

REQUEST FOR QUOTATIONS (RFQ)

RFQ Information Table	
Issue Date:	28/03/2024
RFQ Closing Date:	15/04/2024
Quotation Submission Address:	By E-mail to Kamilla.nurbaeva@theglobalfund.org
Global Fund Contact and Contact Information:	By E-mail to Kamilla Nurbaeva: Kamilla.nurbaeva@theglobalfund.org

Subject: Request for Quotations - Communication Agency to support the implementation of the Global Fund's Philanthropy Engagement Strategy

1. The Global Fund to Fight AIDS, Tuberculosis and Malaria (the "Global Fund"), invites quotations for service to help build and execute a communications strategy to support the organization's Philanthropy Engagement Strategy which aims to engage individual business and philanthropy leaders, high-net-worth individuals, foundations and high-profile partners in supporting the Global Fund's mission, and building a strong foundation in the runup to the major 8th Replenishment Conference of the Global Fundas fully described in Attachment A (Terms of Reference) of this RFQ.
2. This RFQ consists of the following sections:
 - a. Attachment A: Terms of Reference;
 - b. Attachment B: Quotation Requirements; Terms & Conditions

ATTACHMENT A: Terms of Reference

- Title** **Communication Agency to support the implementation of the Global Fund’s Philanthropy Engagement Strategy**
- Introduction** The Global Fund is seeking a communications agency to help build and execute a communications strategy to support the organization’s Philanthropy Engagement Strategy which aims to engage individual business and philanthropy leaders, high-net-worth individuals, foundations, and high-profile partners in supporting the Global Fund’s mission, and building a strong foundation in the runup to the Eight⁸th Replenishment Conference of the Global Fund.
- Background** I. About the Global Fund
- The Global Fund is a partnership designed to accelerate the end of AIDS, tuberculosis and malaria as epidemics. As the largest multilateral grant funding mechanism in global health, the Global Fund mobilizes and invests more than US\$4 billion a year to support programs run by local experts in more than 100 countries.
- As a partnership between governments, civil society, technical agencies, the private sector and people affected by the diseases, the Global Fund challenges barriers and embraces innovation to effectively fight against infectious diseases.
- Since its inception in 2002, 59 million lives have been saved through programs supported by the Global Fund.
- The impact achieved by the Global Fund partnership is proof that when the world unites around a common goal, we can achieve remarkable progress against infectious diseases. Since the Global Fund was founded, the number of people dying from HIV, TB and malaria has been slashed by one-third.
- However, these three diseases still kill 2.7 million people a year, and the COVID-19 pandemic threatens to devastate vulnerable health systems – with catastrophic consequences on the fight against HIV, TB and malaria. New challenges are further fueled by rising complacency and increasing fatigue around overseas development aid in certain key markets.
- Strengthening global security and protecting hard-won gains in the fight against AIDS, TB and malaria is vital. To do this, we must ensure low-middle income countries can effectively respond to new and emerging health threats. This is only achievable if the fight against the three diseases and strengthening weaker health systems, remains high on the global agenda.
- Diseases know no borders, and the COVID-19 pandemic shines a harsh spotlight on the fact that our global health security is only as strong as the world’s weakest health system. Investments in global health are critical to keep people safe from existing and emerging health threats. As the largest multilateral funder

of health systems worldwide, the Global Fund invests US\$1 billion a year to improve systems for health – strengthening and building diagnostic tools and laboratory facilities; data and surveillance systems; procurement and supply chains; community systems; and training of health workers.

Investing in global health is one of the best investments the world can make. Global Fund investments stimulate economic growth and help make countries more stable and more prosperous.

The Global Fund Strategy for 2023-2028: Fighting Pandemics and Building a Healthier and More Equitable World recognizes the critical contribution the Global Fund makes to pandemic preparedness. As noted by the Lancet, over one-third of the Global Fund's work supports health security, and the new strategy builds on this.

A powerful sense of global solidarity inspired the creation of the Global Fund, and that solidarity still has the power to end these epidemics today. In 2015, the organization joined the endorsement by world leaders of the 2030 Agenda for Sustainable Development as a landmark opportunity to improve billions of lives worldwide and promote opportunity and social justice. The agenda is based around 17 Sustainable Development Goals (SDGs), which comprise an urgent call for action by all countries – developed and developing – in a global partnership.

The core mission of the Global Fund to defeat HIV, TB and malaria as epidemics is directly linked to health SDG3: 'Ensure healthy lives and promote well-being' and is one of the most crucial building blocks for successful growth and development. The Global Fund's mission intersects with multiple SDGs. From ending poverty (SDG1) and hunger (SDG2), to ensuring quality education (SDG4) and ending gender discrimination which fuels diseases, especially HIV (SDG5). Progress in each of these goals accelerates impact among all the others. While the Global Fund partnership continues to have a huge impact, the world is not on track to meet the SDG3 target of ending HIV, TB and malaria as epidemics by 2030.

II. Replenishment Cycles

To support the Global Fund's mission to end the world's three deadliest infectious diseases, the organization receives voluntary funding in three-year cycles – 93% comes from the public sector with the remaining 7% coming from the private sector, private foundations and innovative financing initiatives. To date, seven Replenishment cycles have been completed. In late 2022, the 7th Replenishment Conference was hosted by President Joe Biden in New York. In an unprecedented show of global solidarity, donors pledged over US\$15 billion for the next three years – the largest amount ever raised for a multilateral health organization.

The eighth Replenishment Conference, as the world's largest resource mobilization event for global health and pandemic preparedness and response will take place in the fall of 2025.

III. Philanthropy Engagement Strategy

Targeted communications support with a focus in the US builds on the ongoing implementation of the Philanthropy Engagement Strategy for the Global Fund, agreed by the Private Sector Engagement Division (PSED) and Global Fund leadership, based on consultations with partners, leading philanthropists and advisors.

This consultancy will play a key role to mobilize the philanthropy sector's engagement in the Global Fund's 8th Replenishment building on the Global Fund Strategy 2023-2028.

To set the foundation for a strong 8th Replenishment, the Global Fund's goals for working with the private sector in 2024 include:

1. increase revenue ahead and in preparation for 8th Replenishment, building on the historic 7R raise;
2. diversify global funding streams to meet increased need /donor demand and mitigate risk; and
3. accelerate ambitious thought leadership by providing both a voice and platform to amplify the investment case and the need for increased commitments.

Objectives

Philanthropy Engagement Strategy Objectives:

- **Build and grow** our existing philanthropy partnerships and attract new supporters.
- **Encourage greater leadership** from Philanthropists and Private Sector leaders on global health issues, including climate and health, health strengthening systems and pandemic preparedness.
- **Develop collective philanthropy partnerships**, by engaging a group of individual leaders in global health issues based on shared agendas, commitments, and values.

Communications Objectives (focus on the U.S.):

- **Coordinate and Collaborate with the Global Fund's communications department and their replenishment strategy to strengthen** the Global Fund's brand positioning and visibility among a Philanthropy-specific audience, in particular in the U.S region, as well as Europe ;
- **Maximize** the Global Fund's Philanthropy Engagement efforts through strategic communications, high-level counsel and by surfacing and confirming new-to-the Global Fund press, thought leadership and visibility opportunities;
- **Develop** and expand on powerful narratives and new communications tools that resonate within culture and drive increased engagement with a philanthropic audience to maximize exposure, strengthen existing relationships and attract a wider support base;

- **Motivate**, inspire and increase engagement among the target audience in the mission and activities of the Global Fund, and in pandemic preparedness and response.

Scope

The appointed agency will update and execute a compelling communications and media strategy that supports the Global Fund’s Philanthropy Engagement in the focus regions, while being closely aligned to and in regular communication with the Global Fund’s broader replenishment communications strategy, brand identity, and Replenishment campaign and investment case.

The agency will provide consultancy on effective strategic communications and engagement opportunities to reach and position the Global Fund among our target audience of philanthropists, high-net-worth individuals and foundations. Ideally, the successful agency will have experience in developing partnerships and bespoke communications for and with philanthropy, business, and non-profit leaders in the United States, and other regions with the ability to reach international outlets with ease. Guided by the strategy and on a case-by-case basis, the agency will support individual proposals, communications tools and materials.

The key objective will be to support the communications departments’ replenishment strategy to create the “surround sound” of the Global Fund’s brand and engagement efforts in the U.S. and globally, and to amplify the outreach to and negotiations with prospective philanthropy partners such as business leaders, high- net-worth individuals, and other partner networks.

The agency will work in close collaboration with the Private Sector Engagement Department, the Global Fund’s Communications Department, external network generators and agencies, current private sector and civil society partners, and other Global Fund stakeholders.

Target Audience

Philanthropists, ultra-high-net-worth individuals (UHNWIs), high-net-worth individual (HNWIs), business and non-profit foundation leaders.

Key Deliverables

Specific deliverables will be further refined in partnership with the selected agency, building on the following:

- Develop the 2024 private sector and philanthropic engagement communications strategy in collaboration with the broader Global Fund replenishment communications and media team, specifically targeting philanthropy-specific audiences, building on the existing Global Fund’s global communications strategy, brand identity, and the 8th Replenishment campaign and investment case.
- In coordination with the Global Fund media team, the agency will act as the key private sector media contact and liaison and coordinate media activities tailored to the target audience in the U.S. and globally, such as the drafting and placement of Op-eds, blogs, articles, podcasts, interviews, event speaking roles and other (co-) authored communications pieces and media moments in target publications.
- In coordination with the Global Fund Communications team, support the

messaging development around specific investment cases for strategic priority areas for the Global Fund, in line with the Philanthropy Engagement Strategy.

- Develop and deliver audience-specific communications tools and materials, including (but not limited to) executive briefings, key messages and talking points, and keep these updated as needed.
- Provide inputs on the Global Fund’s broader investment cases, communications and brand strategies, and their adaptations to philanthropy-specific audiences.

Experience Skills

- Proven networks and relationships with the relevant audience, markets, sectors, and media in the United States.
- Solid track record in media relations, branding, and strategic communications.
- Significant experience in working with the philanthropy, non-profit and/or development sectors, such as individuals, foundations, family offices, NGOs, international organizations.
- Strong writing skills with experience in global health and development, tech and innovation, and philanthropic impact.
- Design and production of communications materials.
- Understanding of global health and development issues and the three diseases.

Place of United States of America with a global focus

Performance

Period of Start date: 1 May 2024

Performance End date: 31 January 2025

Attachments <https://www.theglobalfund.org/en/>
<https://www.theglobalfund.org/en/private-ngo-partners/>
<https://www.theglobalfund.org/en/strategy-development/>

Contracting Party The Global Fund to Fight AIDS, Tuberculosis and Malaria

Evaluation

Criteria (for RFQ)

EVALUATION CRITERIA	WEIGHTAGE (Total = 100)
Skills/Competencies (including proven networks in relevant sectors)	40%

Qualifications	20%
Experience	20%

ATTACHMENT B:
Quotation Requirements | Terms & Conditions

A. Submission

1. The quotation must be submitted no later than the Closing Date, and by email to the Quotation Submission Address, indicated in the RFQ information table. Quotations which are submitted late or are incomplete may not be considered in the selection process. Any question should be sent to the Global Fund Contact as indicated in the RFQ information table.
2. The quotation must be denominated in US\$ exclusive of tax and submitted in English, in its original version in Portable Document Format (PDF). The quotation must include the following: pricing and concept statement.
3. The Global Fund may award one or more contract(s) on the basis of the quotations received, without discussions or negotiations. Therefore, each quotation should contain the bidder's best terms from a technical and cost standpoint. The Global Fund reserves the right (but is not under obligation to do so) to enter into discussions with one or more bidders in order to obtain clarifications or additional detail or negotiate the cost quotation.
4. The bidders are requested to indicate the earliest start date and to hold the price quotation for 90 days from the RFQ Closing Date. The Global Fund will make its best effort to finalize selection within this period.

B. Evaluation Criteria

Supplier selection will be based on the methodology and following criteria:

Please list each selection criteria and its corresponding weight in the table below. These will be evaluated by an evaluation panel by awarding points against each selection criterion.

For criteria 1 – Skills/Competencies:

- Proven networks and relationships with the relevant audience, markets, sectors and media in the United States
- Significant track record in media relations, branding and strategic communications and campaigns
- Strong writing skills with experience in global health and development, tech and innovation, and philanthropic impact.

For criteria 2 – Qualifications:

- Design and production of communications materials.
- Understanding of global health issues and the three diseases.

For criteria 3 – Experience:

- Significant experience in working with the philanthropy, non-profit and/or development sectors, such as individuals, foundations, family offices, NGOs, international organizations.

SELECTION CRITERION	WEIGHTAGE (Total = 100)
1) Skills/Competencies	40
2) Qualifications:	20
3) Experience:	20
Cost must be factor	20

} Maximum technical points

“A quotation may be considered within the competitive range if it receives at least (*insert #60*) out of (*#80*) maximum technical points available.” Therefore, if a quotation received (*insert #60*) or above, it is deemed *Technically Acceptable* otherwise *Technically Not Acceptable*. *Technically Not Acceptable* quotations are eliminated and only those that that are *Technical Acceptable* will undergo cost evaluation. Contract is typically awarded to the supplier that obtains the highest combined technical and cost score.

C. Legal Matters

1. This RFQ is in line with and subject to the following documents:
 - a) The Global Fund’s **Procurement Policy** (2008, as amended from time to time) and the **Procurement Regulations** (2020, as amended from time to time), which may be found at <https://www.theglobalfund.org/en/business-opportunities/>.
 - b) The **Code of Conduct for Suppliers (2021, as amended from time to time)**, which may be found at: https://www.theglobalfund.org/media/3275/corporate_codeofconductforsuppliers_policy_en.pdf;
 - c) The **Sanctions Panel Procedures Relating to the Code of Conduct for Suppliers (2020, as amended from time to time)**, which may be found at https://www.theglobalfund.org/media/6015/corporate_sanctionsprocedures_policy_en.pdf;
 - d) The **Global Policy on Conflict of Interest** (2020, as amended from time to time), which may be found at https://www.theglobalfund.org/media/6016/core_ethicsandconflictofinterest_policy_en.pdf?u=637319004468800000; and
 - e) The **Global Fund Terms and Conditions for the Purchase of Goods and Services, (May 01, 2023, as amended from time to time)**, as applicable, which will also be an integral part of any contract resulting from this RFQ, and which may be found at https://www.theglobalfund.org/media/3269/corporate_globalfundservices_termsconditions_en.pdf.
2. Submitting a quotation in response to this RFQ constitutes an acceptance of the terms indicated herein and of the terms of each of the above documents. If a bidder has any reservation with regard to the documents mentioned in Section C.1, including to the Global Fund Terms and Conditions of Purchase of Services or the Global Fund

Terms and Conditions of Purchase of Goods, as applicable, the bidder must raise such reservations during the RFQ process. The Global Fund reserves the right to reject the quotation of any entity or individual that fails or refuses to comply with, or accept, such terms.

3. The Global Fund makes no offer of a contract by posting this RFQ or evaluating any quotations submitted in response to it, and there is no legal agreement or relationship, whether in contract (express, implied or collateral) or tort, created by this RFQ process between the Global Fund and any bidder, with the sole exception of the provisions of this Section C. This RFQ in no way obligates the Global Fund to award a contract.
4. The bidder shall bear all costs associated with the preparation and submission of its quotation, and the Global Fund shall not be responsible or liable for those costs, whether direct or indirect, regardless of the conduct or outcome of the RFQ, nor if the RFQ is cancelled, altered or postponed for any reason. This includes, but is not limited to, any and all costs incurred for the oral presentations, site visits, visits to the Global Fund, functional demonstrations, and subsequent meetings and negotiations.
5. The Global Fund may, at its discretion, amend the RFQ, change the Closing Date for the submission of quotations or revise the Terms of Reference, by issuing an amendment to this RFQ.
6. The Global Fund may invite bidders to make oral presentations in English or to participate in a pre-proposal conference. The date, time and place of such presentation or pre-proposal conference will be formally communicated by the Global Fund to all bidders or pre-qualified bidders, as relevant. Any statement made during these meetings shall not in any way amend or modify the RFQ, unless it is issued as an amendment to the RFQ.
7. Contract award will be on the basis of obtaining best value for money whilst ensuring the requirements of the Global Fund are effectively met. At any time prior to contracting the Global Fund may (a) reject any or all quotations, (b) accept other than the lowest priced quotations, (c) accept more than one quotation, (d) accept alternate quotations, (e) accept parts of a quotation (f) waive informalities and minor irregularities in quotations received, and (g) withdraw an award in case of changed circumstances.
8. The Global Fund will not reveal or discuss with any bidder, how a quotation was assessed, or to provide any other information relative to the selection process. Bidders whose quotations are not selected may be notified in writing of this fact and shall have no claim whatsoever for any kind of compensation.
9. The bidder acknowledges and agrees that pursuant to the Global Fund policies and procurement procedures, the Global Fund may publish certain information consistent with its public status and commitment to transparency. As such, should the bidder be awarded a contract, the bidder acknowledges and agrees that the Global Fund may publish certain information relating to procurement contract awards, including without limitation the service provider's name, as disclosed on its website.
10. The Global Fund conducts integrity due diligence on its suppliers as a matter of course, including screening against international watchlists and adverse media databases. By responding to this RFQ, the bidder acknowledges that risk-based due

diligence measures, including personal data processing, where relevant, form a part of the Global Fund supplier selection and management. Integrity issues identified through due diligence may be raised during selection or subsequently and will normally be managed by requesting departments with support of Ethics Office, e.g. through mitigation measures. Global Fund may not retain suppliers that have been sanctioned by the UN, international financial institutions and major donors.

11. Personal data (i.e. any information relating to an identified or identifiable natural person) will be treated in compliance with Global Fund's policies, the Terms and Conditions of Purchase of Services or Terms and Conditions of Purchase of Goods, as applicable, and the Privacy Statement for the Global Fund Procurement Process (as amended from time to time) <https://www.theglobalfund.org/en/business-opportunities/>.
12. Through its participation to the RFQ process, the bidder acknowledges and warrants that it complies with internationally recognized standards for human rights, labor, the environment, anti-money laundering and anti-corruption. The bidder also acknowledges and warrants that they will neither use or engage in, nor allow their employees or other persons engaged by them to use or engage in sexual exploitation and abuse, and sexual harassment.
13. The investigative, decision-making, and sanctions policies and processes of the Global Fund, including the activities of its Inspector General, the Global Fund's Code of Conduct for Suppliers, and consideration of any findings of fraud or abuse by the Global Fund Sanctions Panel, should the Global Fund in its sole discretion choose to refer the matter to the Sanctions Panel, shall apply to this RFQ and any resulting contract, and these processes may include, without limitation, public disclosure at the Global Fund's full discretion of any findings and/or decisions.
14. Any dispute, controversy, claim, or issue arising out of this RFQ or surrounding this process, shall be finally settled by arbitration conducted in accordance with the United Nations Commission on International Trade Law (UNCITRAL) Arbitration Rules in force at the time of the commencement of the arbitration. The appointing authority shall be the Secretary-General of the Permanent Court of Arbitration. The case shall be administered by the International Bureau of the Permanent Court of Arbitration. There shall be one arbitrator. The place of arbitration shall be Geneva, Switzerland. The language to be used in the arbitral proceedings shall be English. All awards of the arbitral tribunal shall be final and binding upon the Parties.
15. The bidder acknowledges that, by virtue of its status as an international organization, the Global Fund benefits from privileges and immunities provided under international and national laws. Nothing contained in this RFQ may be construed as a waiver, express or implied, of the privileges and immunities accorded to the Global Fund, whether as of the date of this RFQ or thereafter.