CGIAR System Organization

Resource Mobilization, Communications, and Advocacy Strategy Specialist(s)

Request for ProposaL

Table of Contents

[1. Introduction and Background: 3](#_Toc172547041)

[2. Scope of Work 3](#_Toc172547044)

[3. Deliverables 3](#_Toc172547045)

[4. Qualifications and Experience 3](#_Toc172547046)

[5. Project timeline 3](#_Toc172547047)

[6. Performance Measurement and Review: 3](#_Toc172547048)

[7. Legal Considerations 4](#_Toc172547049)

[7.1 Confidentiality 4](#_Toc172547050)

[7.2 Contracting 5](#_Toc172547051)

[7.3 Conflicts of Interest 5](#_Toc172547052)

[7.4 Payment Terms 6](#_Toc172547053)

[8. Required Proposal Content: 6](#_Toc172547054)

[a) Technical Proposal 6](#_Toc172547055)

[b) Financial Proposal 7](#_Toc172547056)

[9. Proposal Evaluation 7](#_Toc172547057)

[a) Evaluation Criteria: 7](#_Toc172547058)

[b) Evaluation Process 9](#_Toc172547059)

[c) Weighting System 9](#_Toc172547060)

[10. Bid Schedule and Dates: 10](#_Toc172547061)

[11. Communication during RFP period 10](#_Toc172547062)

[12. How to submit a proposal: 10](#_Toc172547063)

[Annexes 12](#_Toc172547064)

## Introduction and Background:

## CGIAR is seeking proposals from qualified consulting firms to help co-develop a comprehensive Resource Mobilization, Communications, and Advocacy Strategy – with a view to the next five years. A specific focus will be placed on preparing the organisation for a proposed replenishment moment in 2025. This strategy should support CGIAR’s aims to achieve an annual funding ambition of $2 billion annually by 2030 to support its global agenda to transform food, land, and water systems in a climate crisis.

## CGIAR is the world’s largest publicly funded agricultural research, driving innovation to build resilient food systems in the face of climate change, environmental degradation, and population growth. Building on the success COP26 and COP28 pledging moments, CGIAR is now in the process of preparing a new research portfolio and refreshed investment campaign for launch in 2025. To enhance its impact and mobilize the necessary resources, CGIAR is putting in place a lean and fit-for-purpose external relations group to accelerate the growth of CGIAR funding and elevate its global influence and presence. This strategy will also help to effectively support and deploy CGIAR’s new executive leadership that has been recently established.

## Scope of Work

The selected consultant will work collaboratively with CGIAR leadership, resource mobilization, communication and advocacy teams to co-design and develop a comprehensive Strategy within a three-month timeframe. This strategy will address the following key areas:

* **Donor Market Analysis, Segmentation and Growth:** Build on the IFRM Strategy refresh to advance analysis of the current and potential donor landscape, identifying key funding sources such as traditional bilateral and multilateral donors, private sector and philanthropies.
* **Strategic Communication & Advocacy:** Design a complementary communications and advocacy plan to raise awareness of CGIAR’s work and its critical role in achieving global food security goals aligned with RM, advocacy and science objectives.
* **Resourcing & Operation Requirements:** Assess the operations, modalities and resource needs required to effectively implement a replenishment campaign, including donor engagement, proposal development, and relationship management.
* **Replenishment Strategy:** Develop a targeted strategy for the 2025 replenishment, outlining key fundraising targets, engagement activities, and communication materials.

## Deliverables

The successful consultant will deliver the following co-developed materials:

* **A comprehensive strategy document** outlining the key findings, recommendations, and action plan.
* **A donor segmentation analysis** with specific funding opportunities for each segment.
* **A replenishment roadmap** to COP30 (or other milestone moment)
* **A concise and compelling set of slides** detailing the strategy for internal use.

## Qualifications and Experience

CGIAR is seeking a highly qualified consulting firm/team with a proven track record in developing and implementing successful resource mobilization, advocacy, communications and/or replenishment strategies for large international organizations. The ideal firm will have:

* **Extensive experience** in the global fundraising landscape, particularly for international agricultural research, food security, and/or climate change – ODA and non-ODA sources.
* **Strong analytical skills** and the ability to conduct thorough market research.
* **Proven experience** in managing consultative projects and delivering high-quality results within a defined timeframe.

## Project timeline

|  |  |
| --- | --- |
| **Dates** | **Milestones** |
| TBD | Contract kickoff date |
| 06 Sept 2024 | Draft outline provided |
| 13 Sept 2024 | Outline agreed and sign-off by CGIAR |
| 27 Sept 2024 | First Complete Draft / Slide templates |
| 09 Oct 2024 | Feedback provided by CGIAR |
| 18 Oct 2024 | Updated Drafts / full draft slide deck |
| 31 Oct 2024 | Last revisions and document delivery deadline |

## Performance Measurement and Review:

* 1. **Key Performance Indicators (KPIs)**
* Quality of Work: The consultant's work will be assessed based on the submitted deliverables' accuracy, completeness, and quality.
* Timeliness: The consultant will be evaluated on their ability to meet deadlines and milestones as outlined in the timeline.
* Client Satisfaction: Feedback from project stakeholders and team members regarding the consultant's professionalism and effectiveness.
* Stakeholder Surveys: Structured and documented surveys indicating the stakeholders' feedback on the quality of the services received. This is required when the services include training, workshops, or similar deliverables.
* Adherence to Budget: The consultant's ability to stay within the allocated budget for the project.
* Communication effectiveness: The clarity, frequency, and responsiveness of the consultant's communication throughout the project.
* Actionable recommendations: The number and quality of practical recommendations for optimizing specific funding opportunities, developing resource needs required to effectively implement a replenishment campaign
  1. **Performance Review**

The CGIAR Innovative Finance and Resource Mobilization (IFRM) Group will conduct performance reviews at the halfway mark and the end. Feedback to the consultant will be provided via Teams meeting. If there are performance concerns, additional meetings may be called. The performance review will be convened by Nicolaas van der Wilk and additional members as requested. The convenors will document the performance reviews, including the consultant’s responses, and will share them with the consultant after each session.

The Firm/Consultant will have the opportunity to respond to the feedback, offering insights into their performance, challenges faced, and the strategies employed for issue resolution and project advancement. A collaborative approach will be adopted to identify areas of improvement and the necessary steps to enhance performance in subsequent processes/phases.

## Legal Considerations

### Confidentiality

To ensure information security throughout this RFP process, all information disclosed by CGIAR ("Discloser") and all information submitted by the Consultant in response (including technical details, pricing information, and business plans) will be considered confidential. This information can only be used for proposal preparation and cannot be disclosed to any external party without our prior written consent. Exceptions include the Consultant's employees or advisors needing the information for proposal development, provided they are bound by confidentiality obligations at least as strict as those outlined here. The Consultant must ensure any subcontractors, or third parties involved in the engagement are bound by similar confidentiality obligations. The Consultant is responsible for protecting this information with the same care given to their own confidential data and remains liable for any breaches by subcontractors or third parties. CGIAR acknowledges the information's value and the potential harm from a breach, so the Consultant's confidentiality obligations extend beyond the proposal deadline and remain in effect for ten years from the RFP date.

By submitting a proposal, the Firm/individual commits to the following:

1. All information obtained during the engagement with CGIAR will be stored only on CGIAR servers/systems.
2. None of the information obtained during the engagement with CGIAR shall be shared with any other party for any reason.
3. The provided access by CGIAR shall only be used for this project and to communicate with CGIAR and only for this project.
4. Access to Confidential Information will be limited to those of its employees or contractors who have a legitimate need to know such information for the project and who have agreed in writing to be bound by the terms of this NDA.
5. All reasonable precautions will be taken to prevent the unauthorized disclosure or use of Confidential Information, including but not limited to implementing and maintaining adequate security measures.
6. Access to CGIAR systems shall only be made from trusted machines with current protection standards.
7. Access to CGIAR systems shall not be made from any sanctioned country by US laws applicable to MS products.

### Contracting

The Firm should accept the CGIAR System Organization standard terms and conditions of contract in Appendix 1.

If the Firm requires amendment of specific clauses, the firm must submit those contract clauses or the Firm’s template for our review and consideration. **Please submit it in Word format as a separate document, along with the Firm’s confirmation of intent to submit a proposal**

CGIAR reserves the right to request additional information or clarification regarding the contract clauses or templates during the evaluation process. Submitting suggested clauses or templates does not guarantee that the firm will be awarded the contract. Final contract negotiations will be conducted with the selected firm based on the evaluation results.

### Conflicts of Interest

To ensure a fair and objective selection process, the Consultant guarantees they have no conflicts of interest (financial or otherwise) that could influence their work on this project. They must disclose any potential conflicts immediately, with details and proposed mitigation strategies (like staff recusal or information firewalls). CGIAR has the right to reject proposals with unmanageable conflicts and terminate the agreement for breaches. The Consultant is also responsible for ongoing monitoring and disclosure of new conflicts. Any confidential information they share about potential conflicts will be kept confidential by us, except for evaluation or breach-related actions.

### Payment Terms

Standard payment terms will be Net 30 days from the date of invoice receipt. The invoicing schedule may vary based on the approach outlined in the prospective firm's commercial proposal. Firms have the option to invoice either on the basis of measurable progress throughout the project or upon the submission and subsequent acceptance of final deliverables by CGIAR. This flexibility allows for alignment with the firm's preferred billing structure while ensuring that payments are made in a timely manner following the standard Net 30-day policy.

## Required Proposal Content:

This RFP document is not intended to limit the Firm’s submission content but rather to provide a framework for CGIAR to evaluate each proposal and determine which submission most closely addresses the needs. Firms are encouraged to provide any additional information or innovative approaches not specifically outlined in this RFP. Firms will provide any reasonable additional information upon request by the CGIAR.

### Technical Proposal

[Consultant/Firm profile]

* Name: Clearly state the name of the Consultant (lead consultant for consortium).
* Primary Contact: Provide the name and title of the contact person.
* Contact Information: Include the full mailing address, e-mail address, and telephone number for direct communication.
* Overview: A summary of the firm’s business operations / CVs for individuals

[Experience and Team Composition]

* Extensive experience in the global fundraising landscape, particularly for international agricultural research, food security, and/or climate change – ODA and non-ODA sources.
* Strong analytical skills and the ability to conduct thorough market research.
* Proven experience in managing consultative projects and delivering high-quality results within a defined timeframe.

[Project Methodology and Timelines]

* Description of the proposed process to fulfill the Scope of Work, Deliverables, and expectations outlined in the RFP.
* Outline the key milestones, responsibilities, level of effort, and proposed timelines

### Financial Proposal

Proposed fees should be presented in US$ excluding taxes. The Proposal should indicate the costs while detailing the deliverables /milestones.

Provide a breakdown of the deliverables/milestones in US$(excluding taxes) including any budgetary assumptions made, contingency and mitigation actions.

Identification of any project element to be subcontracted (if any), showing number of subcontractor hours and their hourly rates.

The below is an example:

|  |  |  |  |
| --- | --- | --- | --- |
| **Resource/Role** | **Day rate (US$)** | **Total Days/Input** | **Sub-total fees(US$)** |
| Team Leader |  |  |  |
| Expert 1 |  |  |  |
| Expert 2 |  |  |  |
|  |  |  |  |
| **Total** |  |  |  |

## Proposal Evaluation

The purpose of this section is to outline the evaluation criteria and process that will be used to assess and select the most qualified Consultant.

### Evaluation Criteria:

In the selection of the ideal Firm for this project, a comprehensive evaluation will be conducted. As a global organization, CGIAR is agnostic to the location of the Consultants that participate in delivering the scope of work outlined in this RFP; however, flexibility in consideration of CGIAR’s global stakeholders and constituents is necessary, and any challenges should be addressed in the proposal.

#### Proposal Alignment:

Expectation: The Firm’s proposal should be clear, concise, and directly aligned with our specific requirements, demonstrating a thorough understanding and thoughtful approach to the CGIAR’s objectives and outlined deliverables.

#### Experience:

Expectation: The submission of relevant case studies that highlight the Firm's experience and success in similar projects. The showcased experience should resonate significantly with the needs and requirements of CGIAR.

#### Reputation and References:

Expectation: Provision of contact information for at least two previous clients or references who can attest to the Firm’s competence, professionalism, and reliability in delivering high-quality service.

#### Project Management and Communication:

Expectation: Evidence of the Firm’s proven strategies and tools for effective project management and communication, ensuring smooth collaboration, timely updates, and the efficient resolution of any issues or concerns.

#### Contractual and Legal Compliance:

Expectation: Assurance that the Firm comprehensively complies with all legal requirements and offers a transparent, fair contract that safeguards our interests.

#### Data Security and Privacy:

Expectation: Confirmation that the Firm adheres to industry best practices for data security and privacy, ensuring the utmost protection of sensitive information.

#### Cost and Budget:

Expectation: A clear, detailed breakdown of the Firm’s proposed fees including details of any assumptions.

#### Timeline and Deliverables:

Project Timeline:

Expectation: Presentation of a realistic yet flexible project timeline, ensuring the timely completion of deliverables without compromising quality.

Deliverables:

Expectation: Explicit definition of the scope of work and anticipated deliverables, ensuring they robustly align with CGIAR’s requirements.

CGIAR reserves the right to progress with all, one, or multiple activities of a bidder’s response based on its performance against the evaluation criteria.

### Evaluation Process

The evaluation will be conducted based on the criteria outlined in this RFP. The RFP timeline may be modified if needed to benefit the RFP results while keeping interested parties well informed.

**Evaluation Panel:** An evaluation panel will be established to review and evaluate all proposals received. The panel will consist of representatives from CGIAR's relevant departments. The panel members will be selected based on their expertise and experience relevant to the RFP.

**Evaluation Criteria:** The panel will evaluate each Firm’s technical capabilities, including team composition, proposed approach and methodology, references, and cost.

**Evaluation Process:** The evaluation process will consist of the following steps:

**Proposal review:** The panel will review all qualified proposals, assessing them against the evaluation criteria outlined in this RFP.

**Evaluation and Scoring:** The evaluation panel will evaluate each shortlisted Firm’s proposal and presentation based on evaluation criteria. The scoring system listed below will be used to ensure consistency and objectivity in the evaluation process.

**Firm Selection:** After completing the evaluation scoring, the panel will recommend the selection of the Firm that best meets the RFP requirements and evaluation criteria.

**Confidentiality and Conflict of Interest:** All evaluation panel members will be required to sign a Conflict-of-Interest statement and treat all information submitted by participating firms as confidential and used solely for the purpose of Firm selection.

### Weighting System

|  |  |
| --- | --- |
| **Technical Criteria** | **Weight (100)** |
| **Technical Approach and Methodology:** Evaluation of the proposer's understanding of CGIAR’s research mission and their detailed approach and methodology including timelines. | (25%) |
| **Experience and Qualifications:** Assessment of the contractor’s experience. Qualifications of the team members designated for this project will also be considered, including references and Track Record Positive client references.  Extent of technical expertise in the fields of climate change adaptation and mitigation in agrifood systems, climate-smart agriculture and agricultural economics. | (25%) |
| **Past Performance** Review of references and past performance on similar projects. Provide sample case studies | (20%) |
| **Cost Proposal:** Evaluation of the overall financial feasibility of the proposal, ensuring that the cost is reasonable and provides value for money within the scope of work defined. | (30%) |

## Bid Schedule and Dates:

The following schedule includes key milestones and their associated completion dates and is provided primarily for planning purposes. CGIAR System Organization may modify the project timeline at its discretion.

|  |  |
| --- | --- |
| **Dates** | **Milestones** |
| 23 July 2024 | Issuance of Request for Proposals |
| 25 July 2024 | Prebid- Conference/meeting (opportunity to clarify the ask including timelines and Q&A with bidders) |
| 24 – 26 July 2024 | Confirmation of intent to submit a proposal |
| 24 – 26 July 2024 | Submit RFP questions or requests for clarification by this date |
| 29 July 2024 | Responses to questions provided by CGIAR |
| 05 August 2024 | Deadline for submission of proposal. |
| 09 August 2024 | Notification of Award to the successful firm |
| 14 August 2024 | Contract signed |
| TBD | Contract start date – Kickoff induction program |

## Communication during RFP period

CGIAR intends to run a fair bidding process where all respondents are given equal opportunity to put forward their best proposal. As such, any material questions asked by bidders will be collated, answered, and shared with all bidders before the RFP closes.

Submit your questions through the email smo-bidding@cgiar.org

## How to submit a proposal:

Please submit a narrative proposal and a fee proposal as two separate documents to [smo-bidding@cgiar.org](mailto:smo-bidding@cgiar.org). Both documents can be attached to the same email.

All proposals must be received by 05 August 2024 at 11:59 PM, Paris time. Only electronically submitted proposals will be considered.

## Annexes

Annex 1: CGIAR standard terms and conditions of contract

Annex 2: [With Science We Can](https://cgspace.cgiar.org/server/api/core/bitstreams/67554c01-d72f-47c9-a3d1-c12785df43bd/content)

Annex 3: [IFRM Strategy 2023 - 2024](https://storage.googleapis.com/cgiarorg/2023/10/SC19-09_WorkingDraft-IFRM-2023-24-strategy.pdf)

Annex 4: [Example Time Sheet](Example%20Time%20Sheet) – Vendors can use this template, the <https://clockify.me/> App or their preferred method of activity and time reporting – the essential is that activities and time billed for are clearly recorded.