**INDIVIDUAL CONSULTANT PROCUREMENT NOTICE**

**Country: Jordan**                                                                                    **Date: 06-Nov-2019**

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|---|---|
| **Post Title:** | Evaluation Consultant |
| **Starting Date:** | 24-Nov-2019 |
| **Duration:** | 10 working days |
| **Location:** | Amman, Jordan |
| **Project:** | Property Tax Project Phase II |

**Description of the assignment:**

Under the supervision of the Programme Manager of UNDP, the Evaluation Consultant will conduct a final evaluation of Property Tax Project Phase II.

To apply, kindly read the procurement notice, attach the following documents, and submit your application to the following email: ic.jo@undp.org

Any request for clarification must be sent to maen.oweis@undp.org. Mr. Oweis will respond by email and will send written copies of the response, including an explanation of the query without identifying the source of inquiry, to all applicants.

**Please submit above information no later than 18-Nov-2019, at 18:00 hrs. (Jordan time) by email to: ic.jo@undp.org with subject: "Property Tax II Evaluation Consultant".**

## 1. BACKGROUND

Jordan like other countries, faces financial and economic challenges that have impacted economic growth rates and reflect negatively on the level of development especially at the local level. The Government of Jordan (GoJ) is exerting maximum effort to develop the economy, ensure the best management of resources and work according to clear plans that protect the country from the repercussions of the economic crisis and enable it to achieve the highest levels of growth.

Socioeconomic vulnerabilities vary widely between the 12 governorates, especially in terms of local economic development and concentration of urbanized poverty. The GoJ's fiscal reform programme seeks to maintain fiscal stability and avert financial crises. This will be done through efficient allocation of financial resources, strengthening reliance on local recourses, more efficient and equitable collection of taxes especially by municipalities which will then enable them to achieve better living standards for citizens and fight poverty and unemployment.

As a response to these needs, UNDP Jordan through out its projects has pioneered a significant range of ICT applications to improve the lives of Jordanian citizens. In particular the 2003- 2010 UNDP project on property tax has played an outstanding role in demonstrating the role that ICT can play in enhancing development outcomes through greater transparency, convenience, revenue growth and cost reduction. In addition to that, this project has evidenced that fiscal decentralization is possible, attainable, and rewarding to both the central government and local communities. As a continuation to that; and with a budget of around $5m Property Tax Project Phase II of the aims to carry on developing an effective decentralized property tax system by devolving property tax collection at the municipal level. Moreover, Phase II of the property tax project mainly focuses on three areas: increasing compliance rate, implement a more cost- effective system, and provide a better enabling environment for property tax collection in Jordan.

The project works towards achieving objectives under the UN sustainable development framework (UNSDF), 2013-2017 namely; Improved governance to address short, and long-term development challenges. In addition to that, the project evolves around strengthening decentralization and promoting gender equality. Furthermore, the outcomes of this project works advancing towards SDG16 which works on enhancing accountability and strengthening national and subnational government effectiveness levels.

## 2. OBJECTIVES

**Objectives of Final Evaluation**

This evaluation is expected to help in determining the overall results of the project outputs. It is also expected to assess the validity, feasibility, effectiveness and efficiency of the property tax automated system, taking stock of both positive and negative experiences, and its sustainability. In this context, the evaluation will measure the success on the basis of indicators relating to each output as specified in the project document. The evaluation will also present forward looking recommendations to enhance the efficiency, effectiveness, sustainability and impact of the project, and focus strongly on presenting recommendation for future programming interventions built on lessons learnt.

## 3. SCOPE OF WORK

This evaluation should mainly focus on property tax collection interventions that UNDP Jordan Country Office implemented during the 2013-2017 CPD cycle. In relation to that, the evaluation must consider advancements made under Outcome 2 of the 2013-2017 UNDAF. Moreover, the evaluation should consider contributions towards Outcome 1 of the current UNSDF *"Jordan has institutionalized necessary policies and mechanisms for effective and inclusive participation of young people in social, cultural, economic, and political life."*.

Furthermore, the evaluation should also consider the amount of progress these interventions have delivered or should have delivered towards the SDGs; in particular SDG 16.

In assessing the Project and its alignment to the broader Project Document, the evaluation will take into consideration the following criteria:

**3.1 Relevance and appropriateness**

1. Was the project relevant, appropriate and strategic to Jordan and in particular to the Ministry of Finance "MOF", Ministry Of Municipal Affairs "MOMA"?
2. Was the project relevant, appropriate and strategic to the mandate, strategy, functions, roles, and responsibility of MOF and to the key actors within that institution?
3. Extent to which integrating a human rights and gender equality perspective was relevant to achieve the project's outcomes.

**3.2 Effectiveness and efficiency**

1. Were the actions to achieve the outputs and outcomes effective and efficient?
2. Were there any lessons learned, failures/lost opportunities? What might have been done better or differently?
3. How did the project deal with issues and risks?
4. Were the outputs achieved in a timely manner?
5. Were the resources utilized in the best way possible?
6. Were the resources (time, funding, human resources) sufficient?
7. Extent to which a human rights-based approach and a gender mainstreaming strategy were incorporated in the design and implementation of the project.

**3.3 Impact and sustainability**

1. Will the outputs/outcomes lead to benefits beyond the life of the existing project?
2. Were the actions and result owned by the local partners and stakeholders?
3. Was the capacity (individuals, institution, and system) built through the actions of the project?
4. What is the level of contribution of the project management arrangements to national ownership of the set objectives, result and outputs?
5. Were the modes of deliveries of the outputs appropriate to promote national ownership and sustainability of the result achieved?
6. The level of change in gender relations, e.g. access to and use of resources, contribution in economy, division of labor.

**3.4 Project design**

1. To what extent did the design of the project help in achieving its own goals?
2. Was the context, problem, needs and priorities well analyzed while designing the project?
3. Were there clear objectives and strategy?
4. Were there clear baselines indicators and/or benchmark for performance?
5. Was the process of project design sufficiently participatory? Was there any impact of the process?
6. Was there coherence, coordination and complementarity by the project with other donor funded activities in the field of tax collection methods?

### 3.5 Project management

1. Are the project management arrangements appropriate at the team level and project board level?
2. Was there appropriate visibility and acknowledgement of the project and donors?

## 4. STAKEHOLDERS OF THE EVALUATION

Local Collection Centers of the Ministry of Finance, Municipalities and tax payers are the main stakeholders in this evaluation. Moreover, the evaluation should be tailored towards encouraging constructive feedback from main stakeholders; in order to point out any untapped areas from stakeholder's perspective. In addition to that, the evaluation should consider the aspect of leaving no one behind with special focus on the most vulnerable groups.

### 4.1 Specific Issues to be addressed:

The evaluation team is expected to focus on the following points and any other issues considered important for the successful completion of the project:

1. The progress made towards each of the objectives and outputs of the project document.
2. Whether results to date and expected end of the project achievements are likely to meet the needs of the government, municipalities and tax payers.
3. The impact of the project on benefited municipalities.
4. The transfer of skills and knowledge to municipalities and therefore the level of sustainability.
5. The level of 'acceptance' by municipalities and property tax project staff who operate the automated system.
6. The efficiency of the operation through the automated system, including reduction of time required for clearance of services, simplified procedures.
7. The results of implementations in terms of modernization, simplification and increased revenue returns.
8. The impact of training provided by the project on municipalities staff performance.
9. Efficiency of monitoring mechanism and reporting.
10. The level of coordination between the Ministry of Finance, Ministry of Municipal Affairs, and UNDP.
11. Measures taken to ensure sustainable operations beyond project duration.
12. Any other significant issues.

### 4.2 Findings, Lessons Learned and Recommendations

1. The evaluation team will highlight performance, success, failure, strengths and weaknesses of the project to date. Identify of prioritize problems and shortcomings of the project. It is important to indicate the impact of the project on the e-government programme.
2. Lessons learned should indicate main lessons that can be drawn form the project experience.
3. Identify potential risks and advise on an exit strategy for the project
4. Recommendations should outline corrective actions required, and possible new interventions.

## 5. METHODOLOGY

Based on UNDP guidelines for evaluations, and in consultations with UNDP Jordan, the evaluation will be inclusive and participatory, involving principal stakeholders into the analysis. During the evaluation, the consultant is expected to apply the following approaches for data collection and analysis.

1. Desk review of relevant documents including progress reports and any records of the various opinion surveys conducted during the life of the Project;
2. Briefing and debriefing sessions with the former Project Technical and Steering Committees
3. Interviews with partners and stakeholders, government officials, service providers including CSO partners and donor partners, etc.
4. Review national reports relevant to fiscal reform, decentralization and e-government.
5. Field visits to pilot municipalities
6. Hold discussions with the municipality officials, Ministry of finance staff and project staff.

During the implementation of the contract, the consultant will report to the UNDP  Programme Manager, who will provide guidance and ensure satisfactory completion of deliverables. There will be in close coordination with the project team who will assist in connecting the consultant with senior management, development partners, beneficiaries and key stakeholders. In relation to that, UNDP will provide office space and access to standard office services as needed.

## 6. EXPECTED OUTPUTS AND DELIVERABLES

The consultant is expected to deliver the following outputs:

1. Inception report on proposed evaluation methodology, work plan and proposed structure of the report
2. A draft preliminary evaluation report and presentation, to be presented at a debriefing meeting with partners
3. Final report, including a 2-3 pages' executive summary, including issues raised during presentation of draft.

The Implementation Arrangements and Reporting Requirements are as follows:

|   | Output | Timeline | % of Deliverables | Target date |
|---|--------|----------|-------------------|-------------|
| 1 | Inception report on proposed evaluation methodology, work plan and proposed structure of the report | Within 5 days of contract | 40% | |
| 2 | A draft preliminary evaluation report and presentation, to be presented at a debriefing meeting with partners | After conclusion of necessary meetings | 40% | |
| 3 | Final evaluation report; Executive summary, and a presentation of major findings | Within 5 working days after receipt of comments on the draft report | 20% | |

**Notes to be considered for the implementation approach:**

- UNDP will designate a Focal Point for the evaluation and any additional staff to assist in facilitating the process (e.g., providing relevant documentation, arranging visits/interviews with key informants, etc.). The Country Office will take responsibility for the approval of the final evaluation report. The Assistant Resident Representative Programme will arrange introductory meetings within UNDP and Unit Heads to establish initial contacts with government partners and project staff. The consultant will take responsibility for setting up meetings and conducting the evaluation, subject to advanced approval of the methodology submitted in the inception report.
- The M&E Focal point will review the inception report and the draft evaluation report to provide detail comments related to the quality of methodology, evidence collected, analysis and reporting. The Focal Point will also advise on the conformity of evaluation processes to the UNEG standards. The evaluator is required to address all comments received completely and comprehensively.
- While the Country Office will provide some logistical support during the evaluation, for instance assisting in setting interviews with senior government officials, it will be the responsibility of the evaluator to logistically and financially arrange their travel to and from relevant project sites. Planned travels and associated costs will be included in the Inception Report and agreed with the Country Office

# 7. DURATION OF THE WORK

The detailed schedule of the evaluation and length of the assignment will be discussed with the Consultant prior to the assignment. The estimated duration of the Consultants' assignment is up to 10 working days.

# 8. QUALIFICATIONS OF THE SUCCESSFUL INDIVIDUAL CONTRACTOR

### 8.1 Competencies:

The candidate should be able to*:
1. Ability to work under pressure against strict deadlines
2. Ability to think out of the box
3. Ability to present complex issues persuasively and simply
4. Ability to contextualize global trends in accordance with dynamics of the operating working environment
5. Strong communication and interpersonal skills
6. Excellent writing skills and proven ability to produce quality and analytical reports within the shortest period

### 8.2 Qualifications and Professional Experience

1. Advanced university degree in Business information systems, Computer information systems, accounting, finance, or any related fields;------------ 25
2. 10 years of professional experience in fields relevant to Database Program Development; -------------25

3. Preferably 5 years of experience Applied Software Development with focus on E-Payments; -----------20
4. Previous experience as an expert in conducting financial systems evaluations----15
5. Fluency in English and Arabic, both written and spoken------ 15

**8.3 Other Attributes:**

• An understanding of and ability to abide by the values of the United Nations;

• Awareness and sensitivity in working with people of various cultural and social backgrounds;

• Display cultural, gender, religion, disability, sexual orientation, race, nationality and age sensitivity and adaptability;

• It is demanded by UNDP that Consultant is independent from any organizations that have been involved in designing, executing or advising any aspect of the intervention that is the subject of the evaluation;

• In the framework of the ethical obligations of the evaluator during the evaluation process; he/she must confirm their commitment on delivering the evaluation according to the ethical requirements of the United Nations Evaluation Group, UNEG (Ethical Guidelines);

• The main ethical areas that the evaluator should sustain during the evaluation process must evolve around the following; Independence, Impartiality, Credibility, Conflicts of Interest, Honesty and Integrity, and Accountability. More details of the evaluator ethical responsibilities can be found under the following link: http://www.unevaluation.org/document/detail/102.

**8.4 Documents To Be Included When Submitting The Proposals:**

Interested individual consultants must submit the following documents/information to demonstrate their qualifications:
1. Proposal:
(I) Explaining why they are the most suitable for the work
(ii) Provide a brief methodology on how they will approach and conduct the work.
2. Financial proposal;
3. Personal CV including past experience in similar projects and at least 3 references.

## 9. FINANCIAL PROPOSAL:

**9.1 Lump Sum Contracts**

The financial proposal shall specify a total lump sum amount including fees, travel cost (total of two weeks mission), tickets, DSAs, accommodation. While local transportations (local travel means inside each country) will be covered by the project. Payments are based upon output, i.e. upon delivery of the services specified in the TOR. In order to assist the requesting unit in the comparison of financial proposals, the financial proposal will include a breakdown of this lump sum amount.

## 10. CRITERIA FOR SELECTION OF THE BEST OFFER

The selection process will be carried out in the following manner:

1. Qualifications and technical proposal will be weighted at 70% based on the following criteria.

| Criterion | Max points |
|---|---|
| Academic background | 15 |
| Relevant professional experience | 15 |
| Knowledge and experience in international development | 10 |
| Previous working experience on similar assignments | 20 |
| Fluency in English and Arabic | 10 |

And,

2. Financial proposal will be weighted at 30%.

## Annex 1: UNDP evaluation report template and quality standards

This **evaluation report template** is intended to serve as a guide for preparing meaningful, useful and credible evaluation reports that meet quality standards. It does not prescribe a definitive section-by-section format that all evaluation reports should follow. Rather, it suggests the content that should be included in a quality evaluation report.

The evaluation report should be complete and logically organized. It should be written clearly and be understandable to the intended audience. In a country context, the report should be translated into local languages whenever possible. The report should also include the following:

**1. Title and opening pages**

should provide the following basic information:

- Name of the evaluation intervention.
- Time frame of the evaluation and date of the report.
- Countries of the evaluation intervention.
- Names and organizations of evaluators.
- Name of the organization commissioning the evaluation.
- Acknowledgements.

2. **Project and evaluation information details** to be included in all final versions of evaluation reports (non-GEF) second page (as one page):

| Project/outcome Information | | |
|---|---|---|
| **Project/outcome title** | | |
| **Atlas ID** | | |
| **Corporate outcome and output** | | |
| **Country** | | |
| **Region** | | |
| **Date project document signed** | | |
| **Project dates** | **Start** | **Planned end** |
| | | |
| **Project budget** | | |
| **Project expenditure at the time of evaluation** | | |
| **Funding source** | | |
| **Implementing party** | | |

| Evaluation information | | |
|---|---|---|
| **Evaluation type (project/ outcome/thematic/ country programme, etc.)** | | |
| **Final/midterm review/ other** | | |
| **Period under evaluation** | Start | End |

| | | |
|---|---|---|
| Evaluators | | |
| Evaluator email address | | |
| | Start | Completion |
| Evaluation dates | | |

### 3. Table of contents.

including boxes, figures, tables and annexes with page references.

### 4. List of acronyms and abbreviations.

### 5. Executive summary (four-page maximum).

A stand-alone section of two to three pages that should:
- Briefly describe the intervention of the evaluation (the project(s), programme(s), policies or other intervention) that was evaluated.
- Explain the purpose and objectives of the evaluation, including the audience for the evaluation and the intended uses.
- Describe key aspect of the evaluation approach and methods.
- Summarize principle findings, conclusions and recommendations.
- Include the evaluators' quality standards and assurance ratings.

### 6. Introduction.

- Explain why the evaluation was conducted (the purpose), why the intervention is being evaluated at this point in time, and why it addressed the questions it did.
- Identify the primary audience or users of the evaluation, what they wanted to learn from the evaluation and why, and how they are expected to use the evaluation results.
- Identify the intervention of the evaluation (the project(s) programme(s) policies or other intervention—see upcoming section on intervention).
- Acquaint the reader with the structure and contents of the report and how the information contained in the report will meet the purposes of the evaluation and satisfy the information needs of the report's intended users.

### 7. Description of the intervention.

Provides the basis for report users to understand the logic and assess the merits of the evaluation methodology and understand the applicability of the evaluation results. The description needs to provide sufficient detail for the report user to derive meaning from the evaluation. It should:

- Describe **what is being evaluated**, **who seeks to benefit** and the **problem or issue** it seeks to address.
- Explain the **expected results model or results framework**, **implementation strategies** and the key **assumptions** underlying the strategy.

- Link the intervention to **national priorities**, UNDAF priorities, corporate multi-year funding frameworks or Strategic Plan goals, or other **programme or country-specific plans and goals.**

- Identify the **phase** in the implementation of the intervention and any **significant changes** (e.g., plans, strategies, logical frameworks) that have occurred over time, and explain the implications of those changes for the evaluation.
- Identify and describe the **key partners** involved in the implementation and their roles.
- Identify **relevant cross-cutting issues** addressed through the intervention, i.e., gender equality, human rights, marginalized groups and leaving no one behind.
- Describe the **scale of the intervention**, such as the number of components (e.g., phases of a project) and the size of the target population for each component.
- Indicate the **total resources**, including human resources and budgets.
- Describe the context of the **social, political, economic and institutional factors**, and the **geographical landscape** within which the intervention operates and explain the effects (challenges and opportunities) those factors present for its implementation and outcomes.
- Point out **design weaknesses** (e.g., intervention logic) or other **implementation constraints** (e.g., resource limitations).

**8. Evaluation scope and objectives.**

The report should provide a clear explanation of the evaluation's scope, primary objectives and main questions.
- **Evaluation scope.** The report should define the parameters of the evaluation, for example, the time period, the segments of the target population included, the geographic area included, and which components, outputs or outcomes were and were not assessed.
- **Evaluation objectives.** The report should spell out the types of decisions evaluation users will make, the issues they will need to consider in making those decisions and what the evaluation will need to achieve to contribute to those decisions.
- **Evaluation criteria.** The report should define the evaluation criteria or performance standards used.[46] The report should explain the rationale for selecting the particular criteria used in the evaluation.
- **Evaluation questions** define the information that the evaluation will generate. The report should detail the main evaluation questions addressed by the evaluation and explain how the answers to these questions address the information needs of users.

**9. Evaluation approach and methods.**

The evaluation report should describe in detail the selected methodological approaches, methods and analysis; the rationale for their selection; and how, within the constraints of time and money, the approaches and methods employed yielded data that helped answer the evaluation questions and achieved the evaluation purposes. The report should specify how gender equality, vulnerability and social inclusion were addressed in the methodology, including how data-collection and analysis methods integrated gender considerations, use of disaggregated data and outreach to diverse stakeholders' groups. The description should help the report users judge the merits of the methods used in the evaluation and the credibility of the findings, conclusions and recommendations. The description on methodology should include discussion of each of the following:

- **Evaluation approach;**
- **Data sources:**
The sources of information (documents reviewed and stakeholders) as well as the rationale for their selection and how the information obtained addressed the evaluation questions.

▪ **Sample and sampling frame:**

If a sample was used: the sample size and characteristics; the sample selection criteria (e.g., single women under age 45); the process for selecting the sample (e.g., random, purposive); if applicable, how comparison and treatment groups were assigned; and the extent to which the sample is representative of the entire target population, including discussion of the limitations of sample for generalizing results.

▪ **Data-collection procedures and instruments:**

Methods or procedures used to collect data, including discussion of data-collection instruments (e.g., interview protocols), their appropriateness for the data source, and evidence of their reliability and validity, as well as gender-responsiveness.

▪ **Performance standards:**

The standard or measure that will be used to evaluate performance relative to the evaluation questions (e.g., national or regional indicators, rating scales).

▪ **Stakeholder participation:**

In the evaluation and how the level of involvement of both men and women contributed to the credibility of the evaluation and the results.

▪ **Ethical considerations:**

The measures taken to protect the rights and confidentiality of informants (see UNEG 'Ethical Guidelines for Evaluators' for more information).

▪ **Background information on evaluators:**

The composition of the evaluation team, the background and skills of team members, and the appropriateness of the technical skill mix, gender balance and geographical representation for the evaluation.

▪ **Major limitations of the methodology:**

Should be identified and openly discussed as to their implications for evaluation, as well as steps taken to mitigate those limitations.

**10. Data analysis.**

The report should describe the procedures used to analyze the data collected to answer the evaluation questions. It should detail the various steps and stages of analysis that were carried out, including the steps to confirm the accuracy of data and the results for different stakeholder groups (men and women, different social groups, etc.). The report also should discuss the appropriateness of the analyses to the evaluation questions. Potential weaknesses in the data analysis and gaps or limitations of the data should be discussed, including their possible influence on the way findings may be interpreted and conclusions drawn.

**11. Findings.**

Should be presented as statements of fact that are based on analysis of the data. They should be structured around the evaluation questions so that report users can readily make the connection between what was asked and what was found. Variances between planned and actual results should be explained, as well as factors affecting the achievement of intended results. Assumptions or risks in the

project or programme design that subsequently affected implementation should be discussed. Findings should reflect a gender analysis and cross-cutting issue questions.

**12. Conclusions.**

Should be comprehensive and balanced and highlight the strengths, weaknesses and outcomes of the intervention. They should be well substantiated by the evidence and logically connected to evaluation findings. They should respond to key evaluation questions and provide insights into the identification of and/or solutions to important problems or issues pertinent to the decision-making of intended users, including issues in relation to gender equality and women's empowerment.

**13. Recommendations.**

The report should provide practical, actionable and feasible recommendations directed to the intended users of the report about what actions to take or decisions to make. Recommendations should be reasonable in number. The recommendations should be specifically supported by the evidence and linked to the findings and conclusions around key questions addressed by the evaluation. They should address sustainability of the initiative and comment on the adequacy of the project exit strategy, if applicable. Recommendations should also provide specific advice for future or similar projects or programming. Recommendations should also address any gender equality and women's empowerment issues and priorities for action to improve these aspects.

**14. Lessons learned.**

As appropriate and/or if requested by the TOR, the report should include discussion of lessons learned from the evaluation, that is, new knowledge gained from the particular circumstance (intervention, context outcomes, even about evaluation methods) that are applicable to a similar context. Lessons should be concise and based on specific evidence presented in the report.

**15. Report annexes.**

Suggested annexes should include the following to provide the report user with supplemental background and methodological details that enhance the credibility of the report:
- TOR for the evaluation.
- Additional methodology-related documentation, such as the evaluation matrix and data-collection instruments (questionnaires, interview guides, observation protocols, etc.) as appropriate.
- List of individuals or groups interviewed or consulted, and sites visited. This can be omitted in the interest of confidentiality if agreed by the evaluation team and UNDP.
- List of supporting documents reviewed.
- Project or programme results model or results framework.
- Summary tables of findings, such as tables displaying progress towards outputs, targets and goals relative to established indicators.
- Code of conduct signed by evaluators


## Annex2: Documents to be Studied by the Evaluator "But Not Exclusively"

1. UNDP Handbook on Monitoring and Evaluation for results
2. UNDP Guidelines for Outcome Evaluators
3. Common Country Assessments

4. UN Ethical Guidelines for Evaluation
5. UNDP Results-Oriented Annual Report (ROAR)
6. Project documents and progress reports, project evaluation reports related to this evaluation
7. National Development Strategies
8. UNDP Country Programme Document (CPD) 2013 – 2017
9. UNDP Country Programme Document (CPD) 2018-2022
10. National Human Development Reports

## Annex4: Evaluation matrix (Sample Evaluation Matrix)

To be included in the inception report.

| Table A. Sample evaluation matrix | | | | | | |
|---|---|---|---|---|---|---|
| Relevant evaluation criteria | Key Questions | Specific Sub-Questions | Data Sources | Data collection Methods/ Tools | Indicators / Success Standard | Methods for Data Analysis |
| | | | | | | |
| | | | | | | |