

30 September, 2018

Request for Proposals # 11  
Jordan Tourism Board Tourism Brand Review & Development

Dear Sir or Madam,

Chemonics International Inc. (hereinafter referred to as “Chemonics”), under the Building Economic Sustainability through Tourism Project, USAID Contract No. AID-278-C-15-00010, is issuing a Request for Proposals (RFP) for the review of the existing Jordan Tourism Board (JTB) brand and the development of a new one. The attached RFP contains all the necessary information for interested Offerors.

Critical to the success of the JTB’s three-year strategy is the repositioning of Jordan’s tourism brand to increase its power to transcend the misperceptions about Jordan and reflect the tourism offerings available to travellers. While the existing brand marque has served the JTB and Jordan’s tourism industry well in terms of brand recognition, research now confirms that the brand needs to work harder to overcome misperceptions.

Companies or organizations should indicate their interest in submitting a proposal for the anticipated subcontract by sending an email indicating their intention to the Procurements Department at [procurements@siyaha.org](mailto:procurements@siyaha.org) by 4:00pm (Jordan time) on 4 October, 2018.

Chemonics realizes that Offerors may have additional questions after reading this RFP. Interested Offerors can submit their questions to Procurements Department according to the instructions in 1.8 of the RFP. If necessary, Chemonics will provide answers to all relevant questions received.

This RFP does not obligate Chemonics to execute a subcontract nor does it commit Chemonics to pay any costs incurred in the preparation and submission of the proposals. Furthermore, Chemonics reserves the right to reject any and all offers, if such action is considered to be in the best interest of Chemonics.

Sincerely,

Procurements Department  
USAID Building Economic Sustainability through Tourism Project

Request for Proposals

RFP # 11

For the provision of

*Jordan Tourism Board Tourism Brand Review & Development*

Contracting Entity:

**Chemonics International Inc.**

Al Reem Center, Wadi Saqra, Arar St., Building no. 244  
Amman, Jordan

Funded by:

United States Agency for International Development (USAID) Jordan

Prime Contract Number Contract Number AID-278-C-15-00010

**\*\*\*\*\* ETHICAL AND BUSINESS CONDUCT REQUIREMENTS \*\*\*\*\***

Chemonics is committed to integrity in procurement, and only selects suppliers based on objective business criteria such as price and technical merit. Chemonics expects suppliers to comply with our Standards of Business Conduct, available at <https://www.chemonics.com/our-approach/standards-business-conduct/>.

Chemonics does not tolerate fraud, collusion among offerors, falsified proposals/bids, bribery, or kickbacks. Any firm or individual violating these standards will be disqualified from this procurement, barred from future procurement opportunities, and may be reported to both USAID and the Office of the Inspector General.

Employees and agents of Chemonics are strictly prohibited from asking for or accepting any money, fee, commission, credit, gift, gratuity, object of value or compensation from current or potential vendors or suppliers in exchange for or as a reward for business. Employees and agents engaging in this conduct are subject to termination and will be reported to USAID and the Office of the Inspector General. In addition, Chemonics will inform USAID and the Office of the Inspector General of any supplier offers of money, fee, commission, credit, gift, gratuity, object of value or compensation to obtain business.

Offerors responding to this RFP must include the following as part of the proposal submission:

- Disclose any close, familial, or financial relationships with Chemonics or project staff. For example, if an offeror's cousin is employed by the project, the offeror must state this.
- Disclose any family or financial relationship with other offerors submitting proposals. For example, if the offeror's father owns a company that is submitting another proposal, the offeror must state this.
- Certify that the prices in the offer have been arrived at independently, without any consultation, communication, or agreement with any other offeror or competitor for the purpose of restricting competition.
- Certify that all information in the proposal and all supporting documentation are authentic and accurate.
- Certify understanding and agreement to Chemonics' prohibitions against fraud, bribery and kickbacks.

Please contact Chief of Party with any questions or concerns regarding the above information or to report any potential violations. Potential violations may also be reported directly to Chemonics at to [BusinessConduct@chemonics.com](mailto:BusinessConduct@chemonics.com) or by phone/Skype at 888.955.6881.

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**List of Acronyms**

BEST	Building Economic Sustainability through Tourism
CFR	Code of Federal Regulations
CO	USAID Contracting Officer
COP	Chief of Party
COR	USAID Contracting Officer's Representative
CV	Curriculum Vitae
FAR	Federal Acquisition Regulations
JTB	Jordan Tourism Board
MoTA	Ministry of Tourism and Antiquities
M&E	Monitoring and Evaluation
NICRA	Negotiated Indirect Cost Rate Agreement
NGO	Nongovernmental organization
RFP	Request for Proposals
SAF	Strategic Activities Fund
U.S.	United States
USAID	U.S. Agency for International Development
USAID/Jordan	USAID Mission in Jordan
USG	U.S. Government
VAT	Value Added Tax

## **Section I. Instructions to Offerors**

### **I.1. Introduction**

Chemonics, the Buyer, acting on behalf of the U.S. Agency for International Development (USAID) and the Building Economic Sustainability through Tourism Project (BEST), under contract number AID-278-C-15-00010 is soliciting offers from companies and organizations to submit proposals to participate with BEST to review the existing Jordan Tourism Board (JTB) brand and develop a new one.

Critical to the success of the three-year strategy that BEST supported is the repositioning of Jordan's tourism brand to increase its power to transcend the misperceptions about Jordan and reflect the tourism offerings available to travellers. While the existing brand marquee has served the JTB and Jordan's tourism industry well in terms of brand recognition, research now confirms that the brand needs to work harder to overcome misperceptions.

The current Jordan brand 'Visit Jordan' is considered one-dimensional and speaks to a geographically-identified audience only. The new Jordan brand is expected to be multifaceted and fully aligned with the JTB strategy, speaking to motivations-based target audiences per market and market segment. The new brand should also focus on Jordan's core target market; the 'intrepid traveller'. This target segment is extensively defined in the JTB strategy among the most adventurous, resilient, and highly engaged in tourism experiences.

To that end, the JTB, supported by BEST, is pursuing a more disciplined and contemporary brand to inspire and attract travellers to choose Jordan, despite challenges of misperception. Communication guidelines will also be developed, taking into consideration core values, attributes, and reasons for travel.

Chemonics will issue an award to one company or organization. The award will be in the form of a firm fixed price subcontract (hereinafter referred to as "the subcontract". The successful Offeror shall be required to adhere to the statement of work and terms and conditions of the subcontract.

Offerors are invited to submit proposals in response to this RFP in accordance with **Section I: Instructions to Offerors**, which will not be part of the subcontract. The instructions are intended to assist interested Offerors in the preparation of their offer. Any resulting subcontract will be guided by Sections II.

This RFP does not obligate Chemonics to execute a subcontract nor does it commit Chemonics to pay any costs incurred in the preparation and submission of the proposals. Furthermore, Chemonics reserves the right to reject any and all offers, if such action is considered to be in the best interest of Chemonics.

Unless otherwise stated, the periods named in the RFP shall be consecutive calendar days.

### **I.2. Offer Deadline**

Offerors shall submit their offers electronically only.

Emailed offers must be received no later than 4:00pm (Jordan time) on 30 October, 2018, at the following address:

Procurements Department  
Procurements@siyaha.org

Faxed offers will not be considered.

Offerors are responsible for ensuring that their offers are received in accordance with the instructions stated herein. Late offers may be considered at the discretion of Chemonics. Chemonics cannot guarantee that late offers will be considered.

### **I.3. Submission of Offers**

Proposals must be submitted electronically only.

#### **A. Instructions for the Submission of Electronic Copies**

Separate technical and cost proposals must be submitted by email no later than the time and date specified in I.2. The proposals must be submitted to the point of contact designated in I.2.

The Offeror must submit the proposal electronically with up to 3 attachments (5 MB limit) per email compatible with MX Word, MS Excel, readable format, or Adobe Portable Document (PDF) format in a Microsoft XP environment. Offerors must not submit zipped files. Those pages requiring original manual signatures should be scanned and sent in PDF format as an email attachment.

The technical proposal and cost proposal must be kept separate from each other. Technical proposals must not make reference to pricing data in order that the technical evaluation may be made strictly on the basis of technical merit.

### **I.4. Requirements**

To be determined responsive, an offer must include all of documents and sections included in I.4.A and I.4.B.

#### **A. General Requirements**

Chemonics anticipates issuing a subcontract to a Jordanian, US or International company or organization, provided it is legally registered and recognized under the laws of the country where it is headquartered and is in compliance with all applicable civil, fiscal, and other applicable regulations. Such a company or organization could include a private firm, non-profit, civil society organization, or university.

Companies and organizations that submit proposals in response to this RFP must meet the following requirements:

- (i) Companies or organizations, whether for-profit or non-profit, must be legally registered under the laws of the country where it is headquartered upon award of the subcontract.
- (ii) Firms operated as commercial companies or other organizations or enterprises (including nonprofit organizations) in which foreign governments or their agents or agencies have a controlling interest are not eligible as suppliers of commodities and services.
- (iii) Companies or organizations, whether for-profit or non-profit, shall be requested to provide a DUNS number if selected to receive a subaward valued at USD\$30,000 or more, unless exempted in

accordance with information certified in the Evidence of Responsibility form included in the required certifications in Annex 3.<sup>1</sup>

Offerors may present their proposals as a member of a partnership with other companies or organizations. In such cases, the subcontract will be awarded to the lead company in the partnership. The leading company shall be responsible for compliance with all subcontract terms and conditions and making all partnership arrangements, including but not limited to division of labor, invoicing, etc., with the other company(ies). A legally registered partnership is not necessary for these purposes; however, the different organizations must be committed to work together in the fulfillment of the subcontract terms.

## **B. Required Proposal Documents**

### 1. Cover Letter

The offeror's cover letter shall include the following information:

- i. Name of the company or organization
- ii. Type of company or organization
- iii. Address
- iv. Telephone
- v. Fax
- vi. E-mail
- vii. Full names of members of the Board of Directors and Legal Representative (as appropriate)
- viii. Taxpayer Identification Number
- ix. DUNS Number
- x. Official bank account information
- xi. Other required documents that shall be included as attachments to the cover letter:
  - a) Copy of registration or incorporation in the public registry, or equivalent document from the government office where the offeror is registered.
  - b) Copy of company tax registration, or equivalent document.
  - c) Copy of trade license, or equivalent document.
  - d) Evidence of Responsibility Statement, whereby the offeror certifies that it has sufficient financial, technical, and managerial resources to complete the activity described in the scope of work, or the ability to obtain such resources. This statement is required by the Federal Acquisition Regulations in 9.104-1. A template is provided in Annex 3 "Required Certifications".
  - e) Applicable documents listed in I.4.A.

A sample cover letter is provided in Annex 1 of this RFP.

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<sup>1</sup> If Offeror does not have a DUNS number and is unable to obtain one before proposal submission deadline, Offeror shall include a statement in their Evidence of Responsibility Statement noting their intention to register for a DUNS number should it be selected as the successful offeror or explaining why registration for a DUNS number is not possible. Contact Dun & Bradstreet through this webform to obtain a number: <https://fedgov.dnb.com/webform> Further guidance on obtaining a DUNS number is available from Chemonics upon request.

## 2. Technical Proposal

The technical proposal shall comprise the following parts:

- Part 1: Technical Approach, Methodology and Detailed Work Plan. This part shall be between 5 and 15 pages long but may not exceed 15 pages.

Please refer to the 'Scope of Work' and 'Deliverables' sections for more details.

- Part 2: Management, Key Personnel, and Staffing Plan. This part shall be between 2 and 5 pages long but may not exceed 5 pages. CVs for key personnel may be included in an annex to the technical proposal and will not count against the page limit.

Offerors shall propose staff for the following key personnel positions necessary for the implementation of the scope of work:

- Brand development lead
  - Design / visual identity development lead
  - Communications lead
  - Any other personnel deemed necessary
- Part 3: Corporate Capabilities, Experience, and Past Performance. This part shall be between 2 and 7 pages long but may not exceed 7 pages.

Part 3 must include a description of the company and organization, with appropriate reference to any parent company and subsidiaries. Offerors must include details demonstrating their experience and technical ability in implementing the technical approach/methodology and the detailed work plan. Additionally, offerors must include 3 past performance references of similar work (under contracts or subcontracts) previously implemented as well as contact information for the companies for which such work was completed. Contact information must include at a minimum: name of point of contact who can speak to the offeror's performance, name and address of the company for which the work was performed, and email and phone number of the point of contact.

Chemonics reserves the right to check additional references not provided by an offeror.

The sections of the technical proposal stated above must respond to the detailed information set out in Section II of this RFP, which provides the background, states the scope of work, describes the deliverables, and provides a deliverables schedule.

## 3. Cost Proposal

The cost proposal is used to determine which proposals represent the best value and serves as a basis of negotiation before award of a subcontract.

The price of the subcontract to be awarded will be an all-inclusive fixed price. No profit, fees, taxes, or additional costs can be added after award. Nevertheless, for the purpose of the proposal, offerors must provide a detailed budget showing major line items, e.g. salaries, allowances, travel costs, other direct costs, indirect rates, etc., as well as individual line items, e.g. salaries or rates for individuals, different types of allowances, rent, utilities, insurance, etc. Offers must show unit prices, quantities, and total price. All items,



services, etc. must be clearly labeled and included in the total offered price. All cost information must be expressed in USD. See Annex 2 for a sample cost structure.

Because BEST is a USAID funded project and is implemented under a bilateral agreement between the Jordan and the U.S. Government, offerors must not include VAT and customs duties in their cost proposal.

The cost proposal shall also include a budget narrative that explains the basis for the estimate of every cost element or line item. Supporting information must be provided in sufficient detail to allow for a complete analysis of each cost element or line item. Chemonics reserves the right to request additional cost information if the evaluation committee has concerns of the reasonableness, realism, or completeness of an offeror's proposed cost.

If it is an offeror's regular practice to budget indirect rates, e.g. overhead, fringe, G&A, administrative, or other rate, Offerors must explain the rates and the rates' base of application in the budget narrative. Chemonics reserves the right to request additional information to substantiate an Offeror's indirect rates.

Under no circumstances may cost information be included in the technical proposal. No cost information or any prices, whether for deliverables or line items, may be included in the technical proposal. Cost information must only be shown in the cost proposal.

#### **I.5. Source of Funding, Authorized Geographic Code, and Source and Origin**

Any subcontract resulting from this RFP will be financed by USAID funding and will be subject to U.S. Government and USAID regulations.

All goods and services offered in response to this RFP or supplied under any resulting award must meet USAID Geographic Code 937 in accordance with the United States Code of Federal Regulations (CFR), 22 CFR §228, available at: <http://www.gpo.gov/fdsys/pkg/CFR-2012-title22-vol1/pdf/CFR-2012-title22-vol1-part228.pdf>.

The cooperating country for this RFP is Jordan.

Offerors may not offer or supply any products, commodities or related services that are manufactured or assembled in, shipped from, transported through, or otherwise involving any of the following countries: Cuba, Iran, North Korea, Syria. Related services include incidental services pertaining to any/all aspects of this work to be performed under a resulting contract (including transportation, fuel, lodging, meals, and communications expenses).

#### **I.6. Chronological List of Proposal Events**

The following calendar summarizes important dates in the solicitation process. Offerors must strictly follow these deadlines.

RFP announcement	30/09/18
Deadline for letter of intent	04/10/18 by 4:00pm (Jordan time)
Deadline for written questions	08/10/18 by 4:00pm (Jordan time)
Answers provided to questions/clarifications	14/10/18
Proposal due date	30/10/18 by 4:00pm (Jordan time)
Subcontract award (estimated)	15/11/18

The dates above may be modified at the sole discretion of Chemonics. Any changes will be published in an amendment to this RFP.

**Written Questions and Clarifications.** All questions or clarifications regarding this RFP must be in writing and submitted to [Procurements@siyaha.org](mailto:Procurements@siyaha.org) no later than 4:00pm (Jordan time) on 8 October, 2018. Questions and requests for clarification, and the responses thereto, will be circulated to all RFP recipients who have indicated an interest in this RFP.

Only written answers from Chemonics will be considered official and carry weight in the RFP process and subsequent evaluation. Any answers received outside the official channel, whether received verbally or in writing, from employees or representatives of Chemonics International, BEST project, or any other party, will not be considered official responses regarding this RFP.

**Proposal Submission Date.** All proposals must be received by 4:00pm (Jordan time) on 30 October, 2018. Late offers will be considered at the discretion of Chemonics.

**Oral Presentations.** Chemonics reserves the option to have select offerors participate in oral presentations with the technical evaluation committee. Interviews may consist of oral presentations of offerors' proposed activities and approaches. Offerors should be prepared to give presentations to the technical evaluation committee at the BEST office within 2 days of receiving notification.

**Subcontract Award (estimated).** Chemonics will select the proposal that offers the best value based upon the evaluation criteria stated in this RFP.

## **I.7. Validity Period**

Offerors' proposals must remain valid for 90 calendar days after the proposal deadline.

## **I.8. Evaluation and Basis for Award**

An award will be made to the offeror whose proposal is determined to be responsive to this solicitation document, meets the eligibility criteria stated in this RFP, meets the technical, management/personnel, and corporate capability requirements, and is determined to represent the best value to Chemonics. Best value will be decided using the tradeoff process.

This RFP will use the tradeoff process to determine best value. That means that each proposal will be evaluated and scored against the evaluation criteria and evaluation sub-criteria, which are stated in the table below. Cost proposals are not assigned points, but for overall evaluation purposes of this RFP, technical evaluation factors other than cost, when combined, are considered approximately equal cost factors. If technical scores are determined to be equal or nearly equal, cost will become the determining factor.

In evaluating proposals, Chemonics will use the following evaluation criteria and sub-criteria:

TECHNICAL CRITERIA	MAXIMUM POINTS
<b>1. Institutional Capability</b>	
<b>Company Background and Experience</b>	
Does the company have related experience to the project that is being tendered? Does it have knowledge related to destination branding strategy development at the level required for this work?	20
<b>Personnel / Expert Profile</b>	
Do the team members individual profiles have related working experience in the project that is being tendered?	20
<b>2. Technical Approach</b>	
<b>Technical know how</b>	
Review the description of the proposal; does it explain clearly the objective and outcomes of the project as it is stated on the TOR?	20
<b>Approach and Methodology Proposed</b>	
Review the flow of its working procedure and methodology proposed, does it fulfill the requirements of affectivity and efficiency?	25
<b>Creativity and Distinctiveness</b>	
Has the company presented a level of both creativity and practicality in approach? Does it effectively highlight Jordan's distinctive attributes?	15
<b>TOTAL</b>	<b>100 points</b>

Evaluation points will not be awarded for cost. Cost will primarily be evaluated for realism and reasonableness. If technical scores are determined to be nearly equal, cost will become the determining factor.

This RFP utilizes the tradeoff process set forth in FAR 15.101-1. Chemonics will award a subcontract to the offeror whose proposal represents the best value to Chemonics and the BEST project. Chemonics may award to a higher priced offeror if a determination is made that the higher technical evaluation of that offeror merits the additional cost/price.

### **I.9. Negotiations**

Best offer proposals are requested. It is anticipated that a subcontract will be awarded solely on the basis of the original offers received. However, Chemonics reserves the right to conduct discussions, negotiations and/or request clarifications prior to awarding a subcontract. Furthermore, Chemonics reserves the right to conduct a competitive range and to limit the number of offerors in the competitive range to permit an efficient evaluation environment among the most highly-rated proposals. Highest-rated offerors, as determined by the technical evaluation committee, may be asked to submit their best prices or technical responses during a competitive range. At the sole discretion of Chemonics, offerors may be requested to conduct oral presentations. If deemed an opportunity, Chemonics reserves the right to make separate awards per component or to make no award at all.

**I.10. Terms of Subcontract**

This is a request for proposals only and in no way obligates Chemonics to award a subcontract. In the event of subcontract negotiations, any resulting subcontract will be subject to and governed by the terms and clauses detailed in the subcontract. Terms and clauses are not subject to negotiation. By submitting a proposal, offerors certify that they understand and agree to all of the terms and clauses contained in the subcontract.

**I.11. Privity**

By submitting a response to this request for proposals, offerors understand that USAID is NOT a party to this solicitation.

## **Section II Background, Scope of Work, Deliverables, and Deliverables Schedule**

### **II.1. Background**

Home to some of the world's finest natural and man-made wonders, Jordan has a well-developed tourism industry that remains one of the most significant private sector pillars of the economy. The country has enjoyed decades of peace and political stability, but the conflicts and tensions afflicting neighbouring countries have in recent years impacted Jordan's appeal as a tourism destination.

Under the stewardship of MOTA, work is currently underway to develop the fourth national tourism strategy for Jordan – 2016-2021. The tourism trade (inbound tour operators and their counterparts in source markets) exhibited successful growth during the first and second national tourism strategy periods. Overall results for the 2011 – 2016 strategy period did not achieve target, despite the fact that yield goals were achieved (i.e. revenue per visitor).

Despite the challenges, Jordan's tourism opportunity is significant. By focusing on segments of the fast growing global intrepid traveller market, attracted to destinations with local and authentic experiences that have nature, adventure, heritage and culture, Jordan can vigorously compete with the world's top destinations.

As Jordan's national tourism organization, the Jordan Tourism Board's ability to reverse the decline, raise international demand and underpin growth requires marketing excellence.

JTB is responding by developing a three-year strategy resulting in a strong competitive differentiation for Jordan's tourism industry. The strategy will outline the marketing improvements required, provide a roadmap to execute, and detail the corporate/foundational improvements necessary to support the endeavour. Leveraging its key strengths and mitigating the challenges through this strategic approach will ensure that JTB has the marketing and corporate strategies to increase and then sustain growth, and that the Government of Jordan achieves optimal return on its investment in JTB.

Critical to the success of the new three-year strategy, is the repositioning of Jordan's tourism brand to increase its power to transcend the misperceptions about Jordan and reflect the exceptional experiences available to travellers in Jordan. While the existing brand marque has served JTB and Jordan's tourism industry well in terms of brand recognition, research now confirms that the brand needs to work harder to overcome misperceptions. It is critical to tackle the misperceptions of regional security issues, as well as segment-specific misperceptions. For example, Christian faith travellers perceive that Jordan does not offer the breadth and depth of Christian faith experiences as does Palestine and therefore Jordan only receives one night of a multi-night, multi-country visitor.

JTB is pursuing a more disciplined and contemporary strategic approach to inspire and compel travellers to choose Jordan in spite of its perceived challenges. Part of the change will be a more fastidious focus on where Jordan has or can hold a competitive advantage, targeting the right customers in the most effective markets and reaching them through the right channels. This will include a focus on Jordan's core target market called the Jordan Intrepid Traveller. This target segment, extensively defined in JTB's 3-year strategy, is amongst the most adventurous, resilient and highly engaged in tourism experiences where Jordan can compete with the best in the world.

JTB's new marketing strategy also identified MICE as a key market segment to grow. Business travel is a very lucrative travel segment where travellers have high propensity to return back to the destination as leisure travellers. Growing MICE sector can further help positioning the leisure tourism brand. JTB

developed a standalone MICE sector strategy that aims at positioning Jordan as a leading regional MICE destination.

## **READING MATERIAL**

The following list of reading material will be shared upon submission of the letter of intent, which is due on 04/10/18 by 4:00pm (Jordan time):

- JTB Marketing Strategy 2017 - 2019
- Jordan MICE Strategy
- Jordan Future Brand Research Study
- MMGY Study of North American Travelers
- JTB Brand Guidelines 2005
- JTB Digital Strategy 2016
- JTB Business Action Plan 2018
- JTB Religious Strategy

## **STATEMENT OF WORK**

For Jordan's tourism brand to work well it must be an entry point and touchstone to the essence of Jordan, the richness of its offering, the passion of its people and the spirit of its welcome. The brand and its messages need to affirm and define a selection of factors that can only be chosen after deep research and consultation with many sources.

More than a logo, Jordan's brand will also reflect the values of its newly considered target audience, source markets and their core motivations in considering Jordan as a travel destination. It will reflect the necessary emotional connection to the Jordan destination experience and differentiate Jordan from other prospective competitive countries.

## **OBJECTIVES**

- Develop a comprehensive brand strategy based on research, analysis and market needs aligned with JTB's 3-Year Strategy and market segmentation;
- Develop full articulation of the brand to include sub-brand strategies for key market segments of the JTB strategy (leisure, faith, MICE, Medical & Wellness and Adventure)
- Develop a set of branding guidelines and tools for JTB and to train tourism sector players on how to use them effectively.
- Enhance the brand to tell a story about Jordan and create inspiration for the Jordanian tourism industry and highlight the unique, local experiences.

### **II.2. Scope of Work**

The elements of this scope are as follows:

- Qualitative research to determine the essence of Jordan's competitive travel value proposition
- Measure the tenets of the current Jordan tourism brand, its goodwill and resonance and compare to alternate (including Global brand and North America version). JTB's main headquarters are in Amman, Jordan, with an additional branch located in Washington D.C. covering the North American market – this project will be developed for all of Jordan's external communications.

- Develop a distinctive brand which best reflects the travel values of the ‘Jordan Intrepid Traveler’ segmentation in core international markets, tells the brand story and its rich dimensions.
  - Develop core unique selling propositions (USP’s) for Jordan and identify key vertical (niche) market opportunities
  - Possible USP with cultural heritage, adventure, distinctive experiences/destinations and niche segments including faith-based tourism, and wellness/medical.

In undertaking the work envisaged, the team should have reference to existing materials, the current brand experience, competitive analysis, a benchmark of Jordan’s Brand versus other destinations and interviews with key stakeholders. Conclusions and findings must be clear and initial areas of opportunity identified and developed. The brand concept(s) need to be written, dimensionalized and fully explained. When the brand concept is developed and agreed, the creation and development of the brand messages will follow.

### **II.3. Deliverables**

The successful offeror shall submit all deliverables described above within 6 months of the subcontract signing.

The successful offeror shall deliver to Chemonics the following deliverables.

#### **PHASE I - BRAND ANALYSIS AND RESEARCH**

This is the phase that encompasses activities that will form the brand strategy. This phase will focus on research, consultation and analysis. Its output will be an aggregate of distilled views derived from the key management and user groups that can inform the brand strategy. It should include but is not limited to the following tasks:

- Kick-off briefing/work session with JTB senior management team to discuss the project details and goals, review process, methodology and timing, discuss the key issues, challenges and opportunities in greater detail and be briefed on the current National Tourism Strategy, JTB Marketing and MICE Strategies and marketing plans, growth targets and success metrics
- Measure the tenets of the current Jordan tourism and MICE brands, their goodwill and resonance and compare to alternate
- Define the characteristics of the brands messages aligned with Jordan Intrepid Traveler segmentation model
- Work with JTB and stakeholders to define success criteria and brand objectives
- Conduct planned briefing and work sessions of up to eight people to debate all of the brand issues, challenges and opportunities with:
  - Minister for Tourism and senior MoTA management
  - JTB senior management team
  - Selected public and private stakeholders
  - Combinations of the above
  - Conduct one-on-one interviews with JTB board members, JTB management, and other tourism stakeholders as will be later identified
  - Examine the use of branding by Jordan’s competitive set and destinations with a similar product range.

**Deliverable No. 1: State of the brand**

Phase 1 outcome will be a report and “State of the Brand” for Leisure and MICE presentation shared with JTB. A documented review/assessment which examines all relevant business plans, marketing plans, all research and strategy initiatives, advertising reviews and vision documents including:

- A documented review and assessment of the previous work, business plans, marketing plans, research and strategy initiatives, advertising reviews and vision documents
- High level comparative brand audit of 8 country brand initiatives in Jordan’s competitive set or comparable as destinations in terms of brand positioning, communications, identity, design, style, targeting and innovative marketing practices. The 8 countries are as follows:
  1. Egypt
  2. Israel
  3. Turkey
  4. Morocco
  5. U.A.E.
  6. Greece
  7. Iran
  8. Oman
- Jordan brand (leisure and MICE) review, detailing how the country is marketed today across multiple media and how branding can boost this.
- Jordan Brand Framework and Hierarchical Decision Model assessment, determining the brand performance across 8 country measures as well as the brand’s maturity (e.g., awareness, consideration to advocacy), based on existing research documents, secondary research and available data
- Comprehensive Presentation document shared during client work session containing: - Interviews and Document Review Findings - Comparative Audit - Jordan Brand Review - Jordan Country Brand Framework and Hierarchical Decision Model Performance - Initial Areas of Opportunity
- Comprehensive PPT on the key outcomes of the work in phase I that can be shared with the industry and stakeholders.

**PHASE II - DEVELOPMENT OF BRAND and SUB-BRAND STRATEGY**

Based on the findings from Phase 1 and insights from professional sources, phase II of the brand project will focus on the brand/sub-brand strategy that Jordan should deploy and use. It will include:

- The vision and mission for the Jordan brand and sub-brand;
- Advice on the development of a destination brand research program—visitor imagery, profiles and information needs
- Brand attributes essence and positioning, which will serve as the blueprint for all marketing initiatives
- The brand strategy will provide focus for tourism professionals and internal audiences, direct outbound marketing and communication efforts and articulate the voice and essence of the new/refreshed Jordan brand.

**Deliverable No. 2: Brand and sub-brand strategy**

- Brand Attributes (5 key values which together encapsulate Brand Jordan)
- Jordan brand/sub-brand positioning concepts (3 concepts including one concept based on existing wordmarque) plus basic mood boards. Each concept will depict a potential, distinct brand direction for the destination, as well as its rationale and implications (how to effectively action the positioning)



- Succinct brand/sub-brand essence of each direction, describing the positioning in 2-3 sentences
- Presentation document containing all of the above
- One round of revisions
- Revised final positioning concept and application of its extendibility over time and across ministries, if appropriate (2-3 examples of evolution and extension)

**PHASE III – DEVELOPMENT OF GLOBAL COMMUNICATIONS PLATFORM**

Based on the brand strategy developed in phase II – This third phase will focus on the creation and polishing of an initial global communications platform. The platform will consist of marketing and sales assets - both online and offline - that are fully aligned to brand and USP’s, and best resonate with the target segments. The platform will articulate the messaging and visual vocabulary of the brand. This will be shared with marketing agencies as well as used internally by JTB and MOTA.

**Deliverable No. 3: Global communications platform**

Strategy Presentation to JTB and industry – initial Global Communications Platform - high level supportive brand messaging (Up to 10 distinct messages that further dimension and articulate the brand platform, in the form of 1-3 line phrases) – no less than 7 detailed targeted messaging examples and up to 6 specific audience segments – (how the brand applies to distinct audiences or geographies), for a total of no less than 42 targeted messages - High-level messaging guidelines (do’s and don’ts, tone) - One round of revisions based on stakeholder and industry feedback after initial presentation.

- Examples of how the brand could be articulated through a variety of media, including a campaign would be very useful.

**II.4. Deliverables Schedule**

The successful offeror shall submit all deliverables described above within 6 months of the subcontract signing and is to complete the following deliverables schedule as part of the technical proposal:

<b>Deliverable Number</b>	<b>Deliverable Name</b>	<b>Due Date</b>
1	State of the brand	XX weeks after subcontract signing
2	Brand and sub-brand strategy	XX weeks after subcontract signing
3	Global communications platform	XX weeks after subcontract signing

\*Deliverable numbers and names refer to those fully described in II.3 above.

**Annex 1      Cover Letter**

[Offeror: Insert date]

[Insert name of point of contact for RFP]

[Insert designation of point of contact for RFP]

[Insert project name]

[Insert "Chemonics International Inc." or if there is a locally registered entity, use that name]

[Insert project office address]

Reference:      Request for Proposals [Insert RFP name and number]

Subject:          [Offeror: Insert name of your organization]'s technical and cost proposals

Dear Mr./Mrs. [Insert name of point of contact for RFP]:

[Offeror: Insert name of your organization] is pleased to submit its proposal in regard to the above-referenced request for proposals. For this purpose, we are pleased to provide the information furnished below:

Name of Organization's Representative	_____
Name of Offeror	_____
Type of Organization	_____
Taxpayer Identification Number	_____
DUNS Number	_____
Address	_____
Address	_____
Telephone	_____
Fax	_____
E-mail	_____

As required by section I, I.7, we confirm that our proposal, including the cost proposal will remain valid for [insert number of days, usually 60 or 90] calendar days after the proposal deadline.

We are further pleased to provide the following annexes containing the information requested in the RFP.:

[Offerors: It is incumbent on each offeror to clearly review the RFP and its requirements. It is each offeror's responsibility to identify all required annexes and include them]

- I. Copy of registration or incorporation in the public registry, or equivalent document from the government office where the offeror is registered.
- II. Copy of company tax registration, or equivalent document.
- III. Copy of trade license, or equivalent document.
- IV. Evidence of Responsibility Statement.

Sincerely yours,

\_\_\_\_\_

Signature  
[Offeror: Insert name of your organization's representative]

[Offeror: Insert name of your organization]

## **Annex 2      Guide to Creating a Financial Proposal for a Fixed Price Subcontract**

The purpose of this annex is to guide offerors in creating a budget for their cost proposal. Because the subcontract will be funded under a United States government-funded project, it is important that all offerors' budgets conform to this standard format. It is thus recommended that offerors follow the steps described below.

**Step 1: Design the technical proposal.** Offerors should examine the market for the proposed activity and realistically assess how they can meet the needs as described in this RFP, specifically in section II. Offerors should present and describe this assessment in their technical proposals.

**Step 2: Determine the basic costs associated with each deliverable.** The cost proposal should provide the best estimate of the costs associated with each deliverable, which should include labor and all non-labor costs, e.g. other direct costs, such as fringe, allowances, travel and transport, etc.

Other direct costs, i.e. non-labor, include for example the following:

1. Local travel and transportation, and associated travel expenses, if applicable,
2. Lodging and per diem expenses associated with travel, if applicable,
3. Rent
4. Utilities
5. Communications
6. Office supplies

Under no circumstances may cost information be included in the technical proposal. No cost information or any prices, whether for deliverables or line items, may be included in the technical proposal. Cost information must only be shown in the cost proposal.

**Step 3: Create a budget for the cost proposal.** Each offeror must create a budget using a spreadsheet program compatible with MS Excel. The budget period should follow the technical proposal period. A sample budget is shown on the following page.

**Step 4: Write Cost Notes.** The spreadsheets shall be accompanied by written notes in MS Word that explain each cost line item and the assumption why a cost is being budgeted as well as how the amount is reasonable.

### Sample Budget

Offerors should revise the budget line items accordingly in response to the technical and cost requirements of this RFP.

#### Design, Production and Distribution of Communication Materials for District Courts and Supreme Court BUDGET

Offeror's Names  
RFP TITLE  
RFP #

No.	Description	Quantity	Unit	Frequency	Unit	Cost per unit	Total	
<b>1</b>	<b>Design</b>							
	Annual Report	1	pack	4	court	Rp 100	Rp 400	
	Leaflet	1	ver	4	court	Rp 100	Rp 400	
							Rp -	
	Sub Total							Rp 800
<b>2</b>	<b>Production Cost</b>							
2.1	Annual Report	500	exp	4	court	Rp 100	Rp200,000	
2.2.	Leaflet	500	exp	8	court	Rp 100	Rp400,000	
	Sub Total							Rp 400,000
<b>3</b>	<b>Distribution Management</b>							
	PIC	1	pack	4	court	Rp 100	Rp 400	
							Rp -	
	Sub Total							Rp 400
<b>GRAND TOTAL</b>							<b>Rp 877,100</b>	

[Instructions: Remember to insert any specific cost guidance or requirements. Reference any applicable sections in the RFP that include cost instructions. For example, "customs duties or VAT may not be included in the cost proposal"]

**Annex 3 Required Certifications**

**52.203-2 CERTIFICATE OF INDEPENDENT PRICE DETERMINATION**

As prescribed in 3.103-1, insert the following provision. If the solicitation is a Request for Quotations, the terms “Quotation” and “Quoter” may be substituted for “Offer” and “Offeror.”

CERTIFICATE OF INDEPENDENT PRICE DETERMINATION (APR 1985)

\_\_\_\_\_ (hereinafter called the "offeror")  
 (Name of Offeror)

(a) The offeror certifies that—

(1) The prices in this offer have been arrived at independently, without, for the purpose of restricting competition, any consultation, communication, or agreement with any other offeror or competitor relating to— (i) Those prices;

(ii) The intention to submit an offer; or

(iii) The methods or factors used to calculate the prices offered.

(2) The prices in this offer have not been and will not be knowingly disclosed by the offeror, directly or indirectly, to any other offeror or competitor before bid opening (in the case of a sealed bid solicitation) or contract award (in the case of a negotiated solicitation) unless otherwise required by law; and

(3) No attempt has been made or will be made by the offeror to induce any other concern to submit or not to submit an offer for the purpose of restricting competition.

(b) Each signature on the offer is considered to be a certification by the signatory that the signatory—

(1) Is the person in the offeror’s organization responsible for determining the prices being offered in this bid or proposal, and that the signatory has not participated and will not participate in any action contrary to paragraphs (a)(1) through (a)(3) of this provision; or

(2)(i) Has been authorized, in writing, to act as agent for the following principals in certifying that those principals have not participated, and will not participate in any action contrary to paragraphs (a)(1) through (a)(3) of this provision \_\_\_\_\_ [*insert full name of person(s) in the offeror’s organization responsible for determining the prices offered in this bid or proposal, and the title of his or her position in the offeror’s organization*];

(ii) As an authorized agent, does certify that the principals named in subdivision (b)(2)(i) of this provision have not participated, and will not participate, in any action contrary to paragraphs (a)(1) through (a)(3) of this provision; and

(iii) As an agent, has not personally participated, and will not participate, in any action contrary to paragraphs (a)(1) through (a)(3) of this provision.

(c) If the offeror deletes or modifies paragraph (a)(2) of this provision, the offeror must furnish with its offer a signed statement setting forth in detail the circumstances of the disclosure.

\_\_\_\_\_  
 (Applicant)

BY (Signature) \_\_\_\_\_ TITLE \_\_\_\_\_

TYPED NAME \_\_\_\_\_ DATE \_\_\_\_\_

**52.203-11 CERTIFICATION AND DISCLOSURE REGARDING PAYMENTS TO INFLUENCE CERTAIN FEDERAL TRANSACTIONS**

CERTIFICATION AND DISCLOSURE REGARDING PAYMENTS TO INFLUENCE CERTAIN FEDERAL TRANSACTIONS (SEPT 2007)

\_\_\_\_\_ (hereinafter called the "offeror")  
(Name of Offeror)

(a) *Definitions.* As used in this provision—"Lobbying contact" has the meaning provided at 2 U.S.C. 1602(8). The terms "agency," "influencing or attempting to influence," "officer or employee of an agency," "person," "reasonable compensation," and "regularly employed" are defined in the FAR clause of this solicitation entitled "Limitation on Payments to Influence Certain Federal Transactions" (52.203-12).

(b) *Prohibition.* The prohibition and exceptions contained in the FAR clause of this solicitation entitled "Limitation on Payments to Influence Certain Federal Transactions" (52.203-12) are hereby incorporated by reference in this provision.

(c) *Certification.* The Offeror, by signing its offer, hereby certifies to the best of its knowledge and belief that no Federal appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress on its behalf in connection with the awarding of this contract.

(d) *Disclosure.* If any registrants under the Lobbying Disclosure Act of 1995 have made a lobbying contact on behalf of the Offeror with respect to this contract, the Offeror shall complete and submit, with its offer, OMB Standard Form LLL, Disclosure of Lobbying Activities, to provide the name of the registrants. The Offeror need not report regularly employed officers or employees of the Offeror to whom payments of reasonable compensation were made.

(e) *Penalty.* Submission of this certification and disclosure is a prerequisite for making or entering into this contract imposed by 31 U.S.C. 1352. Any person who makes an expenditure prohibited under this provision or who fails to file or amend the disclosure required to be filed or amended by this provision, shall be subject to a civil penalty of not less than \$10,000, and not more than \$100,000, for each such failure.

(f) Should the Offeror's circumstances change during the life of any resulting subcontract with respect to the above, the Offeror will notify Buyer immediately. \_\_\_\_\_

BY (Signature) \_\_\_\_\_ TITLE \_\_\_\_\_

TYPED NAME \_\_\_\_\_ DATE \_\_\_\_\_

**52.209-5 CERTIFICATION REGARDING RESPONSIBILITY MATTERS**

## Certification Regarding Responsibility Matters (Apr 2010)

(a)(1) The Offeror certifies, to the best of its knowledge and belief, that—

(i) The Offeror and/or any of its Principals—

(A) Are  are not  presently debarred, suspended, proposed for debarment, or declared ineligible for the award of contracts by any Federal agency;

(B) Have  have not , within a three-year period preceding this offer, been convicted of or had a civil judgment rendered against them for: commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a public (Federal, state, or local) contract or subcontract; violation of Federal or state antitrust statutes relating to the submission of offers; or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, tax evasion, violating Federal criminal tax laws, or receiving stolen property;

(C) Are  are not  presently indicted for, or otherwise criminally or civilly charged by a governmental entity with, commission of any of the offenses enumerated in paragraph (a)(1)(i)(B) of this provision;

(D) Have , have not , within a three-year period preceding this offer, been notified of any delinquent U.S. Federal taxes in an amount that exceeds \$3,000 for which the liability remains unsatisfied.

(1) U.S. Federal taxes are considered delinquent if both of the following criteria apply:

(i) The tax liability is finally determined. The liability is finally determined if it has been assessed. A liability is not finally determined if there is a pending administrative or judicial challenge. In the case of a judicial challenge to the liability, the liability is not finally determined until all judicial appeal rights have been exhausted.

(ii) The taxpayer is delinquent in making payment. A taxpayer is delinquent if the taxpayer has failed to pay the tax liability when full payment was due and required. A taxpayer is not delinquent in cases where enforced collection action is precluded.

(2) Examples.

(i) The taxpayer has received a statutory notice of deficiency, under I.R.C. § 6212, which entitles the taxpayer to seek Tax Court review of a proposed tax deficiency. This is not a delinquent tax because it is not a final tax liability. Should the taxpayer seek Tax Court review, this will not be a final tax liability until the taxpayer has exercised all judicial appeal rights.

(ii) The IRS has filed a notice of U.S. Federal tax lien with respect to an assessed tax liability, and the taxpayer has been issued a notice under I.R.C. § 6320 entitling the taxpayer to request a hearing with the IRS Office of Appeals contesting the lien filing, and to further appeal to the Tax Court if the IRS determines to sustain the lien filing. In the course of the hearing, the taxpayer is entitled to contest the underlying tax liability because the taxpayer has had no prior opportunity to contest the liability. This is not a delinquent tax because it is not a final tax liability. Should the taxpayer seek tax court review, this will not be a final tax liability until the taxpayer has exercised all judicial appeal rights.

(iii) The taxpayer has entered into an installment agreement pursuant to I.R.C. § 6159. The taxpayer is making timely payments and is in full compliance with the agreement terms. The taxpayer is not delinquent because the taxpayer is not currently required to make full payment.

(iv) The taxpayer has filed for bankruptcy protection. The taxpayer is not delinquent because enforced collection action is stayed under 11 U.S.C. 362 (the Bankruptcy Code).

(ii) The Offeror has ( ) has not ( ), within a three-year period preceding this offer, had one or more contracts terminated for default by any U.S. Federal agency.

(2) "Principal," for the purposes of this certification, means an officer, director, owner, partner, or a person having primary management or supervisory responsibilities within a business entity (e.g., general manager; plant manager; head of a subsidiary, division, or business segment; and similar positions). This Certification Concerns a Matter Within the Jurisdiction of an Agency of the United States and the Making of a False, Fictitious, or Fraudulent Certification May Render the Maker Subject to Prosecution Under Section 1001, Title 18, United States Code.

(b) The Offeror shall provide immediate written notice to the Contracting Officer if, at any time prior to contract award, the Offeror learns that its certification was erroneous when submitted or has become erroneous by reason of changed circumstances.

(c) A certification that any of the items in paragraph (a) of this provision exists will not necessarily result in withholding of an award under this solicitation. However, the certification will be considered in connection with a determination of the Offeror's responsibility. Failure of the Offeror to furnish a certification or provide such additional information as requested by the Contracting Officer may render the Offeror nonresponsible.

(d) Nothing contained in the foregoing shall be construed to require establishment of a system of records in order to render, in good faith, the certification required by paragraph (a) of this provision. The knowledge and information of an Offeror is not required to exceed that which is normally possessed by a prudent person in the ordinary course of business dealings.

(e) The certification in paragraph (a) of this provision is a material representation of fact upon which reliance was placed when making award. If it is later determined that the Offeror knowingly rendered an erroneous certification, in addition to other remedies available to the Government, the Contracting Officer may terminate the contract resulting from this solicitation for default.

PLEASE SIGN AND RETURN

Company Name \_\_\_\_\_

Signature \_\_\_\_\_ Printed Name \_\_\_\_\_  
Title \_\_\_\_\_ Date \_\_\_\_\_



## EVIDENCE OF RESPONSIBILITY

### 1. Offeror Business Information

**Company Name:** Full Legal Name

**Address:** Address

**DUNS Number:** Enter the Data Universal Numbering System reference (DUNS) assigned to the company (Instructions to Offerors: Offerors will provide their registered DUNS number for subawards valued at USD\$30,000 and above with Chemonics unless exempted. Exemption may be granted by Chemonics or based on a negative response to Section 3(a) below (ie, the offeror, in the previous tax year, had gross income from all sources under USD\$300,000). Dun & Bradstreet regulates the system and registration may be obtained online at <http://fedgov.dnb.com/webform>. If Offeror does not have a DUNS number and is unable to obtain one before proposal submission deadline, Offeror shall include a statement in their Evidence of Responsibility Statement noting their intention to register for a DUNS number should it be selected as the successful offeror or explaining why registration for a DUNS number is not applicable or not possible. Additional guidance on obtaining a DUNS number is available upon request.)

### 2. Authorized Negotiators

Company Name proposal for Proposal Name may be discussed with any of the following individuals. These individuals are authorized to represent Company Name in negotiation of this offer in response to RFP No.

List Names of Authorized signatories

These individuals can be reached at Company Name office:

Address

Telephone/Fax

Email address

### 3. Adequate Financial Resources

Company Name has adequate financial resources to manage this contract, as established by our audited financial statements (OR list what else may have been submitted) submitted as part of our response to this proposal.

If the offeror is selected for an award valued at \$30,000 or above, and is not exempted based on a negative response to Section 3(a) below, any first-tier subaward to the organization may be reported and made public through FSRs.gov in accordance with The Transparency Acts of 2006 and 2008. Therefore, in accordance with FAR 52.240-10 and 2CFR Part 170, if the offeror positively certifies below in Sections 3.a and 3.b and negatively certifies in Sections 3.c and 3.d, the offeror will be required to disclose to Chemonics for reporting in accordance with the regulations, the names and total compensation of the organization's five most highly compensated executives. By submitting this proposal, the offeror agrees to comply with this requirement as applicable if selected for a subaward.

In accordance with those Acts and to determine applicable reporting requirements, **Company Name** certifies as follows:

- a) In the previous tax year, was your company's gross income from all sources above \$300,000?

Yes  No

- b) In your business or organization's preceding completed fiscal year, did your business or organization (the legal entity to which the DUNS number belongs) receive (1) 80 percent or more of its annual gross revenues in U.S. federal contracts, subcontracts, loans, grants, subgrants, and/or cooperative agreements; **and** (2) \$25,000,000 or more in annual gross revenues from U.S. federal contracts, subcontracts, loans, grants, subgrants, and/or cooperative agreements?:

Yes  No

- c) Does the public have access to information about the compensation of the executives in your business or organization (the legal entity to which the DUNS number it provided belongs) through periodic reports filed under section 13(a) or 15(d) of the Securities Exchange Act of 1934 (15 U.S.C. 78m(a), 78o(d)) or section 6104 of the Internal Revenue Code of 1986? (FFATA § 2(b)(1)):

Yes  No

- d) Does your business or organization maintain an active registration in the System for Award Management ([www.SAM.gov](http://www.SAM.gov))?

Yes  No

#### 4. Ability to Comply

**Company Name** is able to comply with the proposed delivery of performance schedule having taken into consideration all existing business commitments, commercial as well as governmental.

#### 5. Record of Performance, Integrity, and Business Ethics

**Company Name** record of integrity is (Instructions: Offeror should describe their record. Text could include example such as the following to describe their record: "outstanding, as shown in the Representations and Certifications. We have no allegations of lack of integrity or of questionable business ethics. Our integrity can be confirmed by our references in our Past Performance References, contained in the Technical Proposal."

## **6. Organization, Experience, Accounting and Operational Controls, and Technical Skills**

(Instructions: Offeror should explain their organizational system for managing the subcontract, as well as the type of accounting and control procedure they have to accommodate the type of subcontract being considered.)

## **7. Equipment and Facilities**

(Instructions: Offeror should state if they have necessary facilities and equipment to carry out the contract with specific details as appropriate per the subcontract SOW.)

## **8. Eligibility to Receive Award**

(Instructions: Offeror should state if they are qualified and eligible to receive an award under applicable laws and regulation and affirm that they are not included in any list maintained by the US Government of entities debarred, suspended or excluded for US Government awards and funding. The Offeror should state whether they have performed work of similar nature under similar mechanisms for USAID. )

## **9. Commodity Procurement**

(Instructions: If the Offeror does not have the capacity for commodity procurements - delete this section. If the Offeror does have the capacity, the Offeror should state their qualifications necessary to support the proposed subcontract requirements.)

## **10. Cognizant Auditor**

(Instructions: Offeror should provide Name, address, phone of their auditors – whether it is a government audit agency, such as DCAA, or an independent CPA.)

## **11. Acceptability of Contract Terms**

(Instructions: Offeror should state its acceptance of the proposed contract terms.)

## **12. Recovery of Vacation, Holiday and Sick Pay**

(Instructions: Offeror should explain whether it recovers vacation, holiday, and sick leave through a corporate indirect rate (e.g. Overhead or Fringe rate) or through a direct cost. If the Offeror recovers vacation, holiday, and sick leave through a corporate indirect rate, it should state in this section the number of working days in a calendar year it normally bills to contracts to account for the vacation, holiday, and sick leave days that will not be billed directly to the contract since this cost is being recovered through the corporate indirect rate.)

## **13. Organization of Firm**

(Instructions: Offeror should explain how their firm is organized on a corporate level and on practical implementation level, for example regionally or by technical practice.)

Signature: \_\_\_\_\_

Name: \_\_\_\_\_

*One of the authorized negotiators listed in Section 2 above should sign*

Title: \_\_\_\_\_

Date: \_\_\_\_\_

**Subcontractor Size Self-Certification Form**

**Reference Number:** [enter the funding agency's solicitation or contract number]

**Project Name:** [enter full name of project]

**Primary NAICS Code:** [enter the [NAICS](#) code that best describes the work being performed under the [subcontract](#). i.e: for technical assistance provision use 541990 or management consulting use 541611. For HHE use 484210 and for GIS use 541360. The NAICS codes most commonly used by Chemonics is 541611, 541618, 541620, 541990]

**Company Name:** Full legal name

**Address:** Street address

**City, State, Zip:** City, State Zip

**DUNS Number:** [enter the [Data Universal Numbering System \(DUNS\)](#) here. Subcontractors must have a DUNS, unless exempted, as a part of receiving a subcontract with Chemonics]

**Contact Person:** Name, Title

**Contact Phone Number:** (555) 555-5555

**Type of Entity**

If you have difficulty ascertaining the business size status, please refer to SBA's website ([www.sba.gov/size](http://www.sba.gov/size)) or contact your local SBA office.

Small Business  Large Business  Nonprofit/Educational  Government  Non-US

If "Small Business" is checked above, and if applicable, please identify any additional small business designations under which the company qualifies. You may wish to review the definitions for the below categories in the Federal Acquisition Regulation 19.7 or 52.219-8 ([www.acquisition.gov/far/](http://www.acquisition.gov/far/)) to determine applicability.

Small Disadvantaged Business  8(a)  
 HUBZone  Woman Owned Small Business  
 Veteran Owned  Service Disabled Veteran Owned  
 Alaskan Native Corporation  Indian Tribe

By signature below, I hereby certify that the business type and designation indicated above is true and accurate as of the date of execution of this document, and I further understand that under 15 U.S.C. 645(d), any person who misrepresents a business' size status shall (1) be punished by a fine, imprisonment, or both; (2) be subject to administrative remedies; and (3) be ineligible for participation in programs conducted under the authority of the Small Business Act.

\_\_\_\_\_  
Signature and Title (required)

\_\_\_\_\_  
Date

\*\*\*\*\*CHEMONICS INTERNAL USE ONLY\*\*\*\*\*

HUBZone Status has been verified in the [System for Award Management database](#) or [Dynamic Small Business Database Search](#) as of \_\_\_/\_\_\_/\_\_\_ conducted by: \_\_\_\_\_.

**52.222-50 SUBCONTRACTOR CERTIFICATION REGARDING TRAFFICKING IN PERSONS COMPLIANCE PLAN (March 2, 2015)**

The Offeror/Subcontractor Certifies that:

- (1) It has implemented a compliance plan to prevent any prohibited activities identified in paragraph (b) of the clause at 52.222–50, Combating Trafficking in Persons, and to monitor, detect, and terminate the contract with a subcontractor engaging in prohibited activities identified at paragraph (b) of the clause at 52.222–50, Combating Trafficking in Persons;
- (2) The compliance plan applicable to the qualifying subcontract meets the minimum requirements set forth in subsection (h)(3) of clause 52.222-50, including the following:
  - a. An awareness program to inform subcontractor employees about the Government’s policy prohibiting trafficking-related activities, the activities prohibited, and the actions that will be taken against the employee for violations.
  - b. A process for employees to report, without fear of retaliation, activity inconsistent with the policy prohibiting trafficking in persons, including a means to make available to all employees the hotline phone number of the Global Human Trafficking Hotline at 1-844-888-FREE and its email address at [help@befree.org](mailto:help@befree.org).
  - c. A recruitment and wage plan that only permits the use of recruitment companies with trained employees, prohibits charging recruitment fees to the employee, and ensures that wages meet applicable host-country legal requirements or explains any variance.
  - d. A housing plan, if the subcontractor intends to provide or arrange housing that ensures that the housing meets host-country housing and safety standards.
  - e. Procedures to prevent agents and subcontractors at any tier and at any dollar value from engaging in trafficking in persons (including activities in paragraph (b) of this clause) and to monitor, detect, and terminate any agents, subcontracts, or subcontractor employees that have engaged in such activities.
- (3) The Offeror/Subcontractor will post the relevant contents of the compliance plan, no later than the initiation of contract performance, at the workplace (unless the work is to be performed in the field or not in a fixed location) and on the Offeror’s/Subcontractor’s Web site (if one is maintained). If posting at the workplace or on the Web site is impracticable, the Offeror/Subcontractor shall provide the relevant contents of the compliance plan to each worker in writing. The Offeror/Subcontractor agrees to inform Chemonics immediately of any credible information it receives from any source (including host country law enforcement) that alleges a contractor employee, subcontractor, subcontractor employee, or their agent has engaged in conduct that violates the policy.

(4) After having conducted due diligence, either—

- (i) To the best of the Offeror's/Subcontractor's knowledge and belief, neither it nor any of its proposed agents, subcontractors, or their agents is engaged in any such activities; or,
- (ii) If abuses relating to any of the prohibited activities identified in 52.222– 50(b) have been found, the Offeror or proposed Subcontractor has taken the appropriate remedial and referral actions.

PLEASE SIGN AND RETURN THIS CERTIFICATION TO CHEMONICS

Company Name \_\_\_\_\_

Company Address \_\_\_\_\_

Signature \_\_\_\_\_ Printed Name \_\_\_\_\_

Title \_\_\_\_\_ Date \_\_\_\_\_

**NOTE: The Subcontractor is required to recertify annually by signing this document one year from the date signed above and resending it to the Contractor.**

**Annex 4****DUNS and SAM Registration Guidance****What is DUNS?**

The Data Universal Numbering System (DUNS) is a system developed and regulated by Dun & Bradstreet (D&B) - a company that provides information on corporations for use in credit decisions - that assigns a unique numeric identifier, referred to as a DUNS number, to a single business entity. The DUNS database contains over 100 million entries for businesses throughout the world, and is used by the United States Government, the United Nations, and the European Commission to identify companies. The DUNS number is widely used by both commercial and federal entities and was adopted as the standard business identifier for federal electronic commerce in October 1994. The DUNS number was also incorporated into the Federal Acquisition Regulation (FAR) in April 1998 as the Federal Government's contractor identification code for all procurement-related activities.

**Why am I being requested to obtain a DUNS number?**

U.S. law – in particular the Federal Funding Accountability and Transparency Act of 2006 (Pub.L. 109-282), as amended by section 6202 of the Government Funding Transparency Act of 2008 (Pub.L. 110-252) - make it a requirement for all entities doing business with the U.S. Government to be registered, currently through the System for Award Management, a single, free, publicly- searchable website that includes information on each federal award. As part of this reporting requirement, prime contractors such as Chemonics must report information on qualifying subawards as outlined in FAR 52.204-10 and 2CFR Part 170. Chemonics is required to report subcontracts with an award valued at greater than or equal to \$30,000 under a prime contract and subawards under prime grants or prime cooperative agreements obligating funds of \$25,000 or more, whether U.S. or locally-based. Because the U.S. Government uses DUNS numbers to uniquely identify businesses and organizations, Chemonics is required to enter subaward data with a corresponding DUNS number.

**Is there a charge for obtaining a DUNS number?**

No. Obtaining a DUNS number is absolutely free for all entities doing business with the Federal government. This includes current and prospective contractors, grantees, and loan recipients.

**How do I obtain a DUNS number?**

DUNS numbers can be obtained online at <http://fedgov.dnb.com/webform/pages/CCRSearch.jsp> or by phone at 1-800-234-3867 (for US, Puerto Rico and Virgin Island requests only).

**What information will I need to obtain a DUNS number?**

To request a DUNS number, you will need to provide the following information:

- Legal name and structure
- Tradestyle, Doing Business As (DBA), or other name by which your organization is commonly recognized
- Physical address, city, state and Zip Code
- Mailing address (if separate)
- Telephone number
- Contact name
- Number of employees at your location



- Description of operations and associated code (SIC code found at <https://www.osha.gov/pls/imis/sicsearch.html>)
- Annual sales and revenue information
- Headquarters name and address (if there is a reporting relationship to a parent corporate entity)

### **How long does it take to obtain a DUNS number?**

Under normal circumstances the DUNS is issued within 1-2 business days when using the D&B web form process. If requested by phone, a DUNS can usually be provided immediately.

### **Are there exemptions to the DUNS number requirement?**

There may be exemptions under specific prime contracts, based on an organization's previous fiscal year income when selected for a subcontract award, or Chemonics may agree that registration using the D&B web form process is impractical in certain situations. Organizations may discuss these options with the Chemonics representative.

### **What is CCR/SAM?**

Central Contractor Registration (CCR)—which collected, validated, stored and disseminated data in support of agency acquisition and award missions—was consolidated with other federal systems into the System for Award Management (SAM). SAM is an official, free, U.S. government-operated website. There is NO charge to register or maintain your entity registration record in SAM.

### **When should I register in SAM?**

While registration in SAM is not required for organizations receiving a grant under contract, subcontract or cooperative agreement from Chemonics, Chemonics requests that partners register in SAM if the organization meets the following criteria requiring executive compensation reporting in accordance with the FFATA regulations referenced above. SAM.gov registration allows an organization to directly report information and manage their organizational data instead of providing it to Chemonics. Reporting on executive compensation for the five highest paid executives is required for a qualifying subaward if in your business or organization's preceding completed fiscal year, your business or organization (the legal entity to which the DUNS number belongs):

- (1) received 80 percent or more of its annual gross revenues in U.S. federal contracts, subcontracts, loans, grants, subgrants, and/or cooperative agreements; **and**
- (2) \$25,000,000 or more in annual gross revenues from U.S. federal contracts, subcontracts, loans, grants, subgrants, and/or cooperative agreements; **and**,
- (3) The public **does not** have access to information about the compensation of the executives in your business or organization (the legal entity to which the DUNS number it provided belongs) through periodic reports filed under section 13(a) or 15(d) of the Securities Exchange Act of 1934 (15 U.S.C. 78m(a), 78o(d)) or section 6104 of the US Internal Revenue Code of 1986.

If your organization meets the criteria to report executive compensation, the following sections of this document outline the benefits of and process for registration in SAM.gov. Registration may be initiated at <https://www.sam.gov>. There is NO fee to register for this site.

### **Why should I register in SAM?**

Chemonics recommends that partners register in SAM to facilitate their management of organizational data and certifications related to any U.S. federal funding, including required executive compensation reporting. Executive compensation reporting for the five highest paid executives is required in connection with the reporting of a qualifying subaward if:

- a. In your business or organization's preceding completed fiscal year, your business or organization (the legal entity to which the DUNS number belongs) received (1) 80 percent or more of its annual gross revenues in U.S. federal contracts, subcontracts, loans, grants, subgrants, and/or cooperative agreements; and (2) \$25,000,000 or more in annual gross revenues from U.S. federal contracts, subcontracts, loans, grants, subgrants, and/or cooperative agreements; and,
- b. The public have does not have access to information about the compensation of the executives in your business or organization (the legal entity to which the DUNS number it provided belongs) through periodic reports filed under section 13(a) or 15(d) of the Securities Exchange Act of 1934 (15 U.S.C. 78m(a), 78o(d)) or section 6104 of the Internal Revenue Code of 1986.

### **What benefits do I receive from registering in SAM?**

By registering in SAM, you gain the ability to bid on federal government contracts. Your registration does not guarantee your winning a government contract or increasing your level of business. Registration is simply a prerequisite before bidding on a contract. SAM also provides a central storage location for the registrant to supply its information, rather than with each federal agency or prime contractor separately. When information about your business changes, you only need to document the change in one place for every federal government agency to have the most up-to-date information.

### **How do I register in SAM?**

Follow the step-by-step guidance for registering in SAM for assistance awards (under grants/cooperative agreements) at: [https://www.sam.gov/sam/transcript/Quick\\_Guide\\_for\\_Grants\\_Registrations.pdf](https://www.sam.gov/sam/transcript/Quick_Guide_for_Grants_Registrations.pdf)

Follow the step-by-step guidance for contracts registrations at:  
[https://www.sam.gov/sam/transcript/Quick\\_Guide\\_for\\_Contract\\_Registrations.pdf](https://www.sam.gov/sam/transcript/Quick_Guide_for_Contract_Registrations.pdf)

*You must have a Data Universal Numbering System (DUNS) number in order to begin either registration process.*

If you already have the necessary information on hand (see below), the online registration takes approximately one hour to complete, depending upon the size and complexity of your business or organization.

### **What data is needed to register in SAM?**

SAM registrants are required to submit detailed information on their company in various categories. Additional, non-mandatory information is also requested. Categories of required and requested information include:

\* General Information - Includes, but is not limited to, DUNS number, CAGE Code, company name, Federal Tax Identification Number (TIN), location, receipts, employee numbers, and web site address.

\* Corporate Information - Includes, but is not limited to, organization or business type and SBA-defined socioeconomic characteristics.

\* Goods and Services Information - Includes, but is not limited to, NAICS code, SIC code, Product Service (PSC) code, and Federal Supply Classification (FSC) code.

\* Financial Information - Includes, but is not limited to, financial institution, American Banking Association (ABA) routing number, account number, remittance address, lock box number, automated clearing house (ACH) information, and credit card information.

\* Point of Contact (POC) Information - Includes, but is not limited to, the primary and alternate points of contact and the electronic business, past performance, and government points of contact. \* Electronic Data Interchange (EDI) Information\* - Includes, but is not limited to, the EDI point of contact and his or her telephone, e-mail, and physical address. (\*Note: EDI Information is optional and may be provided only for businesses interested in conducting transactions through EDI.)