LRPS 9200341-Annex B-
TERMS OF REFERENCE FOR SERVICE CONTRACTING

Assignment	Comprehensive Assessment of Immunization Financing and Development of a five-Year Investment Plan for Jordan's National Immunization Programme (2026–2029)
Location	(Home-based)
Duration	(6 Months Approximately months)
Estimate number of working days	(135 days)
Start date	(November 2025)
End date	(May 2026)
Reporting to	Immunization Specialist

1. JUSTIFICATION/BACKGROUND

Jordan's National Expanded Programme on Immunization (EPI), established in 1979, originally covered five antigens (Bacillus Calmette–Guérin (BCG), Diphtheria, Tetanus, Pertussis (DTP), and Oral Poliovirus Vaccine (OPV)). The country achieved universal child immunization in 1988 and has been polio-free since 1995. Over the years, the EPI program has expanded to include 12 antigens, with plans underway for the introduction of additional new underutilized vaccines yet very important for child survival.

Immunization remains one of the most cost-effective public health interventions, critical in reducing morbidity and mortality among children. The Government of Jordan, with support from Gavi and UNICEF will be introducing Pneumococcal vaccine (PCV) and other underutilized vaccines such as Human Papilloma Vaccine (HPV) and Varicella into the National Immunization Programme (NIP). As Jordan transitions toward greater self-financing of its immunization program and prepares for sustainability beyond donor support, it is essential to have a comprehensive understanding of the current financing landscape and future funding needs.

In this regard, UNICEF Jordan in collaboration with the Ministry of Health (MOH), seeks to engage a qualified consulting firm or institution to conduct critical analyses and develop comprehensive financial planning documents to guide decision-making and resource mobilization for immunization up to 2030 and beyond

2. OBJECTIVE AND TARGETS

- To conduct a comprehensive desk review of existing financial resources allocated to the immunization programme, while identifying the risk in the current funding flows and allocations
- To map and document financial contributions from both domestic and international sources, including government budgets, donor funding from international financial institutions such as World Bank, European Investment Bank (EIB), as well as through innovative financing mechanisms.
- To analyse the cost, financing structure, and projected funding gap of the National Immunization Programme (NIP) vaccines through 2030.
- To develop a five-year immunization investment plan to guide sustainable financing and resource mobilization efforts to ensure uninterrupted and equitable access to vaccines across the population groups.

3. SCOPE OF THE WORK (WORK ASSIGNMENT)

The selected firm will be responsible for the following:

a) Desk Review

- Review existing documentation, plans, and reports on immunization financing in Jordan.
- Assess past seven years (2018 to 2024) and current allocations, expenditures, and utilization of financial resources for immunization.
- Identify gaps and challenges in existing financial tracking and reporting systems.

b) Financial Resource Mapping

- Identify and document all internal (e.g., MOH budget allocations) and external (e.g., Gavi, WHO, UNICEF, World Bank, NGOs etc) sources of funding for immunization.
- Analyze the flow of resources, disbursement mechanisms, and predictability of funds.
- Explore potential innovative financing options applicable to Jordan's context.

c) Cost and Financing Analysis up to 2030

- Estimate the cost of immunization services and vaccine procurement until 2030, considering current coverage targets, new vaccine introductions, and population growth.
- Analyze current and projected funding sources against projected needs.
- Estimate funding gaps and propose potential financing scenarios or strategies for bridging them.

d) Strengthening risk analysis and mitigation

- To identify financial, operational and policy related risk that may impact immunization, financing sustainability and propose mitigation strategies.

4. EXPECTED DELIVERABLES

(Tangible and measurable outputs of work assignment to be completed upon award of contract with indicative timelines)

- An Inception report detailing the methodology, tools, and work plan.
- Desk Review report summarizing findings on financial allocations and existing funding.
- Stakeholder resource mapping report that Identifying internal and external financing sources and mechanisms.
- Cost and Financing Analysis Report (2018–2024) – Including detailed costing, financing projections, funding gaps, and sustainability recommendations.

- Final consolidated report that synthesizes all findings, recommendations, and financial forecasts presented in an actionable format. This deliverable will also include a targeted advocacy and policy brief to support stakeholder engagement, resource mobilization and strategic decision making.
- Final presentation to MOH and immunization partners.

5. REALISTIC DELIVERY DATES AND DETAILS ON HOW THE WORK MUST BE DELIVERED

(i.e. electronic submission, hard copy, what computer programme should be used)
The assignment is expected to run over 135 days, starting from the date of signing the contract. The timeline below outlines the major activities, expected deliverables, and indicative duration. However, they will be revised after signing of the contract:

Activity	Deliverables / Outputs	Time frame
Inception Phase • Kick-off meeting with UNICEF and MOH • Review TOR and clarify expectations • Refine methodology and work plan	Inception report with a detailed methodology - Refined timeline - Data collection tools and Stakeholder engagement plan	01/11/2025 to 18/12/2025
Desk Review and Situational Analysis • Collect and analyze existing financial reports, budget documents, NIP plans • Identify previous studies, bottlenecks, and gaps in immunization financing	Desk Review Report with the -Summary of current and historical financial allocations and utilization - Identified gaps and issues in current financing mechanisms	
Stakeholder Engagement Planning and Initial Consultations • Identify key stakeholders • Conduct preliminary interviews and focus group discussions • Validate desk review findings	Stakeholder Mapping Matrix Updated Inception Report (if needed)	
Financial Resource Mapping • Map domestic and external financing flows • Include Gavi, WHO, UNICEF, WB, NGOs, private sector, and government budget lines • Identify innovative financing mechanisms	Resource Mapping Report produced with funding flow charts, stakeholder matrix and analysis of financing predictability, disbursement, and tracking systems	21/12/2025 to 08/02/2026
Costing and Financial Projections (2025–2030) • Estimate cost of vaccines, service delivery, cold chain, personnel, etc. • Forecast financial requirements until 2030 using updated demographic and programmatic data • Compare available funding vs. projected needs	Financial Analysis Report: - Detailed cost estimates - Scenario modeling (baseline, scale-up, shortfall) - Funding gap analysis and sustainability projections	
Synthesis and Drafting of Comprehensive Report • Integrate findings from all components • Draft comprehensive financial sustainability report, including the risks and its mitigations strategies.	Draft Final Report submitted to UNICEF and MOH for review Draft advocacy and Policy brief for stakeholders' engagement	09/02/2026 to 25/03/2026
Stakeholder Validation Workshop • Present draft findings to key stakeholders (UNICEF, MOH, donors, partners)	Workshop Report and Comments Log	

• Solicit feedback and consensus		
Integration of Feedback and Finalization • Revise report based on workshop feedback • Final editorial review and quality assurance	Final Report (clean and tracked versions) Executive Summary Advocacy and Policy brief for stakeholders' engagement PowerPoint slides for presentation	29/03/2026 to 14/05/2026
• Submit all final reports with all the deliverables • Present final results to MOH leadership and key partners • Handover data tools and costing models	Final Presentation and Submission of: - • Five-year immunization investment • Final Report - Presentation Slides - Data Tools/Templates	

6. PAYMENT SCHEDULE

(provide proposed payment schedule based on deliverables and milestones)

Payment	Timeline Dates	Deliverables / Outputs	% Payment
1st Payment	01/11/2025 to 18/12/2025	Inception Report including: a). Detailed methodology with refined timeline b). Data collection tools c). Stakeholder engagement plan Desk Review Report with: - Summary of financial allocations/utilization - Identified gaps in financing mechanisms - Stakeholder Mapping Matrix - Updated Inception Report (if needed)	20%
2nd Payment	21/12/2025 to 08/02/2026	Resource Mapping Report including: a). Funding flow charts b). Stakeholder matrix c). Analysis of predictability, disbursement, and tracking systems d). Detailed cost estimates and financing scenario modeling e). Funding gap and sustainability analysis	20%
3rd payment	09/02/2026 to 25/03/2026	a). Draft final report and investment strategy integrating all findings submitted to UNICEF and MOH b). Workshop Report c) Advocacy and Policy Brief	20%
4th Final Payment – After Final Submission and Presentation	29/03/2026 to 14/05/2026	a) Final workshop presentation to MOH, Ministry of Finance leadership, and key partners. b) Submission of all final deliverables to UNICEF, including: • Five-year immunization investment plan developed • Final Report with recommendation and following annexes • Presentation slides • Data tools and costing templates.	40%

7. OFFICIAL TRAVEL INVOLVED

Limited official travel to various ministries, UN Agencies and other partners working and supporting immunization programme,

8. DESIRED QUALIFICATIONS, SPECIALIZED KNOWLEDGE OR EXPERIENCE

(type of institutions, area of specialization, number of years of experience in a given area, examples of similar past work, etc.)

The assignment is expected to be undertaken by an institution or firm with demonstrated experience in immunization financing, health economics, and health systems research, particularly within Jordan and/or the broader Middle East region. Proven expertise in analysing vaccine costing, fore casting, resource mobilization, and funding mechanisms for national immunization programmes will be essential. Additional experience in developing investment cases, conducting financial sustainability assessments, or advising on innovative health financing strategies will be considered an advantage. The institution should also demonstrate the capacity to manage and execute large-scale assessments involving multiple stakeholders across government and development partners. Relevant experience should be substantiated through the submission of samples of previous work and references from prior clients or contracting entities. Each vendor must fulfil the criteria outlined below to be considered eligible for subsequent stages of the evaluation process.

The firm/institution should demonstrate:

- Proven experience in public health financing, immunization costing, or health economics with a minimum of 8-10 years of relevant professional experience.
- Strong familiarity with national health systems, particularly in the Middle East and Jordan in particular.
- Ability to engage high-level stakeholders and conduct participatory consultations.
- Technical capacity to conduct cost modelling and financial gap analysis.
- Multidisciplinary team composition including health economists, public health experts, and financial analysts
- The firm/institution will submit (team profile and qualification CVs of proposed team members).

With person who have the following copies:

- Advanced university degree in relevant field: Health economics, public financial management, business studies, public administration, public health or health systems.
- At least 8 years in health economics and health financing with experience in resource-limited countries. a) Experience in all or some of the following:
  I. Cost analysis within the health sector
  II. Economic evaluation within the health sector
  III. Public Financial Management within the health sector
  IV. Resource tracking (budgets and expenditures)
  V. Development and implementation of research in health economics and health care financing
  VI. Political economy assessment in the health sector
  VII. Advocacy and resource mobilization
- Good understanding of national primary health care/immunization programs and health systems, including good understand of health financing issues related to community health and nutrition workforce.
- Interfacing with governments, global health organizations and other stakeholders and in multi-cultural setting

- Strong analytical skills and experience synthesizing information from multiple sources.
- Demonstrated ability to work independently and collaboratively.
- Ability to work in a multi-cultural environment.

9. CONTRACT MANAGEMENT

The Immunization Specialist will serve as the Contract Manager and will oversee the implementation and approval of deliverables. Payment is contingent upon approval by the Contract Manager and will be made according to the schedule outlined in the table above, and as agreed upon in the final contract. No advance payment will be made. Payments will be processed against each milestone/deliverable and only upon UNICEF's formal acceptance of satisfactorily completed work. Payment will be made upon submission of deliverables with an invoice by the firm/institution that will be reviewed and approved. All payments will be made via bank transfer in the billing currency to the account registered in UNICEF's system.

10. PERFORMANCE INDICATORS FOR EVALUATION OF RESULTS

(i.e. timeline, value of services rendered, etc.)

- Comprehensive desk review report outlining all current immunization financing sources and allocations.
- Number and types of financial documents reviewed (e.g., national budgets, health sector plans, donor reports).
- Identification and categorization of at least 90% of known immunization funding streams.
- A validated resource mapping matrix showing contributions by stakeholder and funding source.
- Number of internal and external funding sources identified and documented.
- Number of stakeholders consulted (e.g., government ministries, UN agencies, donors, NGOs).
- Proportion of financial contributions successfully verified with primary stakeholders (target: >80%).
- Finance model projecting costs and funding gaps to 2030 developed.
- Stakeholder validation of cost and gap analysis findings (e.g., workshop feedback score ≥80% satisfaction).
- Immunization investment plan finalized and endorsed by the MOH and key stakeholders.
- Inclusion of clear financing targets, timelines, and responsible entities in the investment plan.
- Number of recommendations from the resource mapping and cost analysis reflected in the plan.

11. FREQUENCY OF PERFORMANCE REVIEWS

The selected institution or contractor will be responsible for submitting progress reports and documentation in accordance with the agreed deliverables outlined in the work plan. In addition, regular coordination meetings will be held with UNICEF and the MOH, typically on a bi-monthly basis or when there is a need from both parties (UNICEF, MOH or the Contractor). UNICEF will provide continuous feedback to the consultants to ensure timely and quality delivery of outputs. Performance reviews will be conducted following the submission of each deliverable to assess progress, adherence to timelines, and alignment with project objectives. All reports and outputs must be submitted electronically in commonly used formats, including Microsoft Word, Excel, and relevant statistical software (e.g., STATA, SPSS, or R), as applicable.

12. Conditions:

The contractor shall work from their own office, using their own resources and materials for the execution of this assignment. The contractor's fee will therefore be inclusive of all office administrative costs. In conducting the assessment, the contractor will rely on its own equipment, scales, and devices, which must be standard, reliable, and accurate throughout the duration of the service. In case of travel, the following will apply:

- Local travel and airport transfers (where applicable) will be covered in accordance with UNICEF's rules and tariffs.
- Flight costs will be covered at economy class rate as per UNICEF policies.
- Any air tickets for travel will be authorized by and paid for by UNICEF directly and will be for the attendance of meetings and workshops.

All persons engaged under a UNICEF service contract, either directly through an individual contract, or indirectly through an institutional contract, shall be subject to the UN Supplier Code of Conduct: https://www.ungm.org/Public/CodeOfConduct
Documents should contain all the contents for review without additional links as per the TOR requirement and technical criteria for review.

13. CALL FOR PROPOSALS

(items to be included in proposal/response, such as workplan, timeline, methodology, samples, budget, etc.)
(Example)

A two-stage procedure shall be utilized in assessing the proposals, with assessment of the technical proposal being completed prior to any price proposal being compared. Applications shall therefore contain the following required documentation:

A. Technical proposal

Applicants shall prepare a proposal as an overall response to ToR ensuring that the purpose, objectives, and deliverables of the assignments are addressed. All proposals to include (but not limited to):

- A technical proposal that includes a brief cover letter and understanding of the assignment is required.
- Based on the proposed timetable laid down in the TOR, a proposal of the detailed methodology, tentative work plan and time schedule is required.
- Updated profiles/ CVs of the team members listing similar experiences/assignments and highlighting those focused-on adolescents/youth budgeting, youth engagement and participation.
- Quality assurance mechanism and risk mitigation measures put in place
- Example of similar projects done and at least two references from a previous vendor

A.B. Financial Offer

- A financial proposal with a breakdown of all costs that are to be charged to UNICEF and based on deliverables. This includes estimated number of working days, consultancy fees, all office administrative costs, international and local travel costs, as well as any additional requirements needed to complete project or that might have an impact on cost or delivery of products. Travel expenses should be based on the most direct route and economy fare. Quotations for business class fare will not be considered.

The Financial Proposal shall be submitted in a separate file, clearly named Financial Proposal. No financial information should be contained in the Technical Proposal.

C. Timetable (Schedule)

This section should include a proposed time/delivery schedule. An action plan specifying the timeframe with various milestones and activities should be included under this section.

In addition, the institution should consider the following in the submission:

A. Company profile (Company structure, team composition, organogram…etc)

B. A complete copy latest audited financial statements with comparative figures for the two most recent years; preferably signed by Company's accounting firm/certified external auditor.

The financial statements are to include, but not limited to, the following:

- The Balance Sheet (mandatory)
- The Income Statement/Profit and Loss Statement (mandatory)
- Statement of cash flows

C. Company registration

14. UNICEF RECOURSE IN CASE OF UNSATISFACTORY PERFORMANCE

UNICEF reserves the right to withhold payment on each individual and consolidated output until the consultant provide satisfactory quality output as reviewed by the project supervisor. In case of unsatisfactory performance, the payment will be withheld until quality deliverables are submitted.

15. REQUEST FOR PROPOSAL EVALUATION AND WEIGHTING CRITERIA

__70___% technical

__30___% financial

100% total

Submitted proposals will be assessed using Cumulative Analysis Method. All requests for proposals will be weighed according to the technical (70 points) and financial considerations (30 points). Financial proposals will be opened only for those applications that attained 70% or above on the technical part. Below are the criteria and points for technical and financial proposals.

A. Technical Proposal

1) Overall Response (10 points)

- General adherence to Terms of Reference and tender requirements (03)

- Elaborated and articulated understanding of scope, objectives and overall assignment requirements. (07 points)

2) Company and Key Personnel (30 points)

- team member(s) meet academic requirements (04 points)
- company meets minimum 8 -10 years of experience (03 points)
- company has previously conducted similar work (4 points)
- company is properly registered a/o has required certifications, memberships, etc. (02 points)
- Quality assurance mechanism and risk mitigation measures (05 points)

- Two Samples of previous relevant work undertaken successfully by the contractor. (03 points)
- Names and CVs of team members entailing their specific academic, professional backgrounds and roles in the assignment for UNICEF review and approval. The Contractor should make a commitment to this effect, in order to avoid possible changes in the team members' composition after the start of the assignment. (06 points)
- Management approach at the functional and the senior management levels. (03 points)

3) Proposed methodology and approach (30 points)

- deliverables are addressed as per TOR (25 points)
- proposed timelines are met (05 points)

Minimum technical score: 70% of 70 points = 49 points

B. Financial Offer

A separate Financial Offer detailing all activity expenses and logistics should be submitted under this section. The financial offer (this section) should be submitted on a separate page from the Technical Capability and Schedule information. Only those financial proposals will be opened which have been technically accepted according to the above criteria. The financial proposal will be weighted based on the clarity and appropriateness.

Total Financial (30 points)
The Contract shall be awarded to a bidder obtaining the highest combined technical and financial scores. Proposals not complying with the terms and conditions contained in this ToR, including the provision of all required information, may result in the Proposal being deemed non-responsive and therefore not considered further.

Enquiries:
Please direct any enquiries to the focal person indicated on the tender document.
Proposals with all supporting documents should be addressed to:
UNICEF Jordan Country office Bids
jordanbids@unicef.org