and with public community, to then enable the trained trainers to train further staff of MoF and selected staff from 133 municipalities.

Under the technical guidance of the Public Taxation Project Manager, the firm will undertake the following duties:

- 1- Assign a Team Leader who will be the suppliers' focal point for the project.
 - 2- Conduct a literature review of the following documents:
 - Jordanian Property Tax Law no. 11 for 1954,
 - Property Tax Procedures Manual,
 - UNDP Assessment Study and any other related documents,
 - 3- Prepare Training Manual to be used by the firm to conduct the ToT for 20 MoF staff.
 - 4- Conduct Training of Trainers for 20 MoF Staff members on training skills,
 - 5- Revise, amend, and finalize the Training Manual upon trainees feedback
 - 6- Develop, jointly with the 20 MoF trained staff, a final Arabic version of the ToT Training Manual to be used by trained MoF staff to conduct the ToT for their colleagues and the selected municipal staff. The final copy of the ToT training manual is to be submitted in hard and soft copies.
 - 7- Jointly, with the trainees, develop a training manual (trainees material) on the property tax activities and operations for the trained trainers to be used in training other MoF and municipal property tax staff. The Training Manual is to be submitted in hard and soft copies.
 - 8- Submit a detailed final report on the task including trainees' attendance, evaluation for each trainee, training material, training evaluation and recommendations in hard and soft copies.
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United Nations Development Programme

Programme of Assistance to the Palestinian People

برنامج الأمم المتحدة الإنمائي / برنامج مساعدة الشعب الفلسطيني



9- Recommend, upon Trainees' final evaluation, the qualified trained staff to be a ToT trainer within the MoF.

IV. Deliverables

The contract is anticipated to be completed within sixteen **(16 weeks)** of contract signature. A detailed work plan should be submitted including the activities required to complete the project and timetable for each ToT work day. The key activities required are listed below. The supplier should ensure that a work plan submitted in response to this RFQ including, but not limited to the items listed below as minimum requirement:

- (a) Detailed work plan to be approved by UNDP/LGSP Public Taxation Project Manager and subject of the final endorsement of the UNDP Local Governance Chief Technical Advisor following signature of contract.
- (b) Developing a training manual to be used by the firm in conducting the ToT for 20 MoF staff.
- (c) Complete training of 20 MoF staff.
- (d) Develop, after revising and amending the training manual with the 20 MoF trained staff, a final Arabic version of the ToT Training Manual to be used by trained MoF staff to conduct the ToT for their colleagues. The final copy of the ToT training manual is to be submitted in hard and soft copies.
- (e) A detailed final report in two copies, one hard and one soft on the task including:
 - Trainees' attendance,
 - Evaluation for each trainee,
 - Training material,
 - Training evaluation and recommendations.
- (f) A final recommendation based upon the trainees' attendance and evaluation to nominate the most qualified MoF trained staff to be a ToT trainer.
- (g) Develop a Training Manual (trainee's manual or material) on the property tax activities and operations for the trained trainers to be used in training other MoF and municipal property tax staff. The Training Manual is to be submitted in hard and soft copies.

A report should be submitted following completion of each milestone, which will be verified and approved by the UNDP/LGSP Public Taxation Project Manager and subject of final endorsement by the Chief Technical Advisor/LGSP.

The supplier can also propose a payment schedule for services rendered against milestones within the work plan. UNDP reserves the right not accept the proposed payment schedule and to negotiate this with the successful supplier prior to contract signing.

United Nations Development Programme

Programme of Assistance to the Palestinian People

برنامج الأمم المتحدة الإنمائي / برنامج مساعدة الشعب الفلسطيني



V. Qualifications

The supplier should demonstrate a proven track record in successfully delivering training of trainers and capacity to undertake the project and as such it is required that the supplier has a minimum of 2 years experience in provision of services similar to requested in this RFQ. A copy of latest similar work is to be attached to the proposal.

A multi-disciplinary team should be assembled to undertake this project, which should include staff with capacity in Public Taxation, Public Finance, Property Tax Law, Property Evaluation, Fiscal decentralization System and Communication skills.

The number of personnel required undertaking the requirements as detailed in this RFQ should be decided by the prospective supplier; however the following minimum staff is required:

- Team Leader
- Property Tax Expert,
- Valuation Expert,
- Communication and public awareness Expert.

It is required that all staff has a minimum post-graduate degree in a relevant field and a minimum of 5 years relevant experience.

VI. Technical Proposal

The following documents are required to be submitted in the technical proposal in one sealed envelope, clearly marked as "Technical Proposal". No financial information should be included:

- a) Company Profile, including description of company facilities
- b) List of projects undertaken within the last 2 years that are related to this requirement
- c) Contact of 3 previous clients that can be used for reference purposes to whom a project has been completed for training services in a similar size and complexity as this requirement
- d) Staffing Plan and profile of each staff included in the plan
- e) CV's of the 4 key staff members as specified in point V of this TOR
- f) Work Plan, including key milestones
- g) Examples of training material that has been developed for previous clients
- h) Methodology including the following points:
 - o How training will be developed and implemented to cover all required elements
 - o How Training Manuals will be developed.
 - o How communication skills such as public campaign, communication with public and community liaison will be incorporated.
 - o How participants will be evaluated to ensure that they have the skills to train other MoF and municipal staff

The quotation should be valid for a minimum of 120 days from the date bid closing and should be duly signed by the official representation of your organization and stamped.

United Nations Development Programme

Programme of Assistance to the Palestinian People

برنامج الأمم المتحدة الإنمائي / برنامج مساعدة الشعب الفلسطيني



VII. Evaluation Process

Evaluation will be undertaken by first evaluating the technical proposals. In order for proposals to be considered technically compliant, the technical evaluation score must exceed the minimum as shown below:

No	Description	Minimum Score required	Maximum score attainable
A	Technical proposal	49	70
B	Financial proposal	n/a	30
TOTAL			100

Proposals not attaining the minimum technical score will be considered technically non-compliant and disqualified. Financial Proposals will only be opened if the technical proposal attains the required minimum score.

Weightings that will be applied in order to evaluate technical and financial proposals are shown in the above table.

The following criteria will be used to evaluate the technical proposals:

No	Criteria	Maximum Score	Sub Total
1	Expertise of Firm /Organization Submitting Proposal	15	
	a Does the Company Profile reflect the requirements of the TOR?		2
	b Do projects undertaken within the last 2 years relate to the TOR? (Minimum 2 years experience in provision of similar services to TOR)		3
	c Quality of References provided by 3 previous clients		5
d Quality of examples of training material		5	
2	Staffing Plan	20	

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No	Criteria	Maximum Score	Sub Total
	a	Is overall staffing plan sufficient to undertake TOR?	5
	b	Are profiles of each staff adequate to undertake TOR?	5
	c	Team Leader (minimum post-graduate degree & 5 years relevant experience)	2.5
	d	Legal and Property Tax Expert , specializing in public taxation and fiscal decentralization (minimum post-graduate degree & 5 years relevant experience)	2.5
	e	Valuation Expert, (minimum post-graduate degree & 5 years relevant experience)	2.5
	f	Communication Expert (minimum post-graduate degree & 5 years relevant experience)	2.5
3	Work Plan including key milestones		10
	a	Work plan clearly demonstrates what will be undertaken at each phase	5
	b	Project will be completed within the time specified in the TOR?	5
4	Methodology		25
	a	Clearly illustrates how training will be developed to cover all required elements	10
	b	Clearly illustrates how training in communication skills will be conducted.	5
	c	Clearly illustrates how participants will be evaluated to ensure that they have the skills to train other MoLG staff	5
	d	Clearly illustrates how the training manual will be developed and finalized.	5

Maximum Total Score

70

United Nations Development Programme

Programme of Assistance to the Palestinian People

برنامج الأمم المتحدة الإنمائي/ برنامج مساعدة الشعب الفلسطيني



VIII. Financial Proposal

In a separate envelope the financial proposal should be submitted that consists of the following documents:

- Lump sum amount for provision of requirement
- Lump sum should be broken down to show the following level of detail:
 - o Daily rates of staff
 - o Administrative costs
 - o Overhead and profit
 - o Any other applicable costs
- Proposed payment schedule linked to the work plan submitted in the technical proposal

The price score for the financial proposal will be calculated in the following manner:

Where "x" is the price of the lowest proposal

And "y" is the price of any other proposal,

The percentage score for price allocated to the lowest proposal will be 100 points, and to any other proposal x/y times 100.

The General mark or combined score for each proposal will be arrived as follows:

The score of the Technical proposal multiplied by 70% will be added to the Financial Proposal score multiplied by 30%. The firm whose proposal received the highest combined will be the successful bidder.
