REQUEST FOR PROPOSAL FOR TFA COLLECTIVE ACTION AGENDA DEVELOPMENT
Contents
1. Introduction and instructions ................................................................................................................................................. 3
   1.1. Purpose of this Request for Proposal ......................................................................................................................... 3
   1.2. About the World Economic Forum and the Tropical Forest Alliance ........................................................................ 3
   1.3. Supplier Instructions ....................................................................................................................................................... 3
   1.4. Procurement Key Activities and Dates ....................................................................................................................... 4
   1.5. RFP Evaluation Criteria .................................................................................................................................................... 4
   1.6. Queries about the Procurement .................................................................................................................................... 5
   1.7. Proposal Submission Checklist ........................................................................................................................................ 5
   1.8. Points of contact .............................................................................................................................................................. 5
   1.9. Provided Information ....................................................................................................................................................... 5
   1.10. Confidentiality .............................................................................................................................................................. 6
   1.11. Cost of Responding ....................................................................................................................................................... 6
   1.12. RFP Errors ................................................................................................................................................................. 6
   1.13. Liability ......................................................................................................................................................................... 6
2. Specifications ........................................................................................................................................................................ 6
   2.1. Requirements ............................................................................................................................................................... 6
   2.2. Scope of work ............................................................................................................................................................... 7
   2.3. Description of the Deliverables ...................................................................................................................................... 7
   2.4. Timeline ........................................................................................................................................................................ 7
   2.5. Pricing ........................................................................................................................................................................... 7
   2.6. Capability Questions ..................................................................................................................................................... 8
1. Introduction and instructions

1.1. Purpose of this Request for Proposal

The purpose of this Request for Proposals (RFP) is to solicit proposals from suppliers with expertise in facilitating multi-stakeholder processes around commodity-driven deforestation. This process will result in the selection of one supplier, who will be invited to enter an open Master Services agreement under which specific deliverables will be contracted.

The selected vendor will provide facilitation services to advance the Tropical Forest Alliance’s Collective Action Agenda (CAA). The CAA, developed by TFA’s partners, charts a framework and an urgent call to action of what the broader TFA community must achieve together in the post-2020 period to enable a forest positive future. The CAA development process is supported by a working group composed of various stakeholders engaged with TFA and a rigorous consultation process has led to the development of a robust set of actions that the private sector, TFA secretariat and other stakeholders need to take to reduce commodity-driven deforestation. As a next step, the CAA will become a digital tool hosted on TFA’s website supported by a webinar in which the CAA will be formally launched. Over the course of the next months, the selected consultant will help with engaging partners on the CAA with the aim of building ownership and getting partner buy-in.

1.2. About the World Economic Forum and the Tropical Forest Alliance

The World Economic Forum is the International Organization for Public-Private Cooperation. The Forum engages the foremost political, business and other leaders of society to shape global, regional and industry agendas. It was established in 1971 as a not-for-profit foundation and is headquartered in Geneva, Switzerland. It is independent, impartial and not tied to any special interests. The Forum strives in all its efforts to demonstrate entrepreneurship in the global public interest while upholding the highest standards of governance. Moral and intellectual integrity is at the heart of everything it does.

Our activities are shaped by a unique institutional culture founded on the stakeholder theory, which asserts that an organization is accountable to all parts of society. The institution carefully blends and balances the best of many kinds of organizations, from both the public and private sectors, international organizations and academic institutions.

The Tropical Forest Alliance (TFA) is a global multistakeholder platform focused on reducing commodity driven deforestation. Hosted by the World Economic Forum, the TFA works with over 160 public, private and civil society actors to catalyse high-impact partnerships to address the inherent tensions that exist to grow production while protecting the forests - public and private, producer and market, global and local, people and the forest frontier. The TFA operates regional platforms in Latin America, West and Central Africa, China and Southeast Asia. It is supported by the Governments of the Netherlands, Norway, Germany and the UK, as well as the Gordon and Betty Moore Foundation.

1.3. Supplier Instructions

For ease of response and evaluation, Suppliers are required to complete and submit all components of this RFP.
Requested reference materials may be attached as Appendices. The World Economic Forum retains the right not to review any un-requested material.

Supporting information must be presented in the same order as the questions and must be referenced to the relevant question.

Questions must be answered in English.

Failure of a Supplier to provide the required information, make a satisfactory response to any question, or supply documentation referred to in responses, within the specified timescale, may mean that the Supplier will not be invited to participate further in the procurement.

Suppliers are asked to provide one electronic copy of the response in a format compatible with Microsoft Word. It is the supplier’s responsibility to ensure that the proposal and all other required documents are received at the e-mail address named in this document by the closing date specified.

Responses will not be returned.

Participants need to address all information specified by this RFP. All questions must be answered completely. The World Economic Forum reserves the right to verify any information contained in the participants RFP response, and to request additional information after the RFP response has been received.

Marketing brochures included must be submitted only as attachments and must not be used as a substitute for written responses. Nevertheless, suppliers should include any additional information that they think would help the Forum evaluate their proposal.

Furthermore, the proposal must be accompanied by a cover letter, signed by an individual authorized to bind the proposed entity (see Proposal Submission Checklist).

1.4. Procurement Key Activities and Dates

Suppliers are asked to provide the response by 14 February 2020, 6pm CET in electronic format to TFA@weforum.org.

Responses received after this time will not be considered.

1.5. RFP Evaluation Criteria

The Forum is looking for the most suitable partner and therefore will not simply select the economical most attractive bid or quotation, but rather use objective criteria to evaluate the best match for its demand. All supplier information provided as part of the RFP will be treated as confidential. The Forum’s criteria include, but are not limited to the following key factors:

- Conformity with requirements
- Product and required service pricing
- Implementation approach
- Quality of services as well as quality assurance
- Geographical coverage
- Demand flexibility
- Company values
The Forum will not disclose the detailed results of the selection and scoring process and reserves the sole right to decide whether a proposal complies with the requirements of the RFP and to accept, reject or negotiate modifications of supplier’s proposals.

1.6. Queries about the Procurement

Any questions about the procurement must be submitted by e-mail to TFA by 11 February 2020 at TFA@weforum.org. No other forms of communication or contact will be accepted. It is the World Economic Forum’s practice to communicate any question or request for clarification, with both the query and the response, in a suitably anonymous form, to all participating Suppliers. On a case by case basis if any information is deemed as confidential to a particular Supplier, this will be reviewed at the time it arises.

1.7. Proposal Submission Checklist

Proposals must include:

- A narrative describing previous experience in similar projects and answering the RFP Capability Questions in Section 2.6
- A maximum of 15 pages total
- A pricing proposal following the requirements in Section 2.5

1.8. Points of contact

Suppliers are not allowed to contact any World Economic Forum personnel, such as management or other local contacts, regarding this RFP. Any such communication may lead to the proposal received being rejected.

It is expected that the supplier also provides the World Economic Forum with a single point of contact capable of answering questions related to this RFP on a global scale.

World Economic Forum Contacts

<table>
<thead>
<tr>
<th>Name</th>
<th>Position</th>
<th>Email</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ornella Nicolacci</td>
<td>TFA Operations Lead</td>
<td><a href="mailto:ornella.nicolacci@weforum.org">ornella.nicolacci@weforum.org</a></td>
</tr>
</tbody>
</table>

1.9. Provided Information

This RFP contains information believed to be reliable at the date obtained but may not provide all the necessary or desirable information. Neither the World Economic Forum nor its employees or involved advisors, contractors or other representatives guarantee the completeness of these information. The document is intended solely for the information of the party to whom it is issued. All proposals will become the property of the Forum which reserves the right to use without limitations or liability for any ideas from the proposals.

The World Economic Forum reserves the absolute right to:

- Accept or reject any or all proposals
- Negotiate with any, all or no bidders
- Modify or cancel this RFP

It is the Bidder’s responsibility to:
• Properly understand and examine the RFP
• Examine all other information available on reasonable inquiry relevant to the risks, contingencies and circumstances affecting its response
• Satisfy itself as to the completeness, correctness and sufficiency of its response

1.10. Confidentiality

The Invitation document is confidential. The Forum may update or revise the document or any part of it. The recipient acknowledges that any such revised or amended document shall be received subject to the same confidentiality undertaking. The Recipient will not disclose or discuss the contents of the document with any officer, employee, consultant, director, agent, or other person associated or affiliated in anyway with the World Economic Forum or any of its customers or suppliers without the prior written consent of the World Economic Forum.

1.11. Cost of Responding

All costs and expenses incurred by bidders in any way associated with the development, preparation, and submission of their responses to this RFP, including but not limited to attendance at meetings, discussions, presentations, demonstrations, etc. and providing any additional information required by the Forum will be borne exclusively by the bidder.

1.12. RFP Errors

Each recipient should notify the World Economic Forum of any error or discrepancy found in this document. Notification should be made to the contact found in proposal related details.

1.13. Liability

This invitation is not an offer by the World Economic Forum, but an invitation for responses. No contractual obligation on behalf of the Forum whatsoever exists from this process unless and until a formal contract is signed and executed by authorized people of the Forum and the select bidder.

2. Specifications

2.1. Requirements

• The supplier must have a proven track record of facilitating multi-stakeholder processes on commodity-driven deforestation and have a strong network across businesses, governments and civil society organizations working in the space.
• The service provider must have deep experience in commodity-linked deforestation issues
• Proposals must describe:
  i. Proposed approach to partner engagement and methodology
  ii. Type of outreach/convenings (e.g. in-person meetings, webinars, social media, etc.)
  iii. Approach to building partners’ trust and ownership of CAA
• All proposals must show results achieved in similar prior experience
2.2. Scope of work

The work program will include facilitation of the Collective Action Agenda development and refinement process as well as the development and implementation of partner engagement strategies to advance the CAA. It includes the facilitation and preparation of a webinar and two working group calls, partner outreach and interviews and may involve issue-specific convenings as needed. Further, it also involves refining the CAA content and collaborating with the TFA team in transferring the content onto the TFA website.

Additional deliverables may be defined at a later point under the Master Services Agreement by issuing additional Statements of Work (SOW).

2.3. Description of the Deliverables

The service provider will submit to TFA:
1. An agenda, slide deck and facilitation guide for the CAA webinar (by early March)
2. An agenda, slide deck and facilitation guide for two working group calls (first by 21 February; second one week before second working group call (to be scheduled)).
3. Partner outreach documentation (on an ongoing basis)
4. Revised CAA content based on partner input (on an ongoing basis)
5. Further additional deliverables to be agreed upon under the Master Services Agreement

2.4. Timeline

Proposals are due 14 February 2020 and award will be made by 18 February 2020.

2.5. Pricing

- Proposals should be for a fixed price for the entire work, including all expenses and taxes, in Swiss Francs (CHF)
- Offers based on input-based pricing will not be considered
- Proposals will be evaluated on both total cost and on value-for-money

The products/services proposed by the prospective supplier must be aligned with the values, principles and criteria set out in the Forum’s Sustainable Procurement Policy.
## 2.6. Capability Questions

<table>
<thead>
<tr>
<th>Ref</th>
<th>Activity</th>
<th>Capability Question</th>
</tr>
</thead>
<tbody>
<tr>
<td>CAP001</td>
<td>Coverage</td>
<td>Please demonstrate your service coverage &amp; expertise (relevant to this RFP).</td>
</tr>
<tr>
<td>CAP002</td>
<td>Coverage</td>
<td>Please demonstrate your geographic coverage (relevant to this RFP).</td>
</tr>
<tr>
<td>CAP003</td>
<td>Gender Equality</td>
<td>How do you promote gender equality within your organisation?</td>
</tr>
<tr>
<td>CAP004</td>
<td>Implementation</td>
<td>What would the Forum Group need to do to enable you to carry out the required services?</td>
</tr>
<tr>
<td>CAP005</td>
<td>Knowledge Sharing</td>
<td>In which way do you propose to keep the Forum up to date on the latest developments in the area of this RFP?</td>
</tr>
<tr>
<td>CAP006</td>
<td>Knowledge transfer</td>
<td>Please describe how you ensure knowledge transfer takes place both during and at the end of an engagement.</td>
</tr>
<tr>
<td>CAP007</td>
<td>Quality &amp; standards</td>
<td>Does your company operate a standard problem reporting and resolution procedure?</td>
</tr>
<tr>
<td>CAP008</td>
<td>Quality &amp; standards</td>
<td>Please list the standards you currently have certification for (e.g. ISO9001, ISO14001) and provide the dates on which these were achieved.</td>
</tr>
<tr>
<td>CAP009</td>
<td>Quality &amp; standards</td>
<td>The Forum will not allow consultancies to use any third party suppliers as subcontractors to deliver the service unless specifically authorised by the Forum. Do you agree to these terms?</td>
</tr>
<tr>
<td>CAP010</td>
<td>Team</td>
<td>Please present your proposed team, including CVs.</td>
</tr>
<tr>
<td>CAP011</td>
<td>Team</td>
<td>Which other clients have been serviced / are currently serviced by the proposed team?</td>
</tr>
<tr>
<td>CAP012</td>
<td>Other</td>
<td>What special talents and expertise does your firm have which separates you from other top tier firms?</td>
</tr>
</tbody>
</table>