

## Request for Proposal (RFP)

Subject RFP #:	RFP-CATALYZE-WB-2024-103
RFP Issue Date:	August 21, 2024
Terms of Reference / Specifications:	CATALYZE Serbia Final Conference Organizer
Project	USAID CATALYZE Western Balkans Engines of Growth
The Company	Palladium International, LLC
Country of Performance	Serbia
Closing Date and Time	September 4, 2024
Details for Submission	Submissions will be accepted: Electronically: email to <a href="mailto:jasna.dimovski@thepalladiumgroup.com">jasna.dimovski@thepalladiumgroup.com</a>
Offer Validity Period	30 days

Thank you for your interest in the above procurement. As implementer for the CATALYZE Innovative Blended Finance Project funded by United States Agency for International Development (USAID), Palladium invites you to submit a proposal for the scope of work attached in Annex A. Your proposal must be valid for the Validity Period.

Please submit your proposal in accordance with the Details for Submission above by the Closing Date and Time. This RFP in no way obligates Palladium to award a contract nor does it commit Palladium to pay any cost incurred in the preparation and submission of a proposal. Palladium bears no responsibility for data errors resulting from transmission or conversion processes.

If you have any queries, please contact the Engines of Growth Grants and Procurement Specialist Jasna Dimovski at +389 71 396 107 or by e-mail [jasna.dimovski@thepalladiumgroup.com](mailto:jasna.dimovski@thepalladiumgroup.com).

Yours sincerely,

Jasna Dimovski  
Grants and Procurement Specialist

## Terms and conditions

### 1. Proposal Conditions

By submitting a proposal, potential suppliers are bound by these terms and conditions. Potential suppliers must submit offers with all details provided in English and with prices quoted in a single currency.

### 2. Proposal Lodgement

The Company may grant extensions to the Closing Time at its discretion. The Company will not consider any quotes received after the Closing Time specified in the RFP unless the Company determines to do so otherwise at its sole discretion.

### 3. Evaluation

The Company may review all proposal to confirm compliance with this RFP and to determine the best proposal in the circumstances.

### 4. Alterations

The Company may decline to consider a proposal in which there are alterations, erasures, illegibility, ambiguity or incomplete details.

### 5. The Company's Rights

The Company may, at its discretion, discontinue the RFP; decline to accept any proposal; terminate, extend or vary its selection process; decline to issue any contract; seek information or negotiate with any potential supplier that has not been invited to submit a proposal; satisfy its requirement separately from the RFP process; terminate negotiations at any time and commence negotiations with any other potential supplier; evaluate proposals as the Company sees appropriate (including with reference to information provided by the prospective supplier or from a third party); and negotiate with any one or more potential suppliers.

### 6. Amendments and Queries

The Company may amend, or clarify any aspect of the RFP prior to the RFP Closing Time by issuing an amendment to the RFP in the same manner as the original RFP was distributed. Such amendments or clarifications will, as far as is practicable be issued simultaneously to all parties.

Any queries regarding this RFP should be directed to the Contact Person identified on the cover page of this RFP.

### 7. Clarification

The Company may, at any time prior to execution of a contract, seek clarification or additional information from, and enter into discussions and negotiations with, any or all potential suppliers in relation to their proposals. In doing so, the Company will not allow any potential supplier to substantially tailor or amend their proposal.

### 8. Confidentiality

In their proposal, potential suppliers must identify any aspects of their proposal that they consider should be kept confidential, with reasons. Potential suppliers should note that the Company will only agree to treat information as confidential in cases that it considers appropriate. In the absence of such an agreement, potential suppliers acknowledge that the Company has the right to disclose the information contained in their proposal.

The potential supplier acknowledges that in the course of this RFP, it may become acquainted with or have access to the Company's Confidential Information (including the existence and terms of this RFP and the TOR). It agrees to maintain the confidence of the Confidential Information and to prevent its unauthorised disclosure to any other person. If the potential supplier is required to disclose Confidential Information due to a relevant law or legal proceedings, it will provide reasonable notice of such disclosure to the Company. The parties agree that this obligation applies during the RFP and after the completion of the process.

### 9. Alternatives

Potential suppliers may submit proposals for alternative methods of addressing the Company's requirement described in the RFP where the option to do so was stated in the RFP or agreed in writing with the Company prior to the RFP Closing Time. Potential suppliers are responsible for providing a sufficient level of detail about the alternative solution to enable its evaluation.

### 10. Reference Material

If the RFP references any other materials including, but not limited to, reports, plans, drawings, samples or other reference material, the potential supplier is responsible for obtaining the referenced material and considering it in framing their proposal. And provide it to the Company upon request.

### 11. Price/Cost Basis

Prices or costs quoted must show the tax exclusive price, the tax component and the tax inclusive price.

The contract price, which must include any and all taxes, supplier charges and costs, will be the maximum price payable by the Company for the Goods and/or Services.

### 12. Financial information

If requested by the Company, potential suppliers must be able to demonstrate their financial stability and ability to remain viable as a provider of the Goods and/or Services over the term of any agreement.

If requested by the Company, the potential supplier must promptly provide the Company with such information or documentation as the Company reasonably requires in order to evaluate the potential supplier's financial stability.

### 13. Referees

The Company reserves the right to contact the potential supplier's referees, or any other person, directly and without notifying the potential supplier.

### 14. Conflict of interest

Potential suppliers must notify the Company immediately if any actual, potential or perceived conflict of interest arises (a perceived conflict of interest is one in which a reasonable person would think that the person's judgement and/or actions are likely to be compromised, whether due to a financial or personal interest (including those of family members) in the procurement or the Company).

### 15. Inconsistencies

If there is inconsistency between any of the parts of the RFP the following order of precedence shall apply:

- (a) these Terms and Conditions;
- (b) the first page of this RFP; and
- (c) the Schedule

so that the provision in the higher ranked document will prevail to the extent of the inconsistency.

### 16. Collusion and Unlawful Inducements

Potential suppliers and their officers, employees, agents and advisors must not engage in any collusive, anti-competitive conduct or any other similar conduct with any other potential supplier or person or quote any unlawful inducements in relation to their proposal or the RFP process.

Potential suppliers must disclose where proposals have been compiled with the assistance of current or former the Company employees (within the previous 9 months and who was substantially involved in the design, preparation, appraisal, review, and or daily management of this activity) and should note that this may exclude their proposal from consideration.

Potential suppliers warrant that they have not provided or offered any payment, gift, item, hospitality or any other benefit to the Company, its employees, consultants, agents, subcontractors (or any other person involved in the decision-making process relating to this RFP) which could give rise to a perception of bribery or corruption in relation to the RFP or any other dealings between the parties.

### 17. Jurisdiction

This RFP shall be subject to the laws of the District of Columbia, United States of America. The language of the arbitration will be English.

The Potential Supplier and the Company will use their best efforts to settle amicably any dispute, controversy, or claim arising out of, or relating to this RFP or the breach, termination, or invalidity thereof. If no agreeable settlement can be found, any dispute, controversy, or claim arising out of or relating to this RFP or the breach, termination, or invalidity thereof, shall be settled by mediation through the American Arbitration Association by filing a request for mediation with the AAA and the other party. The Parties will be bound by any arbitration award rendered as a result of such arbitration as the final adjudication of any such dispute.

## Company Information

Palladium is a global leader in the design, development and delivery of Positive Impact — the intentional creation of enduring social and economic value. We work with corporations, governments, foundations, investors, communities and civil society to formulate strategies and implement solutions that generate lasting social, environmental and financial benefits.

## Project Background

USAID CATALYZE is a global project designed to facilitate partnerships and craft solutions to mobilize \$2 billion in blended private sector and other financing to USAID partner countries. The program can work in any development sector or region, enabling USAID Bureaus and Missions around the world to efficiently facilitate investment solutions that respond to the needs of specific sectors, issues, and geographies and leverage private sector financing to achieve development objectives.

The CATALYZE **Engines of Growth (EoG)** Activity (2020-2024) is one of the activities under the global CATALYZE project. The EoG Activity engages market actors and other stakeholders to identify and co-design key opportunities to improve small-to-medium sized enterprises' (SMEs) access and utilization of appropriate financial products and services in the Western Balkans. EoG also explores how blended finance approaches can effectively catalyze finance for both vulnerable SMEs and those with a high growth potential in the Western Balkans. EoG also focuses on supporting women-owned SMEs (W-SMEs) in the region to improve resilience and promote recovery and growth, while also examining the key barriers and enablers for success. The Activity goal is to mobilize over \$110 million in financing for enterprises as a result of USG assistance, including \$45 million for W-SMEs in the region. EoG has exceeded these goals and continues to mobilize private capital in the region. Specific project achievements in catalyzing new financing products & services include:

- **Private Equity:** Established an Asset Management Company, which led to the creation of a regional VC Fund, Omorika; developed a viable pipeline of investment-ready SMEs through technical assistance, training, mentoring and administrative and transactional support; mobilized approximately \$18 M in private capital.
- **Digital Financing and Fintech:** Supported the development of various platforms and tools to support SMEs including: an e-factoring platform, which enables invoice trading and supply chain financing, and supports SMEs in maintaining liquidity and managing account receivables; a matchmaking platform for FIs and SMEs, providing easy access to tailored loan information and applications; a risk assessment tool, developed by a local FinTech for Western Balkans financial institutions, enabling cash flow-based financing and SME access to finance via bank statements analysis instead of collateral, niche loan products: green and bridge gap loans, tailored for W-SMEs, factoring, offered via LORES+ fintech platform; and crowdinvesting campaigns that support SMEs to gather funds on Ventu.rs platform. There have been two successful crowdinvesting campaigns to date.
- **Embedded Financing:** Implementing two pilots introducing embedded financing to SMEs in the region; integrating all e-factoring offers into SEF system; and integrating e-factoring into a marketplace. Embedded lending offers SMEs integrated access to financial services and products within existing platforms, enabling convenient capital access and streamlined operations without collateral or lending history requirements.
- **Microfinance:** EoG has supported partners to develop new loan products that increase lending to businesses operating in the footwear and apparel sector, with predominantly W-SME presence.
- **Business Advisory Service Providers (BASPs) network:** Created a network of nearly 50 BASPs across the Western Balkans, mobilizing financing throughout the region.

By the end of June 2024, EoG had mobilized over \$160M in financing for enterprises as a result of USG assistance; this includes over \$45M for W-SMEs. More than 2,700 SMEs benefited from technical assistance and/or financial services provided by EoG, 1,100 of those were W-SMEs.

## Purpose

EoG seeks agency services for the preparation of project legacy materials and support in organizing a hybrid close-out event that will take place in the first week of November 2024 in Belgrade, Serbia. A complete scope of work is attached as Annex A.

### **Type of Contract**

This award will be a firm fixed price contract not exceeding \$90,000

### **Anticipated Contract Period of Performance**

September 13 through November 30, 2024.

### **Place of Performance**

The activities to be performed under this contract will take place in: Belgrade, Serbia; Skopje, North Macedonia; and Tirana, Albania.

### **Instructions to Offerors**

Separate technical and cost proposals must be submitted by email no later than the time and date specified on the cover page.

#### **1. Technical Proposal**

For the technical proposal, the offeror must submit:

- (a) Company Profile
  - a. Organization's contact information and address
  - b. Type of enterprise or organization
  - c. Signature of an authorized representative of the organization
  - d. UEI number (if applicable)
- (b) Capability Statement
  - a. Past Performance – please provide information regarding your past performance in the Western Balkans region, Serbia events in particular; examples of videos produced and photos from the events
  - b. Portfolio – please submit a portfolio that demonstrates the company's ability to develop creative concepts for events and legacy materials. The portfolio should showcase the company's expertise in crafting solutions that align with the project's needs and objectives, effectively capture the essence and goals of the project and the closing event and resonate with the target audience.
  - c. For Videographer and Photographer, please send part of previous work (videos and pictures as references),
  - d. For the Host/Moderator, please send reference list from past performance.
  - e. For Economics/Finance expert, please send reference list from past performance.
- (c) Creative Concept
  - a. Submit Creative Concepts for both the hybrid closing event and project legacy materials as described in Annex A: Scope of Work
- (d) Reference Information (Name of Contact, Relationship to Bidder, Contact Information) for 3 professional references
- (e) Current registration form of the service provider not older than 6 months
- (f) All supporting documentation specified below in the pass/fail evaluation criteria.

#### **2. Cost Proposal**

Offerors must submit a cost proposal. CATALYZE will provide a budget template upon request through [jasna.dimovski@thepalladiumgroup.com](mailto:jasna.dimovski@thepalladiumgroup.com). The cost proposal consists of:

- (a) Budget in Microsoft Excel with all formulas visible (unlocked), including all items listed in Annex B: Services Requested
- (b) Accompanying Word Document with all cost assumptions and explanations

#### Key assumptions

- Budget in USD
- All prices are to be inclusive of relevant taxes
- Separate unit cost and number of units
- Break down activity costs into as much detail as possible
- Offeror should budget for:
  - Defense Base Act (DBA) insurance in accordance with FAR 52.228-3, as applicable.

The selected offeror will be required to complete the Due Diligence Questionnaire and provide a UEI number within 5 days of being notified of selection.

### Submission of Offers

Electronic proposals must be submitted by sending two separate emails, one for technical proposal and one for cost proposal with the RFP number in the subject lines. The RFP number can be found on the cover page.

Offers received past the deadline stated on the cover page will be deemed non-responsive and will not be considered for award.

### Evaluation and Award Process

Proposals will be evaluated using a best value trade off methodology. This is a three-stage process.

- (1) The first set of criteria is graded on a pass/fail basis. Offerors must meet the following minimum eligibility qualification criteria and provide supporting documentation:

	Requirement	Supporting Documentation
(a)	Must be a registered legal entity in Serbia, North Macedonia, or Albania for a minimum of one year	Copy of certificate or articles and memorandum of associate
(b)	Must not have any active exclusions from the working with the US government ( <a href="http://www.sam.gov">www.sam.gov</a> ), the UN (Sanctions List), or the US Department of the Treasury Office of Foreign Asset Control	N/A

- (2) If these minimum criteria are met, the offer's technical proposal will be evaluated as follows:

Evaluation Criteria	Documents Evaluated	Points
Demonstrated experience executing events and conferences of similar size and scope	Past performance write-up. Inclusion of 3-5 examples including client names (unless restricted by the client) from the past 3 years.	50
Reputation for timely and high-quality provision of events management and marketing services	Positive reference reports	50
<b>TOTAL</b>		<b>100</b>

- (3) The offeror's cost proposal will be evaluated for:

- Proposed total price, relative to other offers received
- Realism and reasonableness of the work to be performed
- Price reflects a clear understanding of the requirements
- Price is consistent with various elements of the technical proposal
- Compliance with USAID cost principles (select one: Non profit entities – Cost Principles in 2 CFR 200 Subpart E or For profit entities – Cost Principles in FAR Part 31)

Palladium reserves the right to award under this solicitation without further negotiations. The offerors are encouraged to offer their best terms and prices with the original submission.

### PROCUREMENT INTEGRITY AND ETHICS

It is Palladium's Policy that no gifts of any kind and of any value be exchanged between vendors/contractors and Palladium personnel. Discovery of the same will be grounds for disqualification of the vendor/contractor from participation in any Palladium's procurements and may result in disciplinary actions against Palladium personnel involved in such discovered transactions.

### **Resulting Award**

This RFP in no way obligates Palladium to award a contract. Palladium may opt to select multiple offers in response to this RFP.

Any contract/purchase order resulting from this solicitation must be signed by both parties in order to be considered valid and in force. All costs associated with, but not limited to, production, preparation and/or delivery of goods or services, including deliveries, accepted by Palladium staff, without a fully executed (signed by both parties) contract/purchase order, are at the vendor's risk only. Palladium shall not pay for any costs, without limitation, associated with production, preparation or delivery of goods and/or services under this or any other contract/purchase order, which has not been signed by both parties.

If your proposal is successful, you will be required to enter into the Company's standard contract for the types of goods or services being provided. In the provision of the Goods and Services, you will be required to comply with the Company's policies, including (without limitation) its Business Partner Code of Conduct and any relevant client terms and conditions. Potential suppliers must also comply with the Company's Business Partner Code of Conduct in the submission of any proposals pursuant to this RFP.

If you are bidding as part of a joint venture, partnership or similar, please make this clear in your submission. Likewise, if you propose to subcontract any part of the goods or services provision, then disclose this fact within your submission. The Company may require additional information from you and approval for subcontracting will not be automatic as subcontractors will be subject to Palladium's Due Diligence process.

### **Attachments**

Please review the additional documentation and proposed contracts terms and conditions which should be given consideration when preparing your proposal. By submitting your bid you will certify that that you are in agreement with the contract terms and conditions as included in this solicitation and that all prices include all aspects of the required compliance with the terms and conditions of the proposed contract.

Attachment 1- Due Diligence Questionnaire (will be required only for successful offeror, where applicable – included for awareness only)

Attachment 2- FFATA Form (will be required only for successful offeror, where applicable – included for awareness only)

Palladium Business Partner Code of Conduct and Child Protection Guidelines can be downloaded in full at: <http://www.thepalladiumgroup.com/policies> or request through email from [Catalyze.procurements@thepalladiumgroup.com](mailto:Catalyze.procurements@thepalladiumgroup.com)



## Annex A: Scope of Work

The USAID CATALYZE Engines of Growth project will host a hybrid closing event in the first week of November 2024. This half-day event will be held in Belgrade, Serbia. The event will bring together USAID representatives and EoG stakeholders to present and celebrate the project's achievements, impact, and lessons learned in an interactive and engaging format. There will be a maximum of 60 in-person participants joining the event in Belgrade and a number of online participants (exact number TBD). The hybrid mode must allow the remote audience (mostly from the US) to follow the presentations and participate actively with comments and questions.

To support the event, EoG invites eligible agencies to submit a creative concept within the provided parameters and specifications for the event. The concept should include innovative formats and activities that align with the event objectives, but should incorporate the specified elements listed in Annex A: Services Requested. Possible elements could include interactive presentations, discussion sessions, awards and recognition ceremony, and networking opportunities. The concept should aim for a dynamic atmosphere with alternating speakers and topics in an attractive way that keeps audience attention.

The primary audience for the event will consist of USAID Missions from Western Balkans countries, USAID/USG representatives from the Eurasia Bureau, and selected project partners, including financial/ non-financial institutions, financial experts, and BASPs.

### Services Needed

The agency will be responsible for the full creative and technical preparation and execution of the hybrid event (both in-person in Belgrade and online). Services required include:

- **Creative Concept and Branding:** Develop and apply a creative concept for the conference, including creative event name, the format and features of video materials, venue branding, stationary products, and digital visual assets.
- **Event Logistics:** Rent and manage the event venue and catering services.
- **Technical Setup:** Rent and operate technical equipment, including live streaming and online participation platform (hybrid mode), high quality and stable internet connection, and translation services.
- **PR and Media Production:** Provide PR services, photo, and video production and post-production
- **Legacy Materials:** Prepare project documentary video/videos that will be showcased during the closing event. Prepare other legacy materials (see details below).

### Legacy materials

As a part of this RFP, all agencies must be capable of creating project documentary videos.

At a minimum, legacy materials must include one longer project documentary video (up to 15 minutes) and additional 3-5 short videos (up to 3 minutes).

The videos should feature interviews with project partners and beneficiaries in three locations: Belgrade, Serbia; Skopje, North Macedonia; and Tirana, Albania, creatively presenting project achievements, success stories, and key messages. Approximately 2-3 days for video shooting will be needed in each of the project locations.

The agency is expected to provide a creative concept, scenario, interview questions, and shooting plan. The scenario will be developed in close cooperation with the EoG project team and an economics/finance expert that the bidder will need to identify and engage. EoG will provide contacts and recommendations for the speakers from its pool of partners and beneficiaries. However, it is expected that the bidder will submit initial ideas on the recording and video effects, including graphic and animation, and the storytelling/narrative options, the manner of presenting three different countries/locations, filming in the studio/at the field and similar features of a high quality, high production video materials.

Video timeline: The first scenario draft is expected 10 days after signing the contract, first video draft will be expected by 15 October 2024, the final version is expected by 25 October 2024.

The agency is also expected to support the preparation and publishing of at least two additional legacy materials to showcase the project's results and lessons learned:

1. Legacy publication detailing the project's history, achievements, and lessons learned, including case studies of SMEs that benefited from the project, highlighting challenges, support received, and growth (app. length of 15 page) to be prepared in digital (PDF) format and printed in 60 copies which need to be distributed at the closeout event.
2. Social media package with a minimum of 5 static and animated posts featuring infographics, quotes, short clips, and impact stories to present the project's impact (e.g., number of SMEs supported, funds disbursed, economic growth metrics).

See Annex B: Services Requested for detailed list of services that offerors should respond to.



## Annex B: Services Requested

Description	Amount	Unit	Rate	Total Price	Comments
<b>Creative Work</b>					
Conference concept	1				The agency should propose creative event title, visual identity, and creative event format to ensure the event 1) accurately captures project and event objectives and resonates with the audience, and 2) provides opportunity for active participation of both in-person and online participants in a hybrid mode, over a high-quality platform
Conference Visual Concept (to be implemented in multiple brand material of the conference)	1				
Desing of print materials (Presentations/ Agenda, Backdrop, name tags, other promo products as needed)	60				
Concept & implementation of videos and logo loops for the event	60				
Event Scenario	2				
<b>Production</b>					
Entrance Banner	1				
Backdrop print	1				
Stationary/ promo package production	60				The agency can suggest creative promo items that can be printed and distributed at the event.
<b>Technical Equipment</b>					
Led Wall (Rent)	1				
Audio logistics (rent)	1				
Lightings logistics (rent)	1				
Stage + Carpet (rent)	1				
Transmitter channel for translation	1				
Booth system for translation	1				
Earphones/headphones for guests	30				
Microphones for speakers	5				
Online participation system for hybrid mode	1				
Videography	1	Days			
Photography	1	Days	-	-	
<b>PR &amp; Marketing Promotion</b>					

Description	Amount	Unit	Rate	Total Price	Comments
Online Campaigns (Email campaign, Eventbrite invitation or equivalent, posters design)	1				
Social Media campaign online posts/publications	Min. 10	# of publications			The agency is invited to propose a full campaign and assets, for example: Posts speakers / panel / infographics / general posters
Event videos	3	# of videos			Short video from the event with short interviews/bytes from speakers
Writer/Copywriter	1	Days			
Media Corner Set up	1				
PR Articles	Min. 5	# of publications			The agency to suggest a list of media to be invited and to prepare and distribute a press release
<b>Other</b>					
Catering & Coffee Break	Max. 60 pax	Days			
Venue Rent	1	Days			Additional Day for Set up
Moderator	1	Days			
Translation service	2	Persons			
<b>Project Legacy Materials - Videos</b>					
Production of one long video (up to 15 minutes) and 3-5 short videos (up to 3 minutes)	1	Working days			The agency should propose video scenario, detailed shooting plan, video format, visual effects etc.
Travel to 3 shooting locations (2-3 days per location): Belgrade, Serbia, Skopje, North Macedonia, Tirana, Albania	3	9 Days			
Staff (cameraman, interviewer, make-up artist, etc.)	1	Days			
Equipment (camera, sound, lights, make-up, etc.)	1	Days			
Translation and subtitles embedding	1	Days			
Studio rent (as needed)	1	Days			
<b>Post-Production</b>					
Post-production of project documentary video - long (up to 15 minutes), with graphic elements, animations, Translation and subtitles embedding	1	Days			The production and post-production of the documentary video should take place ahead of the event. The video should be showcased during the event. For more details, please refer to the RFP document.

Description	Amount	Unit	Rate	Total Price	Comments
Post-production of 3-5 short videos (up to 3 minutes) with graphic elements, animations, Translation and subtitles embedding	Max. 5 videos	Days			
<b>Other Legacy Materials</b>					
Legacy publication detailing the project's history, achievements, and lessons learned, including case studies of SMEs that benefited from the project, highlighting challenges, support received, and growth	1				The publication (app. length 15 pages) should be available in electronic (PDF) format and in print (60 copies) to be distributed during the close out event
Social media package with a minimum of 5 static and animated posts featuring infographics, quotes, short clips, and impact stories to present the project's impact (e.g., number of SMEs supported, funds disbursed, economic growth metrics).	1				
<b>Other Fees</b>					
Agency Fee (if applicable)					
<b>TOTAL</b>					