

REQUEST FOR PROPOSALS

Issue Date: 21 October 2011
Closing Date: 25 November 2011
Closing Time: 12:00 Noon, Geneva Time

Request for Proposals (RFP) No.: TGF-11-099 – Public Relations and Media Training services

Dear Sir/Madam:

The Global Fund to Fight AIDS, Tuberculosis and Malaria (the “Global Fund”), is seeking proposals from qualified suppliers to provide for Public Relations and Media Training Services, as fully described in Section A, Statement of Work, of this solicitation.

This RFP consists of this cover letter and the following attachments:

Section A: Statement of Work – Description of the Services required
Section B: Evaluation Criteria
Section C: Guidance for Suppliers
Attachment A: Past Performance Information
Attachment B: Cost Proposal Template

The **Global Fund Standard Terms and Conditions** form an integral part of this RFP and will be included in any contract resulting from this solicitation. Submitting a proposal in response to this RFP constitutes acceptance of these terms and conditions, found at this link on the Global Fund website: <http://www.theglobalfund.org/en/business/>

To be eligible as a supplier with the Global Fund, any organization or individual must comply with the **Policy on Ethics and Conflicts of Interest for Global Fund Institutions** and the **Supplier Code of Conduct**. Both are located on the Global Fund website at the following link: <http://www.theglobalfund.org/en/business/>

You are invited to submit a proposal based on the background, guidelines and instructions for submission in the following pages. Proposals must be received no later than 12 noon Geneva time on the closing date and must be submitted by E-mail to: solicitation@theglobalfund.org and Riana.Napitupulu@theglobalfund.org. Both the subject line of your email and the attached document must be labelled as follows:

“(organization name) – Proposals – for RFP–TGF-11-099 – Public Relations and Media Training Services”

Any questions and/or requests for clarifications in relation to the RFP must be submitted in writing by no later than **10 November 2011** via email to: Solicitation@theglobalfund.org and to the undersigned at Riana.Napitupulu@theglobalfund.org.

Sincerely,

Riana Napitupulu
Procurement Manager

SECTION A STATEMENT OF WORK

Public Relations and Media Training Services

I. BACKGROUND

The Global Fund to Fight AIDS, Tuberculosis and Malaria is a unique global public/private partnership dedicated to attracting and disbursing additional resources to prevent and treat HIV/AIDS, tuberculosis and malaria. This partnership between governments, civil society, the private sector and affected communities represents a new approach to international health financing. The Global Fund works in close collaboration with other bilateral and multilateral organizations to supplement existing efforts dealing with the three diseases.

Since its creation in 2002, The Global Fund has become the dominant financier of programs to fight AIDS, tuberculosis and malaria, with approved funding of US\$ 21.7 billion. To date, programs supported by The Global Fund have saved 6.5 million lives through providing AIDS treatment for 3 million people, anti-tuberculosis treatment for 7.7 million people and the distribution of 160 million insecticide-treated nets for the prevention of malaria.

The Global Fund is a non-profit foundation under Swiss law and its headquarters are based in Geneva, Switzerland. For further information about the organization and different contents, please consult the Global Fund's web site: www.theglobalfund.org.

The Global Fund maintains a three-year Replenishment Cycle, with the current cycle being 2011-2013. In 2012, a mid-term meeting for donors will be used to highlight the organization's continuing funding shortfall, and making a case for additional resources will be a central element of next year's communications activities. Similarly, 2013 will focus on highlighting the organization's funding needs for the upcoming replenishment period.

In addition, the Global Fund is currently formulating a comprehensive reform program in response to recent questions raised on weaknesses in its fiduciary control and oversight systems. This reform program will be rolled out in early 2012. It will be important to communicate how the organization is changing and how it is positioning itself to be a highly efficient channel of resources for the fight against the three diseases in a decade of austerity.

These major factors will need to be taken in to account in the development of a communications strategy for the organization over the next two years.

II. OBJECTIVE

The Contractor shall provide services in Public Relations and Crisis Communications and deliver consistent and high-quality strategic public relations services on issues of interest to the Global Fund in the areas of development finance, poverty reduction, global public health and the need to strengthen health systems. More specifically, the contractor shall provide services that address the ways in which these issues impact the organization's work in the fight against AIDS, tuberculosis and malaria.

III. SCOPE OF WORK

Public Relations and Crisis Communications

The Contractor shall, specifically provide the following services:

- 1) Senior high-level advice to senior executives on the strategic direction of communications at the Global Fund on a regular basis;
- 2) Additional capacity to Global Fund media outreach, in particular for special events and/or focused outreach (with a capacity to be on-site)
- 3) An annual analysis of media coverage of the Global Fund, and based on this analysis, strategic recommendations for communications direction for the following year;
- 4) Strategic advice for immediate additional capacity/resources as necessary for crisis prevention and management and reputational management. In addition, the provision of strategic advice on the management of the Transformation Process the Global Fund will go through in 2012.
- 5) Place selected stories with key media through a high-level network of media contacts (over and above the Global Fund's own ability to place stories with media).

Media Training Program

The Contractor shall provide a fully developed tailored media training program for the next 24/36 months including training sessions for new/existing Global Fund staff – both Managers and Senior Executives, as well as staff which engage with media in the field.

In particular, the 2012 media training/refreshers sessions should be envisaged in relation to particular milestones related to the mid-term replenishment process, for which successful message delivery and control will be of particular importance.

1. Senior Management – Leadership interview rehearsals

- *Objective:* Prepare core team of spokespeople for milestones in the mid-term replenishment process. Refresh message delivery and interview control techniques
- *Participants:* Key campaign spokespeople, one participant per session
- *Format:* half-day on-camera sessions. The training sessions could take the format of dry rehearsals in advance of concrete media opportunities, e.g. in critical donor countries.
- *Programme:* The sessions should entail various interview simulations based on individual scenarios relevant to Global Fund issues. The feedback provided by the trainer and journalist would provide opportunities to refresh key message control and delivery techniques.

Within 4 weeks of the training, feedback will be provided to each participant in the form of a call or a meeting to provide concrete 'action points'.

2. Unit Directors, Team leaders and other senior Global Fund staff

a) Individual training sessions for Unit Directors and Team leaders

- *Objective:* Share Global Fund corporate messages with seniors and train them in delivering them to media and other stakeholders
- *Participants:* Senior staff members who have not been trained yet

- *Format:* half-day on-camera sessions, one to two participants per session
- *Programme:*
 - How can Unit Directors and Team Leaders contribute to the success of the latest media campaign?
 - The Global Fund's media messages, and how to tailor them locally
 - What makes news and why?
 - Message Delivery
 - Interview control
 - A minimum of three interview simulations, followed by feedback from the trainer and journalist

b) Group training sessions for Grant Portfolio Managers

- *Objective:* Strengthen message delivery of Grant Portfolio Managers, not solely focusing on the media
- *Participants:* Grant Portfolio Managers focusing on geographies where positive media and stakeholder relations are key for continued success
- *Format:* One-day sessions for a maximum of 4 participants. Ideally participants would be grouped by regional responsibilities, common challenges faced or upcoming activities
- *Programme:*
 - How can Grant Portfolio Managers contribute to the success of the replenishment campaign?
 - The Global Fund's corporate messaging, and how to tailor it locally
 - Effectively bringing your messages across to local stakeholders (media and other)
 - Dos and don'ts of dealing with the media
 - Two to three simulations of stakeholder interaction, not necessarily always with the media, followed by feedback from the trainer(s)

Within 4 weeks of the training, feedback will be provided to each participant in the form of a call or a meeting to provide concrete 'action points'.

IV. DELIVERABLES

The Contractor shall deliver the following:

1. Regular conference calls to provide the Director of Communications and other Global Fund executives with strategic advice on issues of importance to the organization. These calls should be conducted at Partner/Senior Vice President level from the contractor's side.
2. On-site presence (as required) to enhance Global Fund media outreach capacity for special events
3. In Q4, an annual analysis of media coverage of the Global Fund that year (including traditional, on-line, social media) and written strategic recommendations for communications direction for the following year;
4. In Q4, a summary of placement of selected stories with key media through the year with proposals for additions to the existing high-level network of media contacts.
5. A minimum of four media training sessions for Managers or executives during the year.
6. A training plan for mid-level managers of the Global Fund for delivery 3 months after the contract award.

V. KEY PERSONNEL/POSITIONS

Key Personnel includes individuals who are employees or consultants of the Contractor and/or of its sub-contractors whose performance is considered essential to the effective performance of Services under this Contract. The names and positions of Key Personnel are specified in this Contract. The following are considered key positions:

1. Senior Counsellor at the Senior Vice President or Partner level
2. Project Manager
3. Media Trainer
4. Media Analyst

The Contractor must notify the Global Fund if it or its sub-contractor(s) intend to remove or replace any Key Personnel specified in the Contract and must provide the Global Fund with a resume of the proposed candidates who will replace any such individuals. Any replacement of Key Personnel shall be subject to the approval of the Global Fund.

VI. RELATIONSHIP & RESPONSIBILITIES

The provider will work under the direction of the Global Fund, Director of Communications or his designee.

VII. PERFORMANCE OF PERIOD

The overall period of performance will cover the period from 1 January 2012 to 31 December 2014 with an option of renewal for one more year, subject to successful performance.

SECTION B: EVALUATION CRITERIA

A Global Fund evaluation panel will assess the extent to which proposals submitted in response to this RFP meet the evaluation criteria below.

The evaluations are divided into technical and cost factors. These factors will be evaluated relative to each other as described herein.

In assessing each proposal, the Global Fund will allocate greater importance to technical factors than to cost factors. This will be reflected in the weighting that the Global Fund will employ in assigning a total score to each proposal. While the technical score will be significantly more important, cost will be a factor in the evaluation.

The score assigned to each proposal will be of guidance in determining which proposal would provide the greatest value to the Global Fund. However, the Global Fund reserves the right not to employ raw scores in determining best value where it considers, in its sole discretion, that this would not be appropriate.

The proposals will be evaluated based on the following Evaluation Criteria:

A. Technical Evaluation Criteria

1. Technical Approach and Methodology:

Proposals will be assessed on the extent to which the proposed approach and methodology are solid, feasible, implementable and effective.

2. Technical Expertise

- **Understanding of the Requirements (Scope of Work) Reference):** Proposals will be assessed on the extent to which the proposal demonstrates a clear understanding of the nature of the work being undertaken and the environment in which the work must be performed.
- Understanding of the Global Fund, its mission, mandate and business model;

Responsiveness to the Scope of Work: Proposals will be assessed on the extent to which the proposal is responsive to and meets the criteria detailed in the scope of work.

- #### 3. Expertise and Qualifications of proposed personnel:
- Proposals will be assessed on the extent to which the Supplier is demonstrated to have sufficient personnel with the necessary education, training, technical knowledge and experience for their assigned functions.

Required and Desired Qualifications

Offeror shall appoint a strategic advisor at the senior vice president or partner level who shall serve as the primary point of contact on this particular contract. As a minimum, the strategic advisor should have the following experience and qualifications:

- At least 20 years of experience in communications, including experience at a senior level in a corporate communications context.
- Broad knowledge of key issues and trends in international development and public affairs, with some experience working in developing countries.
- Ability to think strategically and to write clear, thoroughly researched and executable crisis communications strategies.
- Ability to synthesize complex information and develop clear “media-ready” messages.
- Ability to interact and work closely with client and the media.
- Excellent oral and written communications skills and presentation skills.

- Strong project management skills.
- Ability to manage multiple projects under tight deadlines.
- Passion for executing deliverables and programs that are of the highest quality possible, fully support the strategic direction of the Global Fund and are in line with or exceed the Global Fund's expectations.

Other key personnel should include:

- a media trainer with 10-15 years of experience preparing executives for interviews with high-profile print, television, radio and internet-based media.
- a media analyst with at least eight years of experience in assessing and evaluating trends in media coverage.

Language Competency:

All key personnel must have excellent oral and written **English** skills. For the strategic advisor fluency in French and another major European language is desirable.

4. Experience/Capability and Past Performance

Ability to demonstrate successfully performed similar work for international organizations.

- Experience and abilities of the proposed candidate based on his or her resume;
- Proven track record in managing crisis communication for major clients. Please provide two or more case stories of previous work with clients in major crisis situations; and
- Your agency's Crisis Communications reputation. Please provide the contact details of at least two references and any other third-party assessment/ descriptions of your agency's track record.

Total

100 Points

B. Cost Evaluation Criteria

The Cost proposal will be evaluated in terms of best value to the Global Fund, price and other factors considered.

C. Evaluation Process

A two stage procedure will be utilized in evaluating the proposals, with evaluation of the technical proposal being completed prior to any price proposal being considered. A cost evaluation is only undertaken for technical submissions that score above the minimum.

Each technical proposal will be evaluated in accordance with the technical evaluation criteria above. Full and impartial consideration will be given to all offers received pursuant to this solicitation, and the evaluation will be conducted in the same manner.

A minimum technical score is required to pass the technical evaluation. A Technical proposal which fails to achieve the minimum technical threshold will not be considered further. Selection of the successful will be based on the best value offered.

SECTION C: GUIDANCE FOR SUPPLIERS

GENERAL INSTRUCTIONS

The Global Fund may, at its discretion, change the closing date, cancel the RFP, or revise the terms of reference, by issuing an amendment to this solicitation.

Proposals which are submitted late or are incomplete may not be considered in the review process.

All proposals must be submitted in English. The RFP number and your company name must be clearly indicated in the subject line of your e-mail and in the document name as described in the cover letter for this solicitation.

The Global Fund may (a) reject any or all proposals, (b) accept for award a proposal other than the lowest cost proposal, (c) accept more than one proposal, (d) accept alternate proposals, (e) accept part of a proposal, (f) waive informalities and minor irregularities in proposals received, and (g) cancel this RFP.

The Global Fund may award one or more contracts on the basis of initial proposals received, without discussions or negotiations. Therefore, each initial proposal should contain the Supplier's best terms from a cost and technical standpoint. The Global Fund reserves the right (but is not under obligation to do so) to enter into discussions with one or more Suppliers in order to obtain clarifications or additional detail, to suggest refinements in the technical proposal or other aspects of the proposal, or negotiate the cost proposal.

In addition to the written proposal, the Global Fund may request suppliers to make oral presentations in English or to participate in a pre-proposal conference. The date, time, and place for such (if any) will be communicated to all eligible suppliers. Information obtained through oral presentations will be considered in the overall evaluation process.

The Global Fund will be under no obligation to reveal, or discuss with any Suppliers, how a proposal was assessed, or to provide any other information relative to the selection process. Suppliers whose proposals are not selected will be notified in writing of this fact, and shall have no claim whatsoever for any kind of compensation.

This RFP shall not be construed as a contract or a commitment of any kind. This request for proposals in no way obligates the Global Fund to award a contract, nor does it commit the Global Fund to pay any cost incurred in the preparation of the proposal.

Suppliers are solely responsible for their own expenses, if any, in preparing and submitting an offer to this Request for Proposal. This would include any costs incurred during functional demonstrations, oral presentations and subsequent meetings and negotiations.

The Suppliers are requested to indicate the earliest start date and to hold the cost proposal and the team structure for 90 days from the deadline for submission. The Global Fund will make its best effort to finalize selection within this period. Any changes to the proposed personnel in advance of this should be notified in writing.

All questions and related responses (without identifying the source of inquiry), as well as any amendments to this RFP, may be posted on the Global Fund website: http://www.theglobalfund.org/en/business_opportunities/. Offerors are encouraged to check this website on a regular basis

HOW TO BEST DEVELOP YOUR PROPOSAL

1. TECHNICAL PROPOSAL

The technical component of your proposal should be concisely presented and structured, and should explain in detail your ability, capacity and resources to provide the requested services. **Short introduction and areas of specialty/expertise.**

When assessing your proposal, we will look for work experience and qualifications which correspond directly to the requirements set out in the scope of work. Although not an exhaustive list, specifics regarding, information on the company, years of experience with respect to the company/organization and its personnel, CVs and licensing or educational qualifications, geographical and field experience, Information Technology capabilities and software expertise, information regarding your availability - are some exemplar areas which should be clearly highlighted in your proposal, where appropriate. (See section B: Evaluation Criteria)

Please provide a one (1) page general response detailing the location of your headquarters and the locations of satellite offices that you have around the world and a one (1) page general response detailing the technology and tools you would use for media outreach, media intelligence, and coverage in markets where you do not have a physical presence and for which the offeror is bidding.

In addition, please provide a two (2) page general response describing your capacity to act on a stand-by basis 24/7 with advice and services and provide a description of any experience in which you have planned and executed a news conference or other public relations event on short notice and with limited time.

It is also important to provide the requisite past performance information as described below.

Past Performance Information

As part of the Technical Proposal, suppliers are required to provide information regarding prior work experience. Please use Attachment A, Supplier's Profile and Past Performance Information form. In preparing your past performance document, you must ensure it contains the following:

- Three (3) recent contracts executed within the last five years which are similar in nature to the technical requirements of this solicitation.
- Place and period of performance
- Information regarding the client and contact details
- description of the work

The Global Fund reserves the right to contact any persons listed in your past performance document in order to gain a better understanding of the supplier's past performance in delivering similar services to former clients.

2. COST PROPOSAL

Cost proposals shall be submitted in US Dollars. Special U.N. or other discounted rates (if any). All proposed price shall be inclusive of all direct and indirect costs as well as profit or fees and shall be fixed for the period of the contract.

Cost proposals must be submitted in a uniform format **using Attachment B** included in this solicitation.

1. Proposed schedule of Daily Rates

Please submit a schedule of Daily Rates for all personnel necessary to carry-out the work specified in the Statement of Work.

The proposed daily rate shall:

- a) include salary and associated costs (i.e any necessary insurance fringe benefits, overhead, operating costs management fees and profits and any subcontracting fee);
- b) not include the cost of travel, accommodation and other per diem costs or communication.

The Schedule of Daily Rates should be in the following format provided below and included in **Attachment B**:

<u>Position/Title</u>	<u>Area of Expertise</u>	<u>Daily Fee Rate</u>
Senior Counsellor at Senior Vice President / Partner level	<i>Strategic advisor..etc..</i>	<i>USD</i>
Project Manager		<i>USD</i>
Media Trainer		
Media Analyst		

2. Media Training for the Grant Portfolio Managers

Using **Attachment B**, construct a Cost Proposal to carry out a Media Training for the Grant Portfolio Managers to be held in Geneva. Offeror shall provide a full breakdown of costs, stating all conditions. The cost component must cover all the services requested in the scope of work. The cost tables and accompanying notes must show the composition of all cost elements, including hidden fees and profits.

a. Labor Cost

Offerors should provide a separate line item for each proposed individual and specify the name, position, number of workdays and daily rate for each individual either under prime or sub-contractors.

b. Other Direct (Reimbursable) Cost

Offerors should propose a detailed estimate of other direct costs which are considered necessary for completion of the work. Each line item of other direct costs shall be separately identified, and shall include a narrative and numerical basis for the cost estimate.

All reimbursable costs and per diems (if any) are determined by the Global Fund Travel & Expense Policy.

ATTACHMENT A

SUPPLIER'S PROFILE AND PAST PERFORMANCE INFORMATION

Please fill out the form below to provide your company's profile and Past Performance Information.

1. Company's name:	
2. Address: (Include Phone, Fax numbers and Email address as well as website address, if any).	
3. Year of establishment:	
4. Core or Line of business:	
5. Number Of employees:	
6. Type of Organization The Supplier, by checking the applicable box, represents that it operates as:	<input type="checkbox"/> a corporation organized under the laws of _____ (country), <input type="checkbox"/> an individual, <input type="checkbox"/> a partnership, <input type="checkbox"/> a nongovernmental non-profit organization, <input type="checkbox"/> a nongovernmental educational institution, <input type="checkbox"/> a governmental organization, <input type="checkbox"/> a private college or university, <input type="checkbox"/> a public college or university, <input type="checkbox"/> an international organization, <input type="checkbox"/> a joint venture, or <input type="checkbox"/> a consortium.
7. Other office locations (if any) and how many:	
8. Past Performance References. Please provide the list of the <u>five most recent contracts</u> awarded to your company. Specify the name, position, phone number, email address) and relationship to the Services. The Global Fund reserves the right to contact any persons listed here in order to gain a better understanding of the Supplier's past performance in delivering similar services to former clients.	<ul style="list-style-type: none"> • _____

Financial Resources Information

Suppliers whose proposals are considered within the competitive range may be requested to provide information which demonstrates that the Company has sufficient financial resources, or ability to obtain them in providing the Services in a timely and effective manner:

- i. A copy of the three latest audited financial statements or the most recent interim financial statement or management account of the entity.
- ii. A statement of the financial capability, working capital and other financial resources available to perform the contract.

AUTHORIZED INDIVIDUALS

The Supplier represents that the following person(s) are authorized to negotiate on its behalf with the Global Fund and to bind the Supplier in connection with this proposal.

Name:

Title: |

CERTIFICATION

I certify that the above information is true and correct.

Date: _____

Name: _____

Title: _____