

**REQUEST FOR QUOTATIONS (RFQ)
INVITATION NOTICE**

RFQ Information Table	
Issue Date:	11/08/2020
RFQ Closing Date:	25/09/2020
Quotation Submission Address:	By E-mail to Eva Trujillo Herrera: governance@theglobalfund.org
Global Fund Contact and Contact Information:	By E-mail to Eva Trujillo Herrera: governance@theglobalfund.org

Subject: Request for Quotations – Lead Facilitators and Facilitators for The Global Fund’s 6th Partnership Forum

1. The Global Fund to Fight AIDS, Tuberculosis and Malaria (the “Global Fund”) now invites quotations for its 6th Partnership Forum for the purpose of Lead Facilitators and Facilitators, as fully described in Attachments A and B (Statements of Work) of this solicitation.

Background

The Global Fund is a partnership designed to accelerate the end of AIDS, tuberculosis and malaria as epidemics. As an international organization, 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.

Find out more at: <https://www.theglobalfund.org/en/overview/>.

The Global Fund is seeking highly qualified and experienced Lead Facilitators to support the upcoming 6th Partnership Forum consultations. Given the uncertain evolution of the COVID-19 pandemic, these consultations may take place in a virtual setting.

The Partnership Forum is an integral component of the governance structure of the Global Fund. It is a coordination mechanism convened on behalf of the Board to provide input into the development and implementation of the next Global Fund’s Strategy. To this end, participants at the upcoming 6th Partnership Forum consultation will review input received to date on strategy development from across the Global Fund’s broad partnership and discuss potential areas of focus for its next Strategy.

The 6th Partnership Forum consultations will be split across 4 in person or virtual meetings scheduled between end of January and April 2021.

Approximately 350 participants in total (80% coming from the Global South), spread across 4 meetings, will take part of the Partnership Forum consultations representing the broad stakeholder partnership of the Global Fund, including representatives of key partners, public and private sector, civil society, communities affected by the three diseases, Global Fund governance officials, program implementers, donors and health expert providers, among others. Participants are expected to bring a diverse background with differing levels of engagement and understanding of the Global Fund. Participation at the 6th Partnership Forum is by invitation only.

During the Partnership Forum consultations interactive group discussions among participants will be focused around key strategic themes identified as critical to develop the next Global Fund strategy. **Please refer to the Strategy development [web page](#) for information on the ongoing open consultation on the development of the Global Fund’s post-2022 strategy.**

Experienced facilitators will support the convening of the 6th Partnership Forum consultations to enable discussions among diverse participants, and to ensure robust and relevant proposals are provided to the Board for consideration to develop the next Global Fund’s Strategy.

This consultancy is open to individual facilitators who meet the competencies for this role and to organizations that are able to propose a team of facilitators.

This scope of work describes the activities, timelines and deliverables expected of the individual facilitators.

2. This RFQ consists of the following sections:
 - a. Attachment A: Statement of Work for Lead Facilitators;
 - b. Attachment B: Statement of Work for Facilitators;
 - c. Attachment C: Requirements and evaluation criteria;
3. This RFQ is in line with, and subject to, the following documents:

The Global Fund’s Procurement Regulations (2017, as amended from time to time)	
The Global Fund’s Request for Proposals Solicitation Rules (2015, as amended from time to time)	https://www.theglobalfund.org/en/business-opportunities/
The Global Fund Terms and Conditions of Purchase of Services (2018, as amended from time to time) which will also be an integral part of any contract resulting from this solicitation	
The Policy on Ethics and Conflict of Interest for Global Fund Institutions (2002, as amended from time to time)	https://www.theglobalfund.org/en/policies-guidelines-templates/governance-policies/
The Code of Conduct for Suppliers (2009, as amended from time to time)	
The Sanctions Panel Procedures Relating to the Code of Conduct for Suppliers (2014, as amended from time to time)	

Submitting an quotation in response to this RFQ constitutes an acceptance of the terms indicated herein and of the terms of each of these documents, including the Global Fund Terms and Conditions of Purchase of Goods and Services, and the Global Fund reserves the right to reject the quotation of any entity or individual, as the case may be, that fails or refuses to comply with, or accept, such terms.

4. This RFQ shall not be construed as a contract or a commitment of any kind. This RFQ in no way obligates the Global Fund to award a contract, nor does it commit the Global Fund to pay any costs or expenses incurred in the preparation or submission of quotations. Bidders are solely responsible for their own expenses, if any, in preparing and submitting an offer to this RFQ.
5. The Global Fund may, at its discretion, extend the deadline for the submission of quotations or revise the Statement of Work, by issuing an amendment to this solicitation.

6. Option to Extend. The Global Fund intends to award a contract(s) for the period specified in this Solicitation. The Global Fund may, subject to the agreement of the parties, extend the(se) contract(s) for an additional period up to two times the period stated in this solicitation or any fraction of that time. The(se) contract(s) may be extended subject to good performance on the part of the contractor, the availability of funds and the needs of the Global Fund.

ATTACHMENT A: STATEMENT OF WORK FOR LEAD FACILITATORS

As a means of maximizing the relevance, clarity and measurability of Partnership Forum recommendations, the Global Fund routinely engages the services of a Facilitation Team working with the support and direction of a Lead Facilitator.

The Lead Facilitator supports and guides the Facilitation Team during Partnership Forum consultations and works closely with the Secretariat during meeting preparations and finalization of a report capturing recommendations to the Global Fund Board. A key function of the Lead Facilitators will be to support coherence of approach during each Partnership Forum, and across the multiple Partnership Forums.

To ensure a successful 6th Partnership Forum, the Global Fund is seeking the services of experienced Lead Facilitators to undertake the following work-streams:

A. Contribute to the development and review of meeting agenda, design and supporting materials for the Partnership Forum

- i. Review supporting materials and meeting design provided by the Secretariat and recommend adjustments to meet the needs and expectations of participants and Partnership Forum's objectives.
- ii. Review each element of the Partnership Forum agenda and identify facilitation team involvement and roles; develop a brief detailed guidance note on the facilitation approach for the breakout groups and expectations of the facilitation team, including specifically what their role will be in each of the facilitated sessions and how inclusive participation will be ensured among diverse stakeholders.
- iii. Pressure test the facilitation/consultation methodology and identify any potential issues and propose solutions in advance.
- iv. All the above should be applicable to in person and virtual meetings.

B. Facilitation team oversight, induction, training and team leadership

- i. In liaison with the Global Fund Secretariat, provide oversight and coordination for the team of facilitators engaged in these consultations.
- ii. Coordinate video pre-calls, including development of agenda and materials as needed, with the selected facilitation team to familiarize them with the content, methodology and their expected roles at the Partnership Forum meeting and prepare for sessions.
- iii. For in person Partnership Forum consultations: Coordinate on-site pre-event (up to 1 day) including development of agenda and materials as needed for pre-briefings and to develop a comprehensive team approach to the facilitation work. Adapt this preparatory meeting for a virtual setting.
- iv. Contribute to methodology for capturing input from breakout group discussions. Work with Secretariat to develop templates for rapporteurs to ensure consistency.
- v. Prepare short guidance notes for both facilitators and rapporteurs teams in advance to support a team-based consistent approach.
- vi. Work with the Secretariat staff to assign and finalize list of breakout session facilitators;
- vii. Prepare facilitators team and rapporteurs ahead of the Partnership Forum consultations to ensure professional, informed facilitation according to the principles and requirements set out in section C below.
- viii. All the above should be applicable to in person and virtual meetings.

C. Manage the recommendations process during the Partnership Forum consultation

In the capacity of Lead Facilitator guiding a diverse facilitation team:

- i. In collaboration with the Global Fund Secretariat, assist to manage the flow of the conference event, maintaining momentum and focus.
- ii. Support clarity in the formulation of specific, relevant recommendations by ensuring that participants have clearly understood the theme of each breakout or plenary session, the manner in which contributions are most helpfully made to enable recommendations to be evaluated and, as relevant, and acted upon.
- iii. Ensure that all participants have a space to voice their opinions and contributions during discussions, with a focus on ensuring that there is an appropriate balance between any subject-matter experts providing clarifications and hearing from the invited participants;
- iv. Aid the recommendations process by ensuring that rapporteurs are identified and clearly understand their role in the reporting process.
- v. Have and implement a documented system for key recommendations from breakout sessions to be quickly circulated through the facilitation team.
- vi. Participate in de-brief sessions with the Secretariat during the Partnership Forum meeting and make adjustments to the facilitation style and/or program based on their feedback.

D. Report on Partnership Forum recommendations and outcomes

- i. Work with breakout session facilitators and rapporteurs and Global Fund staff in a half-day post event/other means on capturing final recommendations for reporting at the final plenary session of the Partnership Forum.
- ii. Participate in a final de-brief session with the Secretariat after the Partnership Forum closing.
- iii. Prepare an outline of a final report, as needed, and receive Secretariat endorsement for the overall approach.
- iv. Coordinate inputs and prepare final reports, as needed on: (a) the Partnership Forum recommendations, noting action points; and (b) lessons learned for the Secretariat on the meeting, themes, facilitation team approach and self-evaluation and other items as identified as relevant by the facilitation team.
- v. If requested attend a Global Fund's Strategy Committee meeting to present recommendations and lessons learned.

KEY DELIVERABLES

This list comprises the suggested deliverables for the consultancy, however, additional ones may be required based on the needs of the project (e.g., moving to a virtual setting, or other):

- Review of materials and meeting methodology provided by the Secretariat
- List of facilitation team's roles at each stage of the agenda
- Agenda and materials for pre-briefings
- Short guidance notes for approach to the breakout groups and expectations of the facilitation team, including specifically what their role will be in each of the facilitated sessions and how inclusive participation will be ensured among diverse stakeholders.
- Standardized templates for rapporteurship of each breakout session and plenary discussions to ensure consistency of feedback

ESSENTIAL SKILLS AND EXPERIENCE

- Excellent communications, active listening and interpersonal skills
- Previous experience of facilitating conferences of over 200 people which involved translation teams, rapporteurs, and subject experts in an international setting

- Ability to develop, motivate, and lead a team
- Awareness of current issues in international health and development. Additional knowledge about relevant regions (ECCA, Latin America and the Caribbean, Africa, MENA, Asia) for the Partnership Forum consultations is a plus.
- Experience in working effectively with a broad range of stakeholders (private sector, government sector, civil society implementers, international organizations, community groups, and advocates)
- Demonstrated skills in effective participatory methodologies
- Demonstrated organizational and quality assurance skills
- Ability to synthesize information
- Demonstrated capacity to work under tight deadlines and produce high quality results
- Fluent in English (written and oral) plus other languages relevant to one or more Partnership Forum consultations (French, Spanish, Russian, Arabic)
- Familiarity with the Global Fund, especially around its Strategy, would be desirable

REMUNERATION

This scope of work will be covered by a consulting contract paid at a daily rate (to be defined) based on qualifications and experience and depending on the defined number of working days (estimated between 10-15 days).

PLACE OF WORK

Pending a final decision on the format of the Partnership Forum consultations, work performed during the term of this contract will be performed through virtual means and / or may entail some travel to meeting locations.

Should the Partnership Forum consultations take place in person, the facilitator may be requested to undertake travel at the request of the Secretariat to fulfill these Terms of Reference. All Global Fund related travel and expenses will be covered by the Global Fund's travel guidelines that will be made available to the selected Lead Facilitator at the time of contract signing. Travel expenses will be paid by the Global Fund separate to the facilitation fee.

ATTACHMENT B: STATEMENT OF WORK FOR FACILITATORS

The objectives of this consultancy are to:

1. Enable the active engagement of multi-stakeholder participants at the 6th Partnership Forum consultations, during in person meeting and/or a virtual setting as required, through use of appropriate, participatory methodologies during group sessions as outlined in the meeting agenda.
2. Lead facilitated sessions in a manner that (i) allows for and reconciles broad stakeholder views, and (ii) results in the identification of robust and clear recommendations for consideration into the development of the next Global Fund Strategy while ensuring easy comprehension for all audiences. This would include reporting on participant material presented during group and plenary sessions.
3. Ensure appropriate documentation of recommendations from the Partnership Forum, notably the group work, to provide a written record of deliberations.

METHODS

To maximize achievement of the Partnership Forum objectives, facilitators will be engaged in the following activities:

- A. Briefing session for familiarization of topics and team members (equivalent to 0.5 day):
Taking part in e-mail exchanges and video conference calls in advance of the official Partnership Forum consultation to become familiar with supporting materials and key themes, share information, clarify roles, contribute to the program and help prepare for sessions. *(During January 2021)*
- B. Preparatory meeting with the facilitation team (equivalent to 1 day):
Taking part in a preparation session to develop a comprehensive team approach to the facilitation work, review additional briefing materials, and exchange information on methodologies to maximize the opportunity for participant engagement in a virtual setting. *(Final date to be confirmed in January 2021)*
- C. Facilitation of the official Partnership Forum consultations (equivalent up to 3 days):
Providing high quality facilitation services in breakout and/or plenary sessions during a two/three day in person / virtual consultations, working with Global Fund staff members, interpreters, session informants, and the diverse group of participants. *(Partnership Forum consultations will be scheduled between late January and April 2021)*
- D. Collating materials and supporting delivery of a final consultation report and the provision of lessons learned materials for the Global Fund (0.5 day):
 - i. Taking part in a post event meeting to document lessons learned and support the production of the report capturing the key inputs from Partnership Forum discussions. *(To be scheduled following each of the official Partnership Forum consultations between end of January and April 2021)*
 - ii. Following the relevant Partnership Forum meeting, provide input into the draft report as requested by the Lead Facilitator. *(Equivalent to 0.5 day)*

DELIVERABLES

- Engage with resource persons and other key contacts as advised by the Global Fund Secretariat; ensure understanding of the meeting agenda, key themes, sensitivities and required outputs from the consultation.
- Participate in briefings and preparation meeting in a proactive way, bringing materials prepared in advance to support and have a common understanding of the Partnership Forum outcomes.
- Review of documentation and preparation of materials to facilitate breakout groups, and plenary sessions as needed, as assigned prior to the commencement of the Partnership Forum consultations.
- Take responsibility for assigned sessions by ensuring that:
 - a. For in person meetings: the room, IT and relevant materials (e.g. templates for report back) are prepared and ready; support identification of the group members and relevant allocation of all conference participants across different groups. Adapt these requirements to virtual meetings.
 - b. Relevant materials as basis for discussion and reporting (e.g. supporting slides, templates for report back, other) are prepared and ready.
 - c. The resource team (relevant Secretariat staff/rapporteur) are engaged and understand their roles, responsibilities, the process for the session and desired session output;
 - d. Present each session to participants as a safe space to share everyone’s contribution and participation (including agreements or ‘ground rules’). This includes providing clear guidance on the intention and objectives for the session, type of desired outcomes, guiding questions, and process for working together;
 - e. Facilitate group discussions in a way that maximizes participation by all group members, enables understanding and ownership of results, while making sure that groups record discussion outputs in the agreed formats;
 - f. Ensure that the Facilitation Team presents as a collaborative team – for example, providing mutual support, and participating in team ‘check-ins’ throughout.
- Brief any participants from assigned sessions who may be providing feedback in the plenary sessions on format and expectations around feedback and session outcomes.
- Contribute as needed and agreed to reporting back to the Plenary sessions on outcomes from breakout group sessions and propositions for consideration by the Global Fund’s Board, in a way that facilitates broad comprehension for all types of audiences.
- Take part in debrief and lessons learned session to feed into the next Partnership Forum events.
- Support the Lead Facilitator and the Global Fund Secretariat in the collation of a final report on lessons learned by the Facilitation Team.
- All the above should be applicable or adapted to virtual Partnership Forum consultations.

ESSENTIAL SKILLS AND EXPERIENCE

The expected minimum key competencies for the facilitator role are as follows:

- Excellent communications, active listening and interpersonal skills
- Previous proven experience in facilitating conferences/discussions of over 100 people and breakout groups involving collaboration with translation teams, rapporteurs, and subject experts in an international and diverse setting
- Experience in working effectively with a broad range of stakeholders (e.g., private sector, government sector, civil society implementers, international organizations, community groups, and advocates) with the ability to enable discussion and reconcile views with unbiased objectivity
- Demonstrated skills in effective facilitation and participatory methodologies
- Demonstrated organizational and quality assurance skills in the area of facilitation
- Ability to clearly reconcile and synthesize information for all type of audiences
- Demonstrated capacity to work under tight deadlines and produce high quality results
- Must be fluent in English (written and oral), and ideally one other language (French, Spanish, Russian, Arabic) (written and oral), for the relevant Partnership Forum consultation.
- Familiarity and being comfortable working and facilitating discussions in virtual environments.
- Awareness of current issues in international health and development in, at least one of the relevant regions (ECCA, Latin America and the Caribbean, Africa, MENA, Asia) for the Partnership Forum consultations.
- Familiarity with the Global Fund, especially around its Strategy, would be desirable.

TIMEFRAME AND REMUNERATION

The work shall cover the period for a period equivalent of 6-7 full working days, around the final dates for the relevant Partnership Forum meeting.

PLACE OF WORK

Pending a final decision on the format of the Partnership Forum consultations, work performed during the term of this contract will be performed through virtual means and / or may entail some travel to meeting locations.

Should the Partnership Forum consultations take place in person, the facilitator may be requested to undertake travel at the request of the Secretariat to fulfill these Terms of Reference. All Global Fund related travel and expenses will be covered by the Global Fund's travel guidelines that will be made available to the selected Lead Facilitator at the time of contract signing. Travel expenses will be paid by the Global Fund separate to the facilitation fee.

**ATTACHMENT C:
QUOTATION REQUIREMENTS AND EVALUATION CRITERIA**

The quotation must be submitted no later than **the date indicated in the RFQ information table on page 1 of this RFQ**.

Quotations which are submitted late or are incomplete may not be considered in the review process. All quotations must be submitted in English and can be in MS-Word, MS Power Point or pdf including applicable schedules where defined.

The quotation shall include the following:

1. Technical proposal responding to the Statement of Work;
2. CV for each Facilitator or Lead Facilitator candidate demonstrating relevant individual experience; and
3. Cost proposal.

A Global Fund will assess the extent to which the quotations submitted in response to this RFQ meet the evaluation criteria below:

For LEAD FACILITATORS:

SELECTION CRITERION (MANDATORY)	WEIGHT (maximum 100%)
Proven experience in facilitating conferences/discussions of over 200 people and breakout groups involving collaboration with translation teams, rapporteurs, and subject experts in an international and diverse setting, including proven experience facilitating meetings in a virtual setting , and demonstrated experience in effective facilitation and participatory methodologies	40
Awareness of current issues in international health and development. Additional knowledge about relevant regions (ECCA, Latin America and the Caribbean, Africa, MENA, Asia) for the Partnership Forum consultations, and/or familiarity with Global Fund and its Strategy and strategy development process would be an advantage.	30
Demonstrated ability to develop, motivate and guide a diverse facilitation team working in English, with other languages relevant to one or more Partnership Forum consultations (French, Spanish, Russian, Arabic)	20
Cost	5
Acceptance of the Global Fund Terms and Conditions of Purchase of Services (2018, as amended from time to time)	5

For FACILITATORS:

SELECTION CRITERION (MANDATORY)	WEIGHT (maximum 100%)
Proven experience in facilitating conferences/discussions of over 100 people and breakout groups involving collaboration with translation teams, rapporteurs, and subject experts in an international and diverse setting, including proven experience facilitating meetings in a virtual setting , and demonstrated experience in effective facilitation and participatory methodologies	40
Awareness of current issues in international health and development in at least one of the relevant regions (ECCA, Latin America and the Caribbean, Africa, MENA, Asia) for the Partnership Forum consultations. Familiarity with Global Fund and its Strategy and strategy development process would be an advantage.	30
Excellent communication skills and ability to clearly reconcile and synthesize information for all type of audiences. Fluency in English (written and oral), and ideally one other language for the relevant Partnership Forum region (French, Spanish, Russian, Arabic – written and oral)	20
Cost	5
Acceptance of the Global Fund Terms and Conditions of Purchase of Services (2018, as amended from time to time)	5

The bidders are requested to indicate the earliest start date and to hold the price quotation for 90 days from the deadline for submission. The Global Fund will make its best effort to finalize selection within this period. Any changes made to the quotation in advance of this should be notified in writing.

Contract award will be on the basis on obtaining best value for money whilst ensures the requirements of the Global Fund are effectively met. The Global Fund may (a) reject any or all quotations, (b) accept other than the lowest 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) cancel this RFQ.

The Global Fund may award a contract on the basis of initial quotations received, without discussions or negotiations. Therefore, each initial 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.

The Global Fund will be under no obligation to 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.